

Organisational working efficiency projects: Commentary on cases where project managers also represent multiple internal users, and some proposed procedural guidelines¹

By Alan Stretton

INTRODUCTION

In the last issue of this journal, I signalled an intention to look in more detail at organisational working efficiency projects which commonly have multiple users, whose collective interests are handled by user representatives (Stretton 2024c).

There can be many types of user representatives, who may include the following.

- permanent appointees (such as some Business Change Managers);
- formally appointed temporary representatives to cover individual projects;
- existing department or unit heads;
- emergent informal representatives;
- the delivering project manager.

This article is concerned with how some of these user representatives can go about effectively representing the interests and needs of the many users they typically represent in operational working efficiency projects. There is little discussion on this topic in the project management literature, although accurate and insightful user representation is obviously critical to the success of working efficiency projects.

I therefore propose to draw heavily on my own experience as a project manager delivering operational working efficiency projects, in which I also acted as the representative of the interests of the multiple users of these working efficiency initiatives – a dual role which I have abbreviated to PM+UR (Project Manager plus User Representative). My focus will tend to be on how I went about the latter part of this dual role, in addition to developing and executing the relevant project(s). I will also offer some procedural guidelines on this dual role, based largely on this experience.

I suspect that the dual PM+UR role might be more widely used in practice than is generally acknowledged. It was certainly by far the most common approach adopted in Civil & Civic for operational improvement projects. I suspect this may also apply in many other project-based organisations which rather naturally do most such undertakings by project, and typically give their project managers wider ranges of responsibilities.

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We first look at some types of internal working efficiency projects in a broader context.

TYPES OF INTERNAL ORGANISATIONAL WORKING EFFICIENCY PROJECTS

Internal working efficiency projects within a broader project portfolio context

Shenhar & Dvir 2004, Table 50.2, proposed a strategic portfolio classification as broadly indicated in Figure 1 below, which I have modified slightly, as will be briefly discussed. As can be seen, this is essentially a classification of possible projects that could be components of an organisation’s strategic portfolio.

A STRATEGIC PORTFOLIO CLASSIFICATION		
	<i>Operational projects (existing business)</i>	<i>Strategic projects (new businesses)</i>
External effectiveness projects	<ul style="list-style-type: none"> • Product improvement 	<ul style="list-style-type: none"> • New product development
Internal working efficiency projects	<ul style="list-style-type: none"> • Improvement • Maintenance 	<ul style="list-style-type: none"> • Organisational change (Utility & infrastructure)
	<ul style="list-style-type: none"> • Problem solving 	<ul style="list-style-type: none"> • Research

Figure 1: A strategic portfolio classification, adapted from Shenhar & Dvir 2004, Table 50.2

Identifying three types of internal working efficiency projects

First, I have augmented Shenhar & Dvir’s bare *External* and *Internal* descriptors on the left, to clearly indicate the location of the working efficiency projects to be discussed in this article.

Second, I am uncomfortable with having *problem solving* as a separate type of internal working efficiency project. This appears to me to apply to all types of projects, and would be part and parcel of both operations *improvement and maintenance* projects. I have therefore elected not to discuss *problem solving* as a separate type of project.

Third, I have changed Shenhar & Dvir’s *utility and infrastructure* to *organisational change* projects, which I believe are reasonably synonymous in this context. I will be discussing the latter particularly in the context of *transformational* organisational change, which OGC 2007:249 describes as “a distinct change to the way an organisation conducts all or part of its business”.

Finally, I will not be discussing *research* in this article, because it seems to me that this is too extensive a topic to be restricted to the working efficiency domain.

I am therefore proposing to discuss internal working efficient projects and their users, and user representatives, under the following three headings, following the items summarised in turquoise in Figure 1.

- Operational improvement projects
- Operations maintenance projects
- Organisational change projects

Many, if not most, projects in these three groups have multiplicities of users, whose collective interests are covered by formal or de facto user representatives

The majority of these types of projects typically have a multitude of users. The interests of such multi-users with regard to determining their needs, and helping ensure appropriate outcomes, are commonly delegated to a user representative. As noted in the Introduction, there can be many different types of user representatives.

However, with all types of user representatives, it is obviously vitally important that they exercise their role efficiently, if internal working efficiency projects are to achieve the best outcomes.

