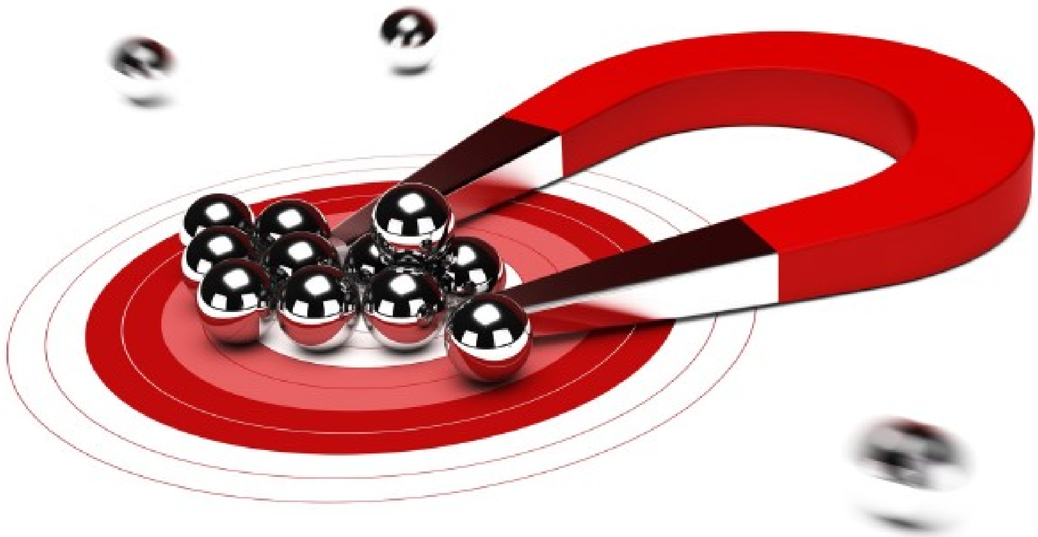
YVAN LAUZON, MBA

LEADERSHIP DRIVEN PROJECT MANAGEMENT



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DEDICATION

This work is dedicated to all the First Ministers and Presidents of the countries of the world, who had to manage important crises related to the coronavirus (COVID-19) pandemic especially; Quebec Premier, ***François Legault***; Ontario Premier, ***Doug Ford*** and the Australian Prime Minister, ***Scott Morrison***.

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Teaching actually various courses in Change Management (CM); Human Resources Management in Technological Environments (eHRM) and Project Management (PM) at the School of Public Administration, University of Quebec (ENAP-UQ).

Since 1987, he has been teaching part time in master's degree Programs in both Canadian and foreign based universities. Such programs would include: Master's in public administration (MPA); Master's in business administration (MBA) and master's in project management (MPM). The main emphasis in recent years has been with respect to Change Management such as; eHRM; Project Management; IT Management; IT/IS Governance; Knowledge Management (KM).

Since 1981, he has also held various positions in both public and private organizations, including as; Assistant to the Chief Information Officer (CIO) of the Government of Quebec from 2006 to 2008; Coordinator of Training Programs in Project Management; IT Management; and Information Security from 2008 to 2012 (CSPQ-CLDC).

Yvan served as Consultant for international organizations; 1993-1996, United Nations: UN-CEFACT-WP4; 2006-2008, OECD. He was also quite active on Boards of directors of Professional Associations like; AAPI (Privacy) and PMI-Lévis Québec-*GP-Québec* (Project Management).

In terms of research, in 2009 he conducted a qualitative study on the success of public projects by interviewing 125 PM practitioners and 25 professors and researchers in PM. Complementary initiatives in 2012-2013, along with the assistance of Francophone Associations of practitioners the required skills for Project Managers were identified applicable to various types of projects. In 2013, Yvan was invited as keynote speaker at the Annual Forum, PMI France. He highlighted the important issues regarding non-technical skills (soft skills) with respect to Project Managers.

Recently, he co-authored three recent books in French relating to: Smart City; Collaboration in Project & Public bodies; Innovation in Governments. Abstracts and Articles are available in English, French and Spanish via: (www.smartconference.ca).

He created and financed different initiatives (Free Conferences & Web sites freely available worldwide) related to Innovation in Public Sector, as: (www.smartconference.ca), (www.climb.express), (www.smartconference.world). Finally, an international Tour is in progress about the ***Required skills in 2020 for Project Managers Leader and their Managers***.

ABSTRACT

This work is dedicated to Leadership in Project Management with five typical cases:

Complex Projects; Intergenerational teams; International teams;
Multicultural teams; Virtual Teams (Relocated or Outsourced).

The emphasis is placed on the importance of Leadership in order to derive the most benefit from project evaluation to chart the best course of action for projects as well as the organizational maturity of Project Management.

Innovative concepts are also introduced touching on the *Global Value of Projects*, which under certain conditions can also be applied to other current corporate operations in private, public or association.

REMARKS

Prof. Yvan Lauzon, MBA via: newmanagement2.0@gmail.com

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This book was not designed for continuous reading; rather it can be used much as a reference document where various sections are pertinent to a situation.

The sections are unique therefore skipping sections and/or coming back to anyone of them is just fine.

TABLE OF CONTENT

FOREWORD

Basics of Project Management

• First and foremost, let's accept the ISO 21500 definition for Project Management:

> *''Project Management is the application of methods, tools, techniques and competences to a project. Project management includes the integration of various phases of the project life cycle. Project management is accomplished through processes''.*

• Then the principal **roles** interplayed within a project are:

> • The *Project Sponsor* acts as the principal continuous link between the funding organization and the project and is responsible to define the business case (typically 5W2H questions starting with: ***Why should we be doing this project?***).
> • When the project is approved, the Project Manager (also called *Project Leader* in some parts of the world as Australia and U.K.) takes on the *Responsibility for delivery* of the defined project objective. Key elements in this role are stakeholder management and guiding the project team and the appropriate stakeholders in applying *''the right project management processes at the right time''*.
> • The *Project Team Member* is responsible for delivering the expertise and work needed.
> • *Project Management Team*: Supports the project manager in leading and managing the project activities. (ISO 21500).

