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Advisory

Successful PM Standards Implementaion
by Harold Kerzner, PhD and
Al Zeitoun, PhD

Successful PM Standards Implementation[1]

Harold Kerzner, Ph.D. and Al Zeitoun, Ph.D.

DEFINITION _____

Standardization is generally a list of the steps or activities needed to attain a desired outcome. Unfortunately, following the list there is no guarantee that success will be achieved. Standards are guides that can be interpreted differently by each person and may be applied differently based upon the user's personal desires.

Project management standards, as defined in early editions of the PMBOK Guides, were based heavily upon the processes, tools, techniques, checklists and templates that every project manager should follow.

Standardization in project management can be successful as long as the projects begin with well-defined requirements, the risks are clearly understood up front, and the enterprise environmental factors are known and manageable. But when operating in a VUCA environment where changes can occur quickly, standardization may require a great deal of flexibility and interpretation.

Standardization focuses on creating deliverables. Unfortunately, defining success in standardization is difficult because the results can end up not being what the client actually wanted, or we can create products that nobody will purchase. While standardization can lead to success, it cannot guarantee success. When we manage strategic projects that are likely to change direction several times, following standards can be troublesome. Standards can be difficult to enforce when innovation and creative thinking are a necessity.

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EARLY YEARS _____

In the early years of project management, companies that had choices of the project selected would select projects that fit the standards. The conclusion was that we were managing our business by standards. The unfortunate result was that project managers as well as team members were evaluated on how well they used the standards rather than on the performance or outcomes of the projects.

Today, we believe we are managing our business by (successful) projects. PMs are now undergoing performance reviews based upon success of their projects rather than on how well they used the project management tools. There are several definitions for project success. For many of the definitions, standards are difficult to use.

Standards work well when success is measured in terms of time, cost and scope. But today, the most important word in defining success is "value." The purpose of project management is no longer simply to create deliverables. The real intent is to create business value for both the contractor and client. The real definition of success today is when the customer recognizes the value you have created for them and is willing to treat you as a lifetime strategic partner. This benefits everyone.

However, there are challenges. Customers would like a contractor to align their project management approach as closely as possible to the client's life cycle phases, gates, and decision points, as well as selecting metrics that appease the client. Regardless of what we see in project management standards, the relationship between customer and contractor that could lead to a lifetime partnership must be willing to accept the fact that both parties can have different interpretations of standards and use them differently. Company business models and lifetime client relationships have become more important than following standards that may not be accepted by everyone.

Project management has been on a trajectory for increased maturity and recognition. Given the classical high focus on process that the discipline brings, reaching consensus on what success looks like for the implementation project management standards remains a challenge. The readiness of the organization, its leadership, and who is taking the lead for driving the implementation, are all factors contributing to the degree of implementation success.

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In this article we tackle the various root causes for why the implementation varies across organizations, teams, and projects. We reflect on how decision makers have tackled this topic and start a list of possible guiding ideas for the project leaders to consider in increasing their standards implementation success chances.

IMPLEMENTATION CHALLENGES

There are multiple challenges and obstacles for proper project management standards implementation. The most common causes of unsuccessful implementation cross the areas of process, people, and capabilities.

Challenge 1: PM maturity and capability gaps

There remains a low PM Maturity level and multiple capability gaps in today's organocations.

Standards assume a baseline of project literacy. Many organizations lack the trained practitioners or tools to apply even basic elements (risk logs, project charters, governance models) properly.

Challenge 2: Cultural, governance, and leadership gaps

Without a culture of active and consistent sponsorship from senior leaders, PM standards remain optional or symbolic. Executives must walk the talk highlighting the value of and using PM artifacts, participating in governance, and holding project teams accountable.

The fragmented practices across organizational functions or Business Units contribute to pos clarity of roles and responsibilities and ultimately weakens ownership for implementation of the standards.

Siloed departments often have homegrown ways of working. Without an enterprise push and common framework, efforts remain fragmented, undermining cross-functional projects and portfolios.