How do user representatives exercise their role?

The project management literature has surprisingly little to say about what such user representatives actually need to do to effectively exercise their responsibilities in this role. A key objective of the following discussions is to try and add some suggested approaches to help flesh out some of the existing gaps. We start with the first item bullet-pointed above, namely organisational improvement projects.

OPERATIONAL IMPROVEMENT PROJECTS

There is little discussion in the project management literature on user representatives in relation to operational improvement projects. I therefore propose to draw substantially on my own substantial personal experience in project managing such projects, in discussing both the project management (PM) role, and that of user representative (UR), in these types of internal efficiency initiatives. But we first look at some more general issues associated with operational improvement projects.

Types of operational improvement projects

There are many types of operational improvement initiatives/projects. A partial listing, drawn from OGC 2007: Table 7.3, includes:

- Internal improvement (e.g. improved decision making, management processes),
- Process improvement (productivity or efficiency – ‘doing more with the same’),
- Economy (‘doing the same with less’ – cost reduction)
- Personnel or HR management actions (better motivated workforce - productivity)

Operational improvement projects may be undertaken in restricted local situations, with only single, or few, active users. However, the majority of such projects are likely to

affect many users, and sometimes most users, in the organisation, and we will focus on such multiple users, and their user representatives, in the following discussions.

Formally assigned multiple user representatives covering specific project(s)

As far as I can tell, the type of appointment to the role of user representative for operation improvement projects appears to depend to some extent on the scale of the operational improvement initiatives. My own experience was that the scale of improvement initiatives/projects in the organisations I have worked in does not normally warrant a permanent designated manager, such as a Business Change Manager, to represent the multiple users. This also appears to be the case in some more general contexts, judging by the following quote from Thiry 2010:88:

Only in the case of highly strategic programs would the role of Business Change Manager be warranted

The more usual situation for this context would appear to be for a user representative to be assigned to represent the users, generally in relation to a specific project or program.

Now, in my experience, the user representative role is sometimes added to that of the delivering project manager, as now discussed.

The delivering PM sometimes also acts as the user representative (PM + UR)

In Civil & Civic, it was common practice for the delivering project manager for performance improvement initiatives to be also assigned the role of de facto user representative, and to be held responsible for achieving the outcomes. Indeed, it appears that this kind of extended role of project management (PM) in these types of contexts is not uncommon, particularly in project-based organisations.

I could find very little in the literature about user representatives and what they actually do in multiple user operational improvement projects. As already indicated, I am therefore proposing to draw on my own personal experience in Civil & Civic in the combined program-project-manager-plus-user-representative (PM+UR) role.

One of the most relevant of these programs/projects was the development and deployment of a completely new cost and financial control systems for the whole of Civil & Civic and its projects. Another was the packaging and deployment of network analysis techniques to enhance design and construction planning processes on all Civil & Civic projects from the early 1960s.

In the following I will discuss the main steps I typically took in these, and some other, operational improvement initiatives. It will be seen that these are essentially just common-sense systematic approaches, and I do not claim to have come up with

anything particularly new or innovative. However, it did appear to me that it might be useful to record these processes, and the reasoning behind many of them.

PROJECT-MANAGEMENT-PLUS-USER-REPRESENTATIVE (PM+UR) PROCESSES IN INTERNAL MULTIPLE-USER ORGANISATIONAL IMPROVEMENT PROJECTS

I have classified the processes used in my role as project-manager-plus-user-representative (PM+UR) in internal multiple-user operational improvement projects into the following six stages.

1. Understand present system, and key customer/user perceptions of its utility;
2. Develop, consult, reconcile, and consolidate proposed new processes;
3. Establish best approach to implementing proposed new processes;
4. Define, develop and deploy implementation project(s) and processes;
5. Design and promulgate familiarisation/education programs;
6. Provide direct on-the-job help in internal implementation.

We will discuss each stage in turn, but with the main focus on the first two – because, if we don't get these "right", the final result will have little chance of being "right".