• As well as the Finality of the Project is the object, giving rise to its existence in the first place. Generally, this would be along the following lines:

> *Solve a problem; Build infrastructures; Accomplish a particular event; therefore, a concerted number of activities, with some under the watchful public eye, media reporting and so on.*

• A Project Management Life Cycle (PMLC) typically involves four stages (Groups of processes):
Initiate / Plan / Execute / Close the project/
followed by a fifth group : *Monitor & Control*.

• The PM Body of knowledge (PMBoK), version 6 (2017) from Project Management Institute (PMI), has ten PM Knowledge areas (KA):

> *Communication / Cost / Human Resources / Integration / Procurement /*
> *Quality / Risk / Scope / Time / Stakeholder.*

These ten PM Knowledge Areas (KA) contain different processes, activities, documents, etc.
Some describe Project Evaluation activities, but none is clearly entirely devoted to it.

Boundaries of Project Management

• As Thomas (2015) [1] mentioned, Project management is considered to be a:

- *''Discipline: It spans industry types and involves a system of rules of conduct or method of practice (PM code of ethics). It is interdisciplinary, intradisciplinary, and transdisciplinary.*
- *Profession: It is recognized body of people in a learned occupation, typically requiring education, special skills, or certification.*
- *Job Function: A job function is a role or responsibility with clear expectations and measurable objectives.*
- *Methodology: A methodology is a philosophical approach (involving tactical and strategic elements) that addresses how projects should be handled.*
- *Process: A series of steps or a system used to complete a requirement is a process.*
- *Activity: A task or work item that is a component of a process is an activity''.*

Complexity of Project

• The complexity level of the project must be considered and addressed as:

SIMPLE / COMPLICATED / COMPLEX / DISRUPTIVE INNOVATION / CHAOTIC.

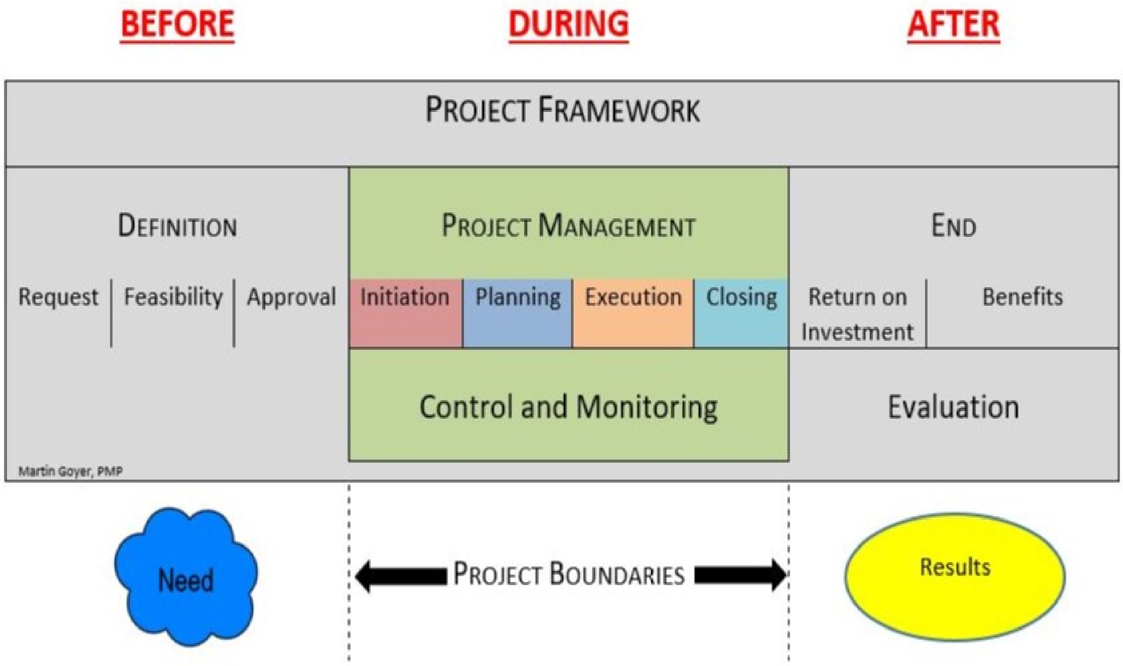
Project Management Performance

• I have been teaching *Project Management Performance* for fifteen years. I first started doing training and Professional Development in business enterprises under the auspices of the CRIM *(an acronym meaning: Montreal Informatics Research Center).* I have also been lecturing on the same subject within the business faculty of the University of Quebec (UQAM and the Quebec School of Public Administration ENAP-UQ). I also taught *Leadership* at ENAP regarding international projects. Needless to point out, those subjects are quite captivating and challenging, especially with the emergence of Collective intelligence and the Mobilizing of the stakeholders, becoming prime themes of interest in management.

However, there is more than just the Project …

• People tend to forget that prior to a project being launched, there is a whole lot of *''housekeeping''* preparation going on. Two key factors are addressed up front in earnest: First, financing and then project approval. Financing is overridingly important. That is true, if and only if the project is, justified in terms of business solution with an acceptable payback period. Then the go, no go turns into a GO. The same applies following the final signoff closing the project. There is, a lot of ancillary items to be addressed sometimes… (;-)

[1] Thomas (2015). ISBN: 978-1482204537.



Source : Martin Goyer, PMP

* * *

INTRODUCTION

• In December 2019, I was completing my mandate teaching and training at Laval University, (*GP-QUÉBEC* Program) with the following caption:

"LEADERSHIP creates value within projects and current operations;
Which must now be BETTER EVALUATED
and PROMOTED across all Stakeholders"

• This is the object of this work, addressing Leadership in Project Management and the Global Value of Projects, which can allow the reader to jump start on those themes, notably five typical case studies, where leadership is a required attribute:

- Complex Projects (Section C)
- Virtual Workgroups *(Relocated or Outsourced)* (Section D)
- Multicultural Teams (Section E1)
- Intergenerational Teams (Section E2)
- International Teams (Section E3)

• Furthermore Section-F introduces an innovative concept, that is: *Project Global Value*, covering:

- *Earned Value* within the Project
- *Value Added* because of the Project
- *Project Shared Value*

• Given certain conditions addressed in sections F and G, the concept of *Global Value* can also be applied to some current operations in public, private and associative organizations.

• This work makes the demonstration of the great importance of strong leadership in order to draw maximum benefits from project reviews to improve project delivery but also contribute to organizational project management.