Challenge 3: One size fits all approach

Many teams see PM standards as rigid or bureaucratic. They resist perceived "one-size-fits-all" approaches, especially in fast-moving or creative and agile environments.
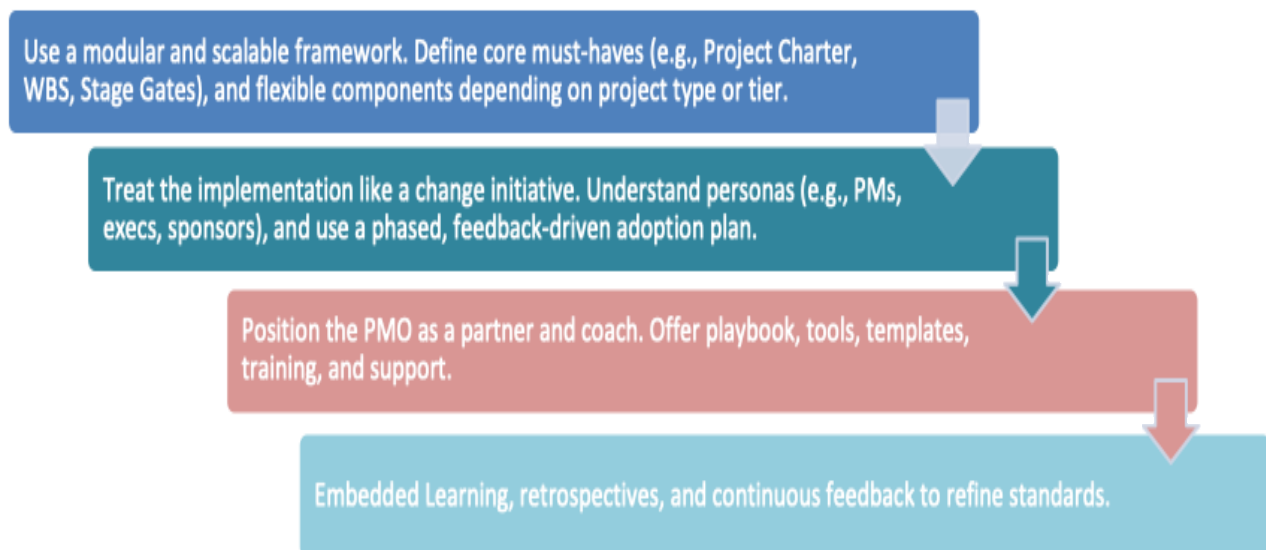
When PM standards are copied wholesale (e.g., from PMI or PRINCE2) without tailoring to the organization's size, complexity, or culture, they could come across as academic or

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out of touch to the organizational needs. Poor fit, coupled with the assumption that the new standards will work here too if it had worked for others in one's industry, leads to poor adoption.

> TIP Having an open dialogue early around barriers to consistent project management standards implementation, provides organizational focus on the required change.

SUCCESS INGREDIENTS _____

All organizations have the desire for growth and achievement of value from their projects. Standards for project management provide the level of assurance for that success. There are a few possible success ingredients to consider in order to reverse the effect of the obstacles above. Figure 1 highlights those success ingredients.

Use a modular and scalable framework. Define core must-haves (e.g., Project Charter, WBS, Stage Gates), and flexible components depending on project type or tier.

Treat the implementation like a change initiative. Understand personas (e.g., PMs, execs, sponsors), and use a phased, feedback-driven adoption plan.

Position the PMO as a partner and coach. Offer playbook, tools, templates, training, and support.

Embedded Learning, retrospectives, and continuous feedback to refine standards.

Figure 1. Standards Implementation Success Ingredients

> TIP A critical cornerstone to successful standards implementation is to properly handle the change aspects while continually learning and refining.

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GUIDING CONSISTENT IMPLEMENTAION _____

FIRST: Define the PM Standards Framework

- Establish lifecycle stages (e.g., Initiate → Plan → Execute → Close)
- Create standard artifacts (Charter, Risk Register, Resource plan, etc.)
- Define thresholds for when standards apply (e.g., based on risk, budget)

SECOND: Develop a Tailoring Matrix

- Classify projects into categories (e.g., Strategic, Operational, Agile)
- Create a matrix showing which standards apply per category to avoid over-application of standards.

THIRD: Create a Standards Implementation Plan

- Conduct a baseline PM capability/maturity assessment
- Prioritize rollout in waves (e.g., pilot with high-maturity teams first)
- Assign change champions within each business unit
- Provide "office hours" with PMO coaches for real-time support

FOURTH: Recognize Adoption and Iterate

- Recognize teams who effectively adopt and enhance standards
- Create "standard implementation champions" network across departments
- Feed lessons learned into quarterly updates of the PM standard playbook

THE PATH FORWARD _____

In order to be future ready with better handling the challenges associated with the successful implementation of project management standards, a few takeaways could be considered:

Build a culture of learning

In the future, leading organizations will adopt a learning culture that is relentlessly open to adjusting and choosing the most fitting standards to guide the successful implementation of the organizational key projects.

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Drive implementation with leadership examples

The growing emphasis on psychological safety means team members want to experiment the with the suitable level of standards. Walking the talk examples are best for making this change stick.