1. Understand present system, and key customer/user perceptions of its utility

It hardly needs to be said that it is necessary for the PM+UR to have a very good understanding of the present system before embarking on the development of an improved system. My first steps, rather naturally, were then to

- Engage with as many key customers/users as possible to better understand their perspectives and perceived needs

Key customers/users could include the sponsor, heads and secretaries of departments, finance officers, influential users, and the like. The first objective, of course, was to get a full appreciation of management and direct user perceptions of the utility of the current system, and their thoughts about how it could be improved. A subsidiary, but no less important objective, was to encourage their subsequent "buy-in" to an improved system.

2. Develop, consult, reconcile, and consolidate proposed new processes

In my experience, developing new processes often has strong iterative elements, involving frequent checks with as many customers/users as possible to get feedback on the perceived adequacy of the proposed new processes as they are being developed:-

- Seek ongoing feedback on evolving new processes from as many customers/users as possible

Typically, there are likely to be differences of perceptions amongst various customers/users about what maximises utility for them. The challenge for the PM+UR is to try and reconcile such differences, decide on optimal solutions, and confirm with relevant parties.

As a PM+UR of improvement projects in Civil & Civic, I found this was often a far from easy task. However, I also found that the constructive and positive attitudes of most of the Civil & Civic people I worked with certainly helped in developing solutions, even in difficult situations.

- Try to reconcile different perceptions, decide on optimal solutions, and confirm with relevant customers/users

Stretton 2022k briefly discussed project-based organisations providing project management services to external customer organisations which have a multitude of internal users – users who typically comprise people or groups of people with different objectives and perspectives in relation to their organisation’s needs. This is not dissimilar to the situation with multiple internal customers being discussed in this article.

That article outlined four steps for undertaking needs clarification in such multi-customer contexts. Three of these steps are broadly consistent with corresponding steps in this article. I am adding the following fourth step, which is based on a contribution by Frame 1994, as discussed in Stretton 2022k.

- Consider putting together an internal task force of key customers/users to confirm needs and develop solutions

I did not personally utilise such a task force in my own PM+UR projects. However, it was not unusual for such groups to be formed in Civil & Civic, usually informally to start off with, to look at some other types of specific internal problem/opportunity situations.

- Consolidate and confirm the proposed overall processes

I have found virtually no immediately relevant guidelines on how to go about optimising multiple user needs in the organisational improvement context.

However, we do have some materials on project supplier organisations helping customer organisations clarify/confirm their basic business needs, which I outlined in some detail in Stretton 2022k. Although it is a substantially different context, some approaches used by supplier organisations in that context appear to have some elements which are either directly, or indirectly, relevant to needs capture in the internal operational improvement context.

I have therefore summarised relevant headings of the former from Stretton 2022k in the right-hand sector of Figure 2 below, and broadly arrayed them against a summary of my approach above, to facilitate consideration of differences and similarities.

PM+UR MULTI-USER OPERATION	STRETTON 2022k: SUPPLIER ORG'S & CUSTOMER ORG'S NEEDS
<p>1. UNDERSTAND PRESENT SYSTEM AND KEY CUSTOMER/ USER PERCEPTIONS OF ITS UTILITY</p> <ul style="list-style-type: none"> Engage with as many key customers/users as possible to better understand their perspectives and perceived needs <p>2. DEVELOP, CONSULT, RECONCILE, AND CONSOLIDATE PROPOSED NEW PROCESSES</p> <ul style="list-style-type: none"> Seek ongoing feedback on evolving new processes from as many customers/users as possible Try to reconcile different perceptions, decide on optimal solutions, and confirm with relevant customers/users Consider putting together an internal task force of key customers/users to confirm needs and develop solutions Consolidate and confirm the proposed overall processes 	<p>UNDERSTANDING CUSTOMERS' BASIC NEEDS IN THEIR BROADER CONTEXTS <i>Customers' basic needs directly relate to their business (or equivalent) contexts Customers' basic business (or equivalent) needs should not be confused with the requirements of project(s) subsequently undertaken to help satisfy these needs</i></p> <p>BROAD APPROACHES TO HELPING CUSTOMERS CLARIFY THEIR BASIC NEEDS <i>Developing a good understanding of customer organisation in its broader context Partnership-type arrangements help in clarifying customers' basic needs</i></p> <p>SOME COMPONENTS OF CUSTOMERS' NEEDS, & RESTRAINTS, RECONCILING <i>Emotional needs; Financial needs; Physical needs; Restraints; Reconciling needs and restraints; Specifying the customer's needs; Obtaining customer confirmation/approval</i></p> <p>SOME MORE DETAILED APPROACHES TO HELP CLARIFY CUSTOMERS' NEEDS <i>Various methods of engaging with customers to help clarify their basic needs Some appropriate attributes for effective needs analysts; PMs & specialist analysts</i></p> <p>MULTIPLE CUSTOMERS ('MULTI-CUSTOMERS'), AND CLARIFYING NEEDS <i>Some multi-customer attributes of typical customer organisations Some steps for undertaking needs clarification in multi-customer contexts</i></p>