• The reader stands to appreciate the scope and depth of this work, giving rise to both pertinent analyses and a number of practical tricks and techniques in the field, developed over the years and based on experience and best *project management practices* such as: PMBoKv.6 of Project Management Institute (PMI), or an approach and concepts as taught at the graduate level MPM (Project management), MPA (Public Administration) and MBA (Business Administration) programs.

• Also appended in the Addendum of the **SECOND EDITION** are three sections of great value:

(A) Attributes and competencies required of those involved in projects
(Manager; Project Leader; Team member; Rookie).
(B) Nicely targeted quotes on Leadership and Value.
(C) A list of 48 types of Value added features in projects.

Section A.. Leadership in Action

• Nowadays it is widely recognized that *Leadership* impacts directly on individual and collective performance in modern public, private and associative organizations.

• Leadership is a process of influence by one individual over a group, rallying them to a common goal in a specific context. The effect on those subjected to that influence are basically responding as a result of statements made, gestures or mere presence of the leader.

• It becomes clear, that *Charisma* is the currency of leaders wielding their power to influence the troops. Think of charismatic preachers and you get the idea. Frank Sinatra used to say:

“If you are on the stage and you have no presence, you may as well go drive a cab”

Hence, it is agreed that leadership and charisma hardly be dissociated; it is the first essential characteristic required of project managers. A leader with charisma is fine, but what for? That raises the issue of usefulness to accomplish something. Then, the capacity to manage a work team effectively is an important success factor and this is competency, linked to the task at hand and the objectives that must be met. This represents; optimization of consumed resources and sometimes, innovative applications, which are the core of project management.

• Furthermore, leadership like influence also implies other notions such as power and authority. The following probably is a fair representation of leadership encapsulating the main elements:

> *Leadership is the capacity to influence people, leading them to do things they would not otherwise have done; or to the same extent with the same degree of earnest, aiming at a specific objective target.*

• **Formal Power**: The leader receives legitimate power, given an appropriately defined mandate from the organizational unit, expressing both the scope and range of responsibility. This is essentially a delegated authority with power to execute activities and engage the proper resources for the accomplishment of the objectives. The project manager speaks and represents the organization in all his/her actions.

• **Informal Power**: Flows from the capacity to influence others:

- <u>Personal Power</u>: as a specialist with expertise in a particular domain.
- <u>Endorsements</u>: medals, fellowships & other recognitions.
- <u>Seeking Information Efficiently</u>: Skilled at finding pertinent information useful to colleagues quickly, keeping ears to the ground for rumors, innuendos, hints, signals and more.
- <u>Relational Capacity</u>: Knows who’s-who in the organization. Who can shake things the proper way, therefore dealing with Politics, financial & economic personalities who can resolve problems and kick-start a stalled project to progress and move on?
- Himself serving as <u>role model.</u>
- Could serve as the sacrificial lamb, <u>shielding his boss</u>. Take the fall as opposed to the boss.

• The literature abounds with respect to the qualities of leaders. Since 2009 I documented over 70 of those attributes. Check the following:

> *Resourcefulness; Charisma; Self-Assurance; Focused on Accomplishments; Enthusiasm; Flexibility; Honesty & Integrity intellectual; Intelligence; Emotional Intelligence & Good Common Sense; Focused on People; Emotional Maturity; Perseverance & Tenacity; Team Spirit; Good Sense of Orientation; Well Balanced Life; Ambitious; Vitality; Resistant to Stress.*

• Tricks & tools to insure efficient leadership:

- Use Adaptive Strategies.
- Develop Political Skills.
- Coaching or Mentoring.
- Increase Self-Resilience.
- Emotion Control especially during Difficult Decisions.

• Organizational leaders have the vested responsibility to create value. This is suggesting the organization is better off once a project is completed than before. This is accomplished in earnest and with determination to reach the pre-set object with the desired skills to make it happen effectively.

* * *

Leadership: Innate or acquired?

• An interesting question is: *Is leadership innate or is it acquired and therefore learned?* Management literature supports both theses.

• The Leader shines and reveals himself according to a specific situation many times.

For instance, during a major ice storm in Quebec in January 1998, then Quebec Premier *Lucien Bouchard* distinguished himself with great colors, handling the crisis effectively and delivering pertinent and useful information to the population as the crisis was developing. The electrical delivery systems had collapsed and scattered on the ground in a large region of Quebec. Given the treatment of the crisis by the premier in the media, the public stood witness to the progressive resolution of the disaster towards full restoration of the power grid despite great weather adversities and the total contribution of no less than heroic field workers. This was a high-quality stroke of Leadership given the critical circumstances.
Congratulations Lucien! You are certainly a true *Leader in action*.

• During the covid-19 crisis, the Quebec Premier, *François Legault* and Montreal Mayor *Valerie Plante* showed *leadership in action*, proposing concrete measures for international airports, regarding potentially contagious travelers, <u>while this was the responsibility of the Federal government doing nothing about that for another six long days</u>. This was indeed a desperate situation and Quebecers were alarmed at the large number of travelers lending in Montreal.
Perhaps the political opposition was not stimulating enough at the beginning of the event **[1]**.

• *Leadership in action* is not just Charisma or simply *''Fuzzy communications''*.

It is primarily a rational learning process based on trust and credibility in action.
Coherence and consistency between the verbal and delivered action cannot be violated, otherwise the net effect can be quite misleading. Even a minute signal of breach can lead to serious dysfunctions via a fast-down spiral. Hence it is much like the following sequence to be avoided: ***Trust; Mistrust; Defiance; Deviance.***

• In Canada and elsewhere, there are times when politicians have demonstrated insufficient acumen to be classified as real effective leaders, even having questionable credibility, thereby shedding doubt on their legitimacy. Given voting in Australia is an obligation we can observe the emergence of third parties, hoping to capitalize on the public dissatisfaction.
This is the result of the opposing views to receive a voice in the parliamentary system **[2].**

* * *

Qualities of the Leader

• There are numerous studies, which have been conducted about needed qualities or competency attributes for Managers in public and private sectors like the University of Quebec, UQ-ENAP and HEC- School of Management and Commerce, located in Montreal.