Treat the implementation as a transformation journey

This is a fact and the right coalition of supporters who see the value of the stands should lead this change and help educate, fill the capability gaps, and raise the maturity level to ensure future organizations get the most value from the design and building of such repeatable ways of working brought to life by these standards.

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About the Authors

Harold Kerzner, Ph.D., MS, M.B.A

Senior Executive Director for Project Management
International Institute of Learning
New York & Florida, USA

Dr. Harold Kerzner is Senior Executive Director for Project Management for the International Institute for Learning (IIL). He has an MS and Ph.D. in Aeronautical and Astronautical Engineering from the University of Illinois and an MBA from Utah State University. He is a prior Air Force Officer and spent several years at Morton-Thiokol in project management. He taught engineering at the University of Illinois and business administration at Utah State University, and for 38 years taught project management at Baldwin-Wallace University. He has published or presented numerous engineering and business papers and has had published more than 60 college textbooks/workbooks on project management, including later editions. Some of his books are (1) Project Management: A Systems Approach to Planning, Scheduling and Controlling; (2) Project Management Metrics, KPIs and Dashboards, (3) Project Management Case Studies, (4) Project Management Best Practices: Achieving Global Excellence, (5) PM 2.0: The Future of Project Management, (6) Using the Project Management Maturity Model, and (7) Innovation Project Management.

He is a charter member of the Northeast Ohio PMI Chapter.

Dr. Kerzner has traveled around the world conducting project management lectures for PMI Chapters and companies in Japan, China, Russia, Brazil, Singapore, Korea, South Africa, Canada, Ireland, Germany, Spain, Belgium, Poland, Croatia, Mexico, Trinidad, Barbados, The Netherlands, Sweden, Finland, Venezuela, Columbia, United Arab Emirates, France, Italy, England, and Switzerland. He delivered a keynote speech at a PMI Global Congress on the future of project management.

His recognitions include:

- The University of Illinois granted Dr. Kerzner a Distinguished Recent Alumni Award in 1981 for his contributions to the field of project management.

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- Utah State University provided Dr. Kerzner with the 1998 Distinguished Service Award for his contributions to the field of project management.

- The Northeast Ohio Chapter of the Project Management Institute gives out the Kerzner Award once a year to one project manager in Northeast Ohio that has demonstrated excellence in project management. They also give out a second Kerzner Award for project of the year in Northeast Ohio.

- The Project Management Institute (National Organization) in cooperation with IIL has initiated the Kerzner International Project Manager of the Year Award given to one project manager yearly anywhere in the world that demonstrated excellence in project management.

- The Project Management Institute also gives out four scholarships each year in Dr. Kerzner's name for graduate studies in project management.

- Baldwin-Wallace University has instituted the Kerzner Distinguished Lecturer Series in project management.

- The Italian Institute of Project Management presented Dr. Kerzner with the 2019 International ISIPM Award for his contributions to the field of project management.

Dr. Harold Kerzner can be contacted at hkerzner@hotmail.com

Dr. Al Zeitoun, PgMP, PMI Fellow

Strategy Advisor & Global Future of Work Executive
Maryland USA

Dr. Al Zeitoun is a Future of Work, business optimization, and operational performance excellence thought leader with global experiences in strategy execution. His experiences encompass leading organizations; delivering their Enterprise Digital and Business Transformation; guiding fitting frameworks implementations; and using his empathy, engineering insights, and collaboration strengths to successfully envision new business models and execute complex missions across diverse cultures globally.

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In his recent role with Siemens, he was a Senior Director of Strategy responsible for driving the global program management practices, Master Plan governance, and enabling the Strategy Transformation processes and priorities.

In his position, as the Executive Director for Emirates Nuclear Energy Corporation, Abu Dhabi, UAE, he was responsible for creating the strategy execution framework, achieving transformation benefits, governance excellence, and creating the data analytics discipline necessary for delivering on the $40B complex country energy mission roadmap.

At the McLean, USA HQ of Booz Allen Hamilton, Dr. Zeitoun strategically envisioned and customized digitally enabled EPMO advisory, mapped playbooks, and capability development for clients' Billions of Dollars strategic initiatives. Furthermore, he led the firm's Middle East North Africa Portfolio Management and Agile Governance Solutions.

With the International Institute of Learning, Dr. Zeitoun played a senior leader and global trainer and coach. He was instrumental in driving its global expansions, thought leadership, and operational excellence methodology to sense and shape dynamic ways of working across organizations worldwide. He speaks English, Arabic, and German and enjoys good food, travel, and volunteering. Dr. Al Zeitoun can be contacted at zeitounstrategy@gmail.com