Figure 2: Summaries of approaches to needs capture for operational improvement initiatives, and those of supplier organisations helping customer organisations determine their needs

Regarding similarities, the appropriate attributes for needs analysts to be effective would appear to be much the same for both contexts. These attributes, as nominated by Frame 1994:100, and discussed in Stretton 2022k, can be summarised as follows.

Needs analysts must have a strong ability to deal with customers [users] and extract from them a sense of what they truly need; have good political skills; be technically competent; be open-minded; possess a good imagination; have a high tolerance for ambiguity; and be articulate.

There are also substantial commonalities in methods of engaging with customers [users], and also in looking at components of their needs beyond technical ones, at corresponding restraints, and reconciling them.

However, the task of coming up with a consolidated overall statement of needs remains a difficult one, which merits as high a level of participation with multiple users as possible. In retrospect, the fact that Civil & Civic was a project-based organisation, with minimum hierarchical levels, and a general expectation that wide-spread participation should happen as a matter of course, helped me greatly with the internal organisational improvement projects for which I was responsible in the PPM + UR role.

3. Establish best approach to implementing proposed new processes

- Work closely with key users in developing alternative approaches to implementing new processes, and choosing the best

This step involved working closely with key users in developing alternative approaches to satisfying the identified needs, and choosing the best way forward. As I have done in many previous articles in this journal, once again I want to emphasise the importance of

developing alternative approaches in planning all project-related activities, and this early stage of organisational improvement processes is no exception.

The reasons for doing so are unchanged. The first is that this approach is most likely to achieve an optimal solution. Without it, a likely sub-optimal solution would effectively dissipate some of the value of the work of needs analysis, and compromise achievement of the desired outcomes. The second reason is that this approach is all too seldom discussed in the literature, in spite of its obvious benefits.

- Decide on projects to facilitate implementation

Define, develop and deploy relevant implementation project(s) and processes

- Define, develop, deploy implementation project(s)

This is basic project management work, which should involve the participation of as many key people as can significantly help in these processes.

- Integrate project work with other implementation processes

5. Design and promulgate familiarisation/education programs

- Design and instigate familiarisation/ educational programs to promote user understanding and commitment

This stage involves design and instigation of familiarisation/ educational programs to promote user understanding of the improvement processes, and commitment to using them effectively.

Familiarisation processes will already have been initiated in the course of involving as many users as possible in the first three stages – and particularly the first. However, when there are multitudes of users, more extensive measures are needed, and these normally take the form of education programs of various types. In a large organisation, educational efforts must usually be undertaken at a local level, so that a good deal of my work in this context was in educating the educators – followed by occasional guest appearances at educational sessions, to “carry the flag”, as it were.

Some of our major operational improvement initiatives also involved continuing education processes, particularly to pick up people who were new to the organisation.

6. Provide on-the-job help in internal implementation

- Actively provide direct “on-the-job” assistance to help users implement processes, and to promote their adoption of “ownership” of them

Finally, I was a strong believer in actively providing direct “on-the-job” assistance to help users implement processes, and to promote their adoption of “ownership” of them.

Indeed, the Civil & Civic CEO at that time was an equally strong believer and would insist on my regularly visiting our geographically dispersed branches to particularly check on the continuing effectiveness of two of my key projects – the organisation’s cost and financial control systems, and design and construction planning implementation and effectiveness.

Summarising PM+UR processes in operational improvement projects

Concluding this section on operational improvement initiatives, summaries of the six stages discussed above are now amalgamated as shown in Figure 3.



Figure 3: Summary of the six stages of PM+UR processes in operational improvement initiatives

It should again be emphasised that these processes derive from my own personal experience in the combined role of program/ project manager and user representative (PM+UR). Hopefully they may be found useful as background for more detailed

examinations of what user representatives actually do in the context of organisational improvement initiatives, and how they interact with the delivering program/project manager.