• The work, "*Paroles de PDG*" (meaning "*CEO's Words*") peer reviewed by four management professors namely, *Brunelle; Gosselin; Jacob; Orychuk*, at HEC-Montreal and later published in 2014 by *Rogers Publishing*, eloquently highlighted the various personal attributes and managerial skills related to the various types of leadership.

• With respect to HEC-Montreal; Recently I had an interesting meeting with Prof. *Jean François Harvey* co-author of the work: *"Extreme Teaming: Lessons in Complex, Cross-Sector Leadership"* (ISBN: 978-1786354501), offering a complete description of work teams under extreme conditions. According to Prof. *Harvey* and colleague *Amy C. Edmonson* of Harvard Business School, four functions of leadership are required in extreme situations:

i….Create an Engaging Vision.
ii... Develop a Psychologically Secure Environment.
iii.. Develop Shared Mental Models.
iv…Enable Agile Action in Delivery.

• Usually in management, Extreme refers to situations with:
Rapid changing environment, more risky and often complex.

• The literature provides plenty of documentation on qualities frequently present in Leaders. Those mostly referred to are:

> *Courage; Self-Confidence; Excellent at the task at hand; Sense of Accomplishment; Enthusiasm; Flexibility in Action; Honesty; Intellectual Integrity; Intelligence in terms of Intellectual Quotient & Emotional Quotient; Good Common Sense; Focus on People; Emotional Maturity; Perseverance & Tenacity; Team Player; Well Balanced Life; Avid Visionary; Good Stress Manager.*

* * *

Manager vs. Leader

MANAGER	LEADER
• Action Based on Plan & Business Objective.	• Action Based on Vision.
• Seeks to Obtain Consensus.	• Ready to Innovate.
• He Does the Right Thing.	• He Does the Right Thing.
• Ways & Means.	• Long Term Perspective.
• He Explains & Communicates.	• Sets Himself (Herself) as Example.
• Manages Well the Current Situation.	• Questions the Current Situation.
• Drives Matters & Follows-up.	• Has Confidence in Others.
• Rational Mind.	• Intuitive Mind.
•Structuring Process is more important.	• Human factor is more Important.

As far as we are concerned, a GOOD MANAGER must first and foremost be an excellent planner and decision maker and be a convincing speaker.

> • Good Planning: Listening to people and the environment avoiding; the tree hiding the forest.
> • Sound Decision Making: Understanding perceptions and tolerance to risk-taking.
> • To Be Convincing: Implies being convinced in the first place.

• Furthermore: Traditional Management and Modern Management :must be differentiated.

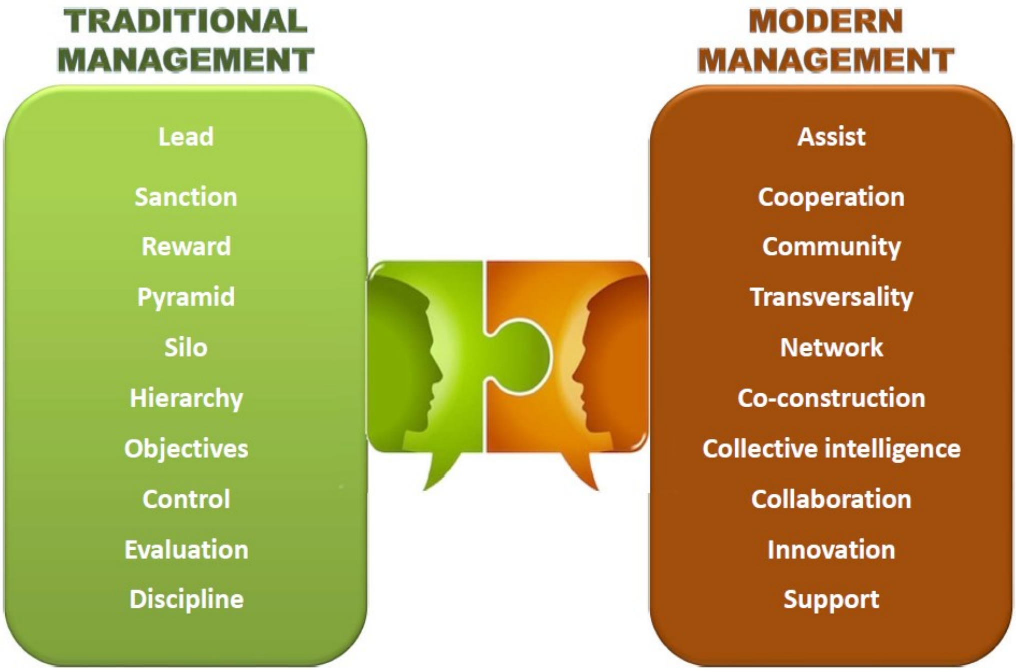


Table 1: Management transformation

Source : Yves-Chantal Gagnon, 2019 in eBook Lauzon Y. ISBN: 978-1989364215 (French version)

* * *

Intuitive Reasoning

• It is taken for granted that a good leader makes effective use of both his intuitive attributes and intellectual capacity to assess and capture the reality as it exists. In my recent collective work: Google™ ISBN 978-1989364345 I treated the subject of intuition at length. Highlighted in the work, the intuition applicable to leaders is a process of analogous comparison with prior similar events and resulting experience. The assessment flowing from the analysis checked against various factors allows the leader to give a sense of orientation and meaning to an idea, an action or phenomenon. Making decisions or taking action strictly on the basis of intuition would be very risky, however let it be clear that, denying intuition as a valuable resource could also be equally risky.

• Martin (2017) introduced the concept of *Integrative Thought Process*. According to Martin, this is the operational decision-making mode of great leaders underlying the quality of their decisions. In effect, confronted with two opposing and irreconcilable points of view, certain leaders are able to rise to the moment and offer an approach above the fray, representing a fresh innovative and more favorable solution. Then, the protagonists rally to the leader offering their support.

• Intuition is a process based on the following mechanisms, which are well documented in literature:

  • Perception more or less wide in scope and global, based on either conscious or unconscious elements. For example, this would be a situation where someone agrees verbally to a decision, while deeply disagreeing internally about it and effectively showing distaste through facial expression.
  • Assimilation through analogies conforming to mental schematic representations relating to widely received patterns. For example, a well-known case or situation, relating to a specific behavioral pattern applicable to a well-known object.
  • Quick action, impulsive response proposed and based on mental schematic representation, stemming from intangible cues, hints and signals from memory. That impulsion can take on various forms; for example, a sudden convincing flash felt physiologically.

• According to Campbell & Whitehead (2010) the leader's intuition is more reliable whenever the following conditions are present:

  • Predictability: Resulting from and based on past experience.
  • Knowledge & Experience: All the required data is present affording analysis.
  • Independence: Not financially or emotionally involved (;-)
  • Comforting Feedback: Reassuring positive feedback based on prior actions or events, which unfolded properly.

• The rationale would receive favorable support through:

  • *Conscious Methodical Perception*, based on data collection and other factual items of information and opinions.
  • Situational Analysis: Ranking of data and information according to criteria based on value and importance then, elaborating various basic premises commonly referred to as assumptions and simulating, doing sensitivity analyses, building up a useable and credible decision model.
  • Identify and describe the various options flowing from the model relating to what interventions are possible.
  • Option criteria will guide what option should be selected and acted upon.

• According to *Center for Creative Leadership* (CCL) 70% of the professional aptitude of a leader are the result of past experience. Knowing how to draw advantage from each situation would be a first development factor contributing to performance as a leader. Georges Lafley, former CEO Procter & Gamble, unequivocally makes this a necessary survival condition for senior managers.

> *"Darwinian theory suggests: Should a leader have stopped developing, learning and progressing then it is likely the end of that leader".*

• More and more authors are leaning to the concept that it is even possible to develop one's own charisma and levels of influence. Surely this can give credence to the adage:

> *"To be convincing implies the need to be convinced in the first place".*

• Having presence associated with the contour of observable values and identity, giving rise to trust and credibility, flowing from self-assurance getting enthusiastic responses associated with a great capacity in effective and persuasive communications, can contribute to generate an excellent rapport with groups from small to large.

• In all cases leaders can be perceived as more credible and convincing, using benign tricks, which have shown their usefulness:

 • Sound preparation ahead with a core message, which is clear, credible, coherent and well presented.
 • Assuming a good physical posture since it plays on emotions and perceptions.
 • Show respect and pay great attention to other parties. For instance, visual panning the audience systematically.

• According to Amy Cuddy (2012):

> *Non-verbal body language does influence those in attendance in how they see the person. It can also impact on how we see ourselves. Showing confidence even when inner doubts linger on can be a determinant to generate confidence in others, leading to improved possibilities for success* **[3]**

• Since the 2008 financial crisis, never in history has so much been written on the subject of leadership. Blogs, conferences and university training programs in industrialized nations have all done the same thing. In Canada, several Short *Leadership Programs* have emerged such as at UQO. IDEM for *Woman Leadership.*

• Highlighted by Gurdjian, Halbeisen & Lane (2014) the various leadership programs in existence in the world, primarily pay attention to the following factors:

 • The applicable context and business sector; for example, *Quantas*™ Airline, which of course is not in the food business as for *Coles*™ or *Woolworth's*™ or a Supermarket.
 • There has to be a continuum between the training and the actual workplace in private or public organizations.
 • It demonstrates the need to act on perceptions and personality.
 • Also measuring the real impacts and change in organizations to move from theory to actual managerial practice.

• Yet the data on ambiance at work and commitment of collaborators shows an ongoing less than satisfactory situation, notably in France for decades. The inspiration of leaders to galvanize the troops does not rise to the expected results.
• According to Pfeiffer (2015) this phenomenon flows from the various actions and discourse held to promote a more inspiring leadership and more ethical, which could over time produce concrete effects. This might result from a leadership approach qualified by the author as naïve and excessively idealistic and cutoff from the reality of daily life. Certain keywords are flashed, such as “be more transparent” and “show humility” without paying close attention to the complex role of the leader and contradictory demands that must be addressed and managed by the leader.

The Table of Contents, listing the topics addressed by Pfeiffer (2015): ISBN: 978-0062383167 are particularly revealing and provoking. Here they are:

1.. Why Inspiration and Fables Cause Problems and Fix Nothing.
2.. Modesty: Why Leaders Aren't.
3.. Authenticity: Misunderstood and Overrated.
4.. Should Leaders Tell the Truth; and Do they?
5.. Trust: Where Did It Go and Why?
6.. Why Leaders "Eat first" **[4]**
7.. Take Care of Yourself.
8.. Fixing Leadership Failures: You Can Handle the Truth.

• Speaking of leadership is fine, however there is a need to emphasize that well-performing groups belong to a well-grounded collective identity and a culture of performance. There is no accident of nature here, it is factual a solid cohesion and commitment in action, working efficiently together facing challenges, overcoming problems and achieving beyond expectations with stimulating performance are always pertinent, valid and properly assessed.

• The most fundamental requirements from the average employee are rather simple and legitimate:

They trust me; My work is meaningful; I work in an attractive environment; My compensation is adequate; I feel I am well regarded by my immediate supervisor; My colleagues appreciate me; It is pleasant; Overall, I feel good at work.

• Nothing is impossible to prevent a so-called great leader from dozing off while sending the other decision makers back to the dressing room, so to speak. (;-)

* * *

NOTES

[1] Pierre Marc Johnson, former Quebec Premier, explained the following during a television interview:

The official opposition at the Quebec Legislature or other British type of Parliament must perform their role adequately otherwise the popular opposition will express itself in the street.

[2] IDEM -- Pierre Marc Johnson.

[3] Source – Excerpts from video: Conference TED, accessible freely :
https://www.ted.com/talks/amy_cuddy_your_body_language_may_shape_who_you_are?language=fr-ca

[4] A wink at the U.S. NAVY, where commanders eat last.

* * *

Section B.. Leadership in Project Management

Why Leadership in Project Management?

• Success in projects and other working activities is intimately linked to the Leadership of Managers, Project Managers (*Project Leaders*) and Work team Leaders.
• Leadership is primarily a set of roles and influences that can be brought to bear by various members of a given team.
• It might turn out it is preferable to pass on the leadership to the next one for reasons of efficiency and effectiveness, creating a kind of *Shared leadership*.
• We often hear expressions like:
''A good Leader does what must be done first, while a good Manager wishes to do things right''.