It should also be emphasised that the above processes are a combination of program/project management and user representative activities, vested in the one person. In cases where these activities are undertaken by separate entities, they very clearly have to work together in highly collaborative mode to help achieve the operational improvement outcomes. The above processes might then serve as a background resource for detailing the tasks to be undertaken by the user representative and by the program/project manager.

We now move on to discuss the second type of internal efficiency initiative listed earlier.

OPERATIONS MAINTENANCE PROJECTS AND USER REPRESENTATIVES

Types of operations maintenance projects

- Compliance projects
- Operations maintenance projects with multiple users

I have added compliance projects to these discussions on maintenance projects in multiple user contexts, as they are imposed on so many organisations in so many different ways, and generally require user representatives to make sure the relevant requirements are in place when necessary. I have also identified two types of user representatives for multiple users of maintenance projects at large, which can be broadly described as informal de facto, and formally assigned.

Compliance projects

I begin this section with a particular class of maintenance projects, namely compliance projects. These projects relate to compliance with local, state or federal regulations of various kinds, which can cover a wide range of issues, including socio-economic, safety, health, environmental, and legal, to name a few.

Some organisations have permanently designated or temporarily assigned managers who are held responsible for compliance in certain of these areas – for example, the former are commonly in place in the safety and legal domains in many organisations in the construction sector. Where necessary, they, or their temporary equivalents, instigate compliance projects, acting on behalf of what are nearly always multiple users in the organisation. This is a particularly important task when there are mandated changes to compliance regulations, with consequent needs to respond appropriately to the introduction of different requirements.

Informal/emergent de facto PM+URs for some smaller maintenance projects

I am introducing this “informal/emergent de facto” type of user representatives, because many of our smaller maintenance initiatives in Civil & Civic were handled in such informal/emergent modes, and nearly always by de facto PM+URs.

Civil & Civic was a project-based organisation, and most substantive problems which came up tended to be handled as projects, even though not officially designated as such – simply because this was the way we did most things. Civil & Civic also had an ethos regarding problems. If you saw one, you did not necessarily refer it to others to fix. When practicable to do so, you initiated remedial action yourself, together with others most affected, and/or best able to help resolve the problem.

The descriptors “informal/emergent de facto” give something of the flavour of how such remedial actions were initiated and undertaken in multi-user contexts. As just noted, these were mostly undertaken in PM+UR mode – as indeed applied also with more substantial maintenance projects, as now discussed.

Formally assigned PM+URs for substantial maintenance projects

If the maintenance problem was important enough, it also generally involved multiple users, who would be represented by a formally assigned manager, who was invariably in a PM+UR role. However, it should also be noted that, in my experience with Civil & Civic, substantial maintenance issues often signalled a need to instigate broader operations improvement initiatives.

I was one of quite a few people who were assigned trouble-shooter roles in Civil & Civic from time to time. These were invariably in the operations maintenance domain. These were not assignments that I enjoyed, but they were important, and generally involved what were unremarkable common-sense approaches. These approaches typically involved the following steps.

- Meeting and consulting with key users involved, and establishing or confirming the basic nature of the operations maintenance problem;
- Jointly examining alternative approaches to fixing the problem with key users, and deciding what remedial actions were most likely to best remedy the situation;
- Defining, developing and deploying relevant project(s) – if needed – to best help achieve problem solution;
- Working with as many users as practicable to help them resolve the problem.

Predictably, these rather basic steps for PM+UR handling of performance maintenance projects – whether in formally assigned or informal/emergent mode – are very similar to

comparable ones in used in PM+UR operational improvement processes discussed above. Indeed, the performance maintenance processes could be seen as a subset of the more generalised processes for operational improvement.

Therefore, rather than producing a separate set of processes for PM+UR operational improvement processes, I propose adopting the PM+UR processes of operational improvement as summarised in Figure 3 as broad checklist guidelines for the former.