Types of Leadership

• In Project management (PM) for instance the following types are most revealing:
Shared Leadership; Positive Leadership; Transactional Leadership; Transformational Leadership.

Shared Leadership: According to Professor *Edith Luc* at HEC-Montreal, Shared Leadership is based on the cooperative relationships between the various people, individual and groups in organizations. It is all influences exercised in all directions and at all levels. The targeted goal is the true leader for the group. The reciprocal action mechanism at the center of the Shared Leadership flows from the complementary and differential inputs of the various participants towards collective mobilization. Certain members impart influence based on their expertise; others rally colleagues to integrate various points of view. The process is quite interactive, iterating as a function of the different inputs and goals. Shared perception of leadership causes the team members to be more responsible, being more aware of the issues affecting the accomplishment of the goals. As a result, one of the spin-off benefits is, the staff has an opportunity to grow in their professional capacity.

• According to Clement Leemans, distributed leadership is where people temporarily accept certain aspects even though they are not within the realm of formal leadership. His terminology goes from: *Distributed Leadership*; *Shared leadership*; *Collective Leadership*; or *Integrated Leadership*. The leadership can be allocated over the entire organization, by various levels such as departments.

• **Positive Leadership**: This is essentially rallying the members around one common goal and providing them with the means to progress and achieve generating added value for all intervening parties and stakeholders. Managers, Leaders, and Project Leaders are aiming at adopting this method in terms of authenticity and passion value-creating work. There are four categories used by those involved geared to establish a *Positive work climate*, *Positive relationships*, *Positive communications* and finally the need to incite a *Positive sense to events*.

• **Leadership Ethics**: Here the emphasis is on *"Good and evil"* and *"Good or bad"* at the level of the organization rather than simply at the production level of individual or collective production efficiency.

• **Transactional Leadership & Transformational Leadership:** Per Burns (1978) & Bass (1985):
James Burns (1978) research based his theory on leaders directing their leadership on engagement in a process of effective leadership linking the nature of interaction between leaders and followers. He defined *Transformational Leadership* as the one, which is a source of inspiration, motivation, and human relationships oriented towards getting full support from the followers, by appealing to higher ideals, values of liberty, justice, equality and peace.

On the other hand, *Transactional Leadership* attempts to maintain the status quo, where team members are motivated by objectives and compensation. James Burns goes as far as suggesting that the individual does not necessarily need to have a specific title as leader or be endowed with a formal hierarchical power to manage and transform others, however he is able to do so based on the nature of the relationship and capacity to influence.

Bernard Bass (1985) further completed the work suggesting that both *Transformational leadership* and *Transactional leadership* are not mutually exclusive, rather the effectiveness is maximized when both works concurrently in response to confidence and respect being in full harmony regarding transactional factors of objectives and motivation.

* * *

• In response to a question from an attendee during a training session on August 2018, I identified my selection of key competencies applicable to top project managers:

Beyond doing first and foremost what must be done; there should be no hesitation in questioning the state, as it exists currently.
There are many attributes, which can be listed as follows:

> *Always act in accordance with the proposed vision; Adaptability; Agreeable; Sympathetic & Helpful; Forward Looking; On Target Anticipation; Persuasive; Courageous in decision making & Action; Discerning; Exemplary Model; Trusting Others; Stress Resistant; Innovative; Inspires Action; Shared Leadership; Passionate; Respectful of Employees, consultants and Stakeholders; Sensitive; Political & Strategic Savvy; Long Term Perception.*

• The various contexts where work teams and project teams operate and generate an important impact on the organizational performance:

- Characteristics of the task at hand: For instance, large degree of interdependencies.
- Composition of the Work teams.
  (Diversity: organizational; demographics; psychological; cognitive).
- Organizational support: favorable organizational atmosphere.

• Research has forever been trying to penetrate the secret of project leaders, examining their personality traits: For example, intelligence, dominance, their behavioral patterns; those centered on the task at hand or relationships. Leadership rising to the real situation and their capacity to create a climate of confidence and serve as model for their collaborators, the level of commitment even in tough periods or even crisis, and their capacity to quickly adapt to changing situations giving rise to a leadership compatible with the projects.

Winning Project Teams

• Less efficient project team leaders know well how to use their political skills as interpersonal influence, social finesse and perceived sincerity. They are also skilled at increasing the power of the team members towards winning conditions as well as give sense to their work. He proposes challenging and stimulating targets, which are important for the organization. He leaves a fair amount of autonomy to the members as job' enrichment, however this is done with the right checks and balances to avoid dysfunctions and useless downtime.

• Those team managers also know how to assemble a winning team, bringing together people who work well together. This is ideal when collective intelligence has to be brought to bear to diagnose and resolve problems. Think as a team, design as a team, learn as a team and explore alternatives in unknown territories. Those managers are the specified resource to manage complex projects.

* * *

Section C.. Leadership Needed in Complex Projects

First the Finality of the Project

• As seen earlier, leadership is largely situational, but must be dealt with in terms of the finality of the work team whose objective is just that, finality of the project itself.
Then assess the level of complexity of the project. For example:

> *Solve a problem; Build or renovate an infrastructure; Accomplish an event composed of project activities, which many times are under the tense and watchful eye of the public and more.*

Basics of Project Management

• First and foremost, let's accept the *ISO 21500* definition for Project Management:

> *''Project Management is the application of methods, tools, techniques and competences to a project. Project management includes the integration of various phases of the project life cycle. Project management is accomplished through processes''.*

• Then the **principal roles interplayed within a project** are:

• The Project Sponsor acts as the principal continuous link between the funding organization and the project and is responsible to define the business case (5W2H questions: *Why should we be doing this project?*).

• When the project is approved, the Project Leader (or Project Manager) takes on the Responsibility for delivery of the defined project objective. Key elements in this role are stakeholder management and guiding the project team and the appropriate stakeholders in applying *''the right project management processes at the right time''*.

• The Project Team Member is responsible for delivering the expertise and work needed.

• As well as the Finality of the Project:

> *It stands to reason that the finality of the project is the object, giving rise to its existence in the first place. Generally, this would be along the following lines: Solve a problem; Build infrastructures; Accomplish a particular event; therefore, a concerted number of activities, with some under the watchful public eye, media reporting and so on.*

Complexity of Project

• The complexity level of the project must be considered and addressed:

> *SIMPLE / COMPLICATED / COMPLEX / DISRUPTIVE INNOVATION / CHAOTIC.*

Only the first four are treated in this book, given that CHAOTIC is simply indicative of a project, which for all intents and purposes is out of control.

SIMPLE: The overall predictability level is high in simple projects. The study giving rise to the project, the various associated issues, impacts and probable consequences are clear. Also, the procedures, policies and activities are nicely predetermined and easy to follow. For example, painting your four-room office premises.

COMPLICATED: Obviously not as simple. Then certain expertise should be considered, with the right specialists for the targeted objective, to assess and understand the situation, fragmenting the proposed project into manageable component parts, for instance designing a new plane.

COMPLEX: Here again, such projects are significantly more complex than the first two above and are not nearly as evident to the watchful eye.

• Those projects are the ones, where not all aspects are yet known, and decisions are made with incomplete data giving rise to higher risk factors given the nature of the desired results in the early stages.

• As alluded to above, those projects are difficult to assess and evaluate properly at the inception of the project.

• Behavioral patterns are also difficult to predict.

• The required level of individual knowledge and collective knowledge does not provide an easy assessment of the needed data and information to conduct successfully the said project.

• Those items of information are not always separable into neatly delimited components.

• Many times, it is difficult if not impossible to anticipate the end result completely. Rather, modeling and simulating are the only approach to guide the selected course of action.

• Experts have a hard time reaching consensus on issues and solutions.

• Certain authors suggest the concept, that there might not be a best answer and sooner or later contradictory elements can and will emerge.

• Low acquiescence facing the real situation: commonly shared visions, reaching consensus among varying stakeholders.

• Many times, those projects do not evolve as predicted.

• Procedures and early detailed planning rarely work for those projects.

• In such contexts, collaborative work might be better than cooperation, for independently constructed deliverables.

• Those projects tend to be creative and innovative.

• Complex projects require pragmatism, a heightened degree of managerial expertise and stronger leadership paying attention to several complementary facets.

* * *

Those projects need a certain number of <u>winning conditions</u> as pre-requisite, being in place or existence before even being considered and sometimes simply early in the project.

• The largest possible value-added must be sought, when considering the various stakeholders.

• Holistic view, as early as possible to get the right BIG picture.

• A systemic view is significant because many elements are intertwined, and many times are modified becoming like a moving target.

• An iterative approach might represent a flexible agile methodology.

• Distributed action with multi-team systems.

• A watchful eye, sensitive to weak signals to stay the course keeping focus.

• Managing complex projects imply, calling upon seasoned and performing teams and sometimes, even teams of teams independently interactive towards the collective attainment of objectives.

* * *

Many times, what gives rise to a complex project is the fact that we are now living in a forever more complex world anyway, meaning the following <u>must be considered</u>:

• Looking beyond the mere financial criteria to address other important elements like expectations, results, impacts affecting the stakeholders and communities.
• Internal environment, that is interactions make it difficult to lead to actions but sometimes represent opportunities to introduce novelty features.
• Everything is continually changing. In a way we are undergoing a change dictatorship.
• Gradually we are moving from hard knowledge from the past to uncertainties of the future, where we cannot predict the impacts of newly emerging knowledge.
• New information technology allows far more possibilities, while imparting accelerated societal change, raising issues of trace ability and ownership.

• Paradoxically, information is simultaneously an overload, deficient, subjective and qualitative, diversified and constantly changing in a state of flux.

This raises the question: *How can we make sense of all that?*

To be successful, it is important to pay close attention to the attendant factors, calling upon internal and external resources to come to bear on such projects. Creating a workable synergy is preferable to parties opposing one another.

Disruptive Innovation Project

• This type of project requires creativity and an adventurous attitude. Radical changes are risky and usually perilous.

• Wikipedia Reports the Following:

> *''Disruptive innovation creates a new market by providing a different set of values, which ultimately and unexpectedly overtakes an existing market (e.g., the lower-priced, affordable Ford Model T, which displaced horse-drawn carriages) … … … The term disruptive technologies was coined by Clayton M. Christensen and introduced in his 1995 article Disruptive Technologies: Catching the Wave… ''*

Problems

• By definition, a problem represents an undesired situation emerging from several existing or potential factors, whose cause is unknown at this moment.

• Here is a partial list of such problems having existed in public and private organizations:
- • Fear of conflicts. Snuffed in the bud not knowing how to manage it.
- • Ducking the responsibility.
- • Low commitment of team members.
- • Social laziness ''Ringelmann Effect'' deadweight, significant reduction of productivity from certain individuals in collective work situations.
- • Loss of focus in activities and tasks associated with the project.
- • Loss of confidence among team members and key interested parties.
- • Inadequate briefing of allocated responsibilities to each member as well as the expectations of team and sub-team members.
- • Malaises and unexpressed emotions.
- • Modes of operations never reviewed or questioned during meetings.
- • Conformism of team members, groupthink, paradox & other pathologies.
- • Diverse problems associated to consensus and so on.

- Specific to meetings:
    - Many absentees to meetings.
    - Excessive meeting frequencies low time optimization more or less useful.
    - Poor meeting management, not well announced and scheduled, poorly led, documentation unprepared, low feedback documentation, follow-ups and decisions in action and more.

- There are several pertinent means to resolve problems including two options to address strategic choices in terms of the situation presented:
    - Do nothing to resolve the problem.
    - Create a diversion. Many times, in management, this represents the only solution, given any other approach is losing even more and there are no good alternatives.

- There are other means to resolve problems, such as proposed by Edmond Bourque (2001):
    - Problem detection.
    - Pertinent data collection.
    - Critical analysis of information.
    - Examine exhaustive list of alternative solutions.
    - Choose optimal solution and deployment strategy.
    - Plan the required resources.
    - Evaluate the effectiveness of the solution and allocated resources.

Problems in Complicated or Complex Projects

- Complicated projects and Complex projects may face situations like conflicts, challenges or issues, which can be either complicated or complex.
- Hence, it normally follows that a complicated problem requires sound, rational decision-making, as it could be a unique event with several possible ways to be resolved. Selecting the optimal solution represents a good analysis of alternatives in terms of cost and all other constraints, while trying to rally all the experts to it.
- Furthermore, a complex problem is characterized by uncertainty and the absence of any good easy solution. Sometimes unorthodox solutions, creative and innovative can be applied, something equivalent to a paradigm shift, generating a new trend a source of socio-economic development. Historically, breaking new grounds is where true societal development takes place.