ORGANISATIONAL CHANGE PROJECTS AND USER REPRESENTATIVES

The most extensive discussions on organisational change initiatives that I know of are in the OGC 2007 publication “Managing Successful Programmes” [MSP], and later editions. As the title indicates, it focuses on program management, and is concerned with the role of the latter in undertaking *transformational* organisational change, which it describes as “a distinct change to the way an organisation conducts all or part of its business” (p.249). The other key player is a Business Change Manager (BCM) who “is responsible for realising the resultant benefits by embedding that capability [delivered by the organisational change program] into business operations”.

OGC 2007 does not specifically discuss how the interests of multiple organisational members are ascertained and represented in transformational organisational change. There is a rather generalised section on stakeholder engagement and the role of leadership by program management, but overall, this document has a pronounced “top-down” flavour, with little discussion of ascertaining and incorporating the needs of internal users affected by these organisational changes.

Perhaps the sheer scale of these types of transformational organisational changes limits the scope of such concerns. I suspect that, in the case of less extensive organisational change projects, more attention would be given to the needs of those members of the organisation who are most impinged by the changes. However, I have not had any direct personal involvement with significant organisational change projects, and am therefore unable to contribute anything substantive from direct personal experience.

However, I note that there appear to be some substantial commonalities between more modest organisation change projects and some of the four bullet-pointed types of operational improvement projects discussed earlier under the heading “Types of operational improvement projects”. It therefore seems reasonable to suggest that the processes developed for the latter, as summarised in Figure 3, could well serve as an appropriate template to facilitate potential contributions by representatives of multiple users, or organisation members most affected by organisational change projects.

SUMMARY/DISCUSSIONS

This article has been concerned with organisational working efficiency projects which have multiple users, and particularly where the project managers are also responsible

for ascertaining and effectively representing the interests and needs of these multiple users. I have labelled this role Project-Manager-plus-User-Representative (PM+UR).

Our main interest has been in how to go about effectively exercising the UR role. There is little discussion on this important topic in the project management literature, so I elected to draw on my own quite substantial experience in this PM+UR role in operational improvement project in Civil & Civic in particular.

We first identified three types of organisational working efficiency projects, namely

- Operational improvement projects
- Operations maintenance projects
- Organisational change projects

The primary focus of the remainder of this article was on operational improvement projects, which include

- Internal improvement (e.g. improved decision making, management processes),
- Process improvement (productivity or efficiency – ‘doing more with the same’),
- Economy (‘doing the same with less’ – cost reduction)
- Personnel or HR management actions (better motivated workforce - productivity)

We then discussed combined PM+UR processes in organisational improvement projects in some detail, based mainly on my own experience in this role. These processes discussed were under the following headings.

1. Understand present system, and key customer/user perceptions of its utility;
2. Develop, consult, reconcile, and consolidate proposed new processes;
3. Establish best approach to implementing proposed new processes;
4. Define, develop and deploy implementation project(s) and processes;
5. Design and promulgate familiarisation/education programs;
6. Provide direct on-the-job help in implementation.

We then briefly looked at PM+UR processes in operations maintenance projects and concluded that they could be seen as a subset of the more generalised processes for operational improvement, and therefore did not warrant a separate process listing.

Regarding organisational change projects, it appeared that the scale of transformational types of change projects inhibited the use of PM+UR practices. On the other hand, more modest organisational change projects appeared to have sufficient commonalities with some of the types of operational improvement projects bullet-pointed above to suggest that processes for the latter might serve as a useful template for many organisational change projects.

Overall, the central and most direct contribution to relevant guidelines in this article was my six-stage summary of processes I undertook in PM+UR roles with operational improvement projects in Civil & Civic. These processes do not claim to be more than a personal listing from my own experience – but they were developed in actual practice,

so hopefully may be found useful by other project managers who find themselves in PM+UR roles – which may be more widely practiced than is generally acknowledged.

At a more general level, I also hope that others may be encouraged to develop more substantial guidelines to help other multi-user representatives undertake their roles more effectively.

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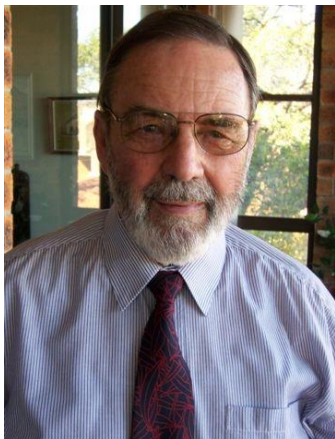
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