* * *

Types of Complexities

• In February 2018, at the beginning of my international conference circuit on required competencies for project leaders and related managers in the 2020's, I had the opportunity to meet with Julien POLLACK at his office, University of Sydney, Australia for some 30 minutes.

• Remington & Pollack (2007) **[1]** have identified:

<u>Eight Characteristics of Complex Adaptive Systems</u>

1.. Hierarchy.
2.. Communications.
3.. Control.
4.. Emergence.
5.. Phased-Transition.
6.. Non-Linear.
7.. Adaptive.
8.. Sensitive: dependence on initial conditions.

• Based on the research and work of Turner & Cochrane (1993) but also Williams (2002), Remington & Pollack (2007) have proposed 4 types of project complexity:

1 .. Structural.
2 .. Technical.
3 .. Directional.
4 .. Temporal.

• According to Remington & Pollack (2007) :

> *''The source of project complexity will influence the project life cycle, including the critical review points and lengths of project phases within the life cycle, the governance structure for the project, selection of key resources, scheduling and budgetary methods and ways of identifying and managing risks. Different sources of project complexity will also have a major impact on choice of procurement method and approaches to contract management. Any large project, and many smaller ones, will exhibit one or more types of complexity''.*

1.. **Structural Complexity**: According to Remington & Pollack (2007) this type of complexity can be found in most large-scale projects often referred to as mega projects. Such projects are, characterized by the extremely large number of interconnected activities that must be managed through time. It is generally associated with projects in construction and defense department under the purview of engineers.

2.. **Technical Complexity**: This type of projects would be more common in architectural situations and industrial design, engineering, informatics as well as in research and development R&D, like the chemical and pharmaceutical industries.

3.. **Directional Complexity**: This type would be in projects where objectives are not shared or yet intermediate and/or interrelated, that is to say that one has to be accomplished in order to accomplish the other objectives.

- This is also encountered in situations where the signals are rather weak or in cases of hidden agendas. Many times, this type is the result of multiple interpretations and ambiguities associated with the objectives. The management challenges are associated with enough time allocation during the definition of the project prior to launching to allow sharing the meaning and revelation of hidden programs.

- Managing relationships and political organization quite often represents the key to the success of such a project. The political conscience and cultural sensitivity are two necessary fundamental avenues to manage those projects with success.

4.. **Temporal Complexity**: Those projects are characterized by strategic and environmental orientations out of control of the project team:

- This type of project complexity flows from the uncertainties associated with future constraints and changing expectations and eventually the preoccupations with respect to the very existence of the future system. Then people are questioning whether this project will ever materialize.

- This type of complexity is present in projects subjected to environmental impacts insufficiently defined thereby destabilizing the course of the project with serious modifications. Those can be legislative, regulatory or unexpected with civil trouble out of control, catastrophes or the emergence of new technologies.

* * *

Section D.. Leadership Required for Virtual Teams Involved in Projects

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• First, let us define a virtual team, which is essentially a scattered group of workers doing the transversal work over a wide area beyond physical borders organizational or geographical, supported by information technology and communications.

• One would assume the underlying premise is to provide many advantages and cost reductions as well as provide greater creativity and efficient productivity associated to better performance.

• However, in practice, managing such work teams is complicated with various significant obstacles. In the literature, it is reported up to 80% of virtual teams do not meet the objectives planned by the management of their organizations.

• Here are the main usually encountered challenges applicable to virtual teams:

- Using Technological Tools.
- Communication Problems.
- Difficulties in Managing Time Zones.
- Isolation & Lesser Feeling of Belonging.
- Deficient Trust Between Members.
- Misunderstandings Caused by Cultural Differences.

• Within such a context, exercising leadership and distance are truly great organizational challenges. Accordingly, it becomes interesting to focus on the style of leadership required to suit this type of structure, given it is growing rapidly in importance.

Team Complexity

• All such teams are not subjected to the same levels of complexity or challenge.
• Generally, the level of complexity is a function of the following factors and characteristics:

- The work team is larger.
- Several time zones separating members.
- Several national cultural groups.
- Matrix Management is involved.
- Whenever some members are clustered while others are not.

eLeadership

• More is demanded from the *eLeader* than the traditional leader, placing a particular emphasis in daily actions, imparting a climate of trust and constructive dialogue across the team, constantly making clear the goals and objectives of the virtual team. Furthermore, there is an essential requirement to possess exceptional intellectual competencies and master the traditional project management skills and the relational abilities critical and specific to a particular project. Here are four competencies considered essential to succeed with a virtual team in a complex context:

1.. **Empathy**: The virtues of empathy at work are still largely under-estimated, mostly caused by a certain definition. In fact, currently we can appreciate two dimensions to empathy. First an emotional dimension, which is the ability to perceive the emotional state of another person. Equally, often called sympathy that dimension is associated with a reaction much more akin to emotional contagion rather than a simple innate competency. Also, a cognitive dimension adapting another person's perspective in order to understand the intentions and belief system without, adopting it. This of course represents the competency attributes, allowing connecting to people easily by understanding the frames of reference and mental patterns of other people. This form allows the leader to step into the other person shoes so to speak and understand the perceptions. This can contribute greatly to understand the behavioral patterns of the other person in response to the distant work environment. Empathetic leaders are particularly attentive and sensitive to the non-verbal body language even in the distance in order to extract the real essential information.

2.. **Generate Trust**: A difficult aspect to virtual teams for the most part, is the psychological distance, which gradually sinks in between members but also with respect to the leader. That psychological distance is a hindrance to individual, collective and organizational performance. This reflects directly on commitment in action for the members of the team, whom need some level of psychological comfort to generate enthusiasm and value to the work to be accomplished as a team. It becomes the task of the leader to constantly reduce the psychological distance, while creating a climate of trust. Therefore, he has to be able to lean on his team with confidence, while monitoring the performance of the staff. This is done through job enrichment and empowerment with autonomy policies rather than hard monitoring along the concept of command and control.

3..**Tolerance to Ambiguity**: Ability to adapt is a basic skill in virtual context. The agility of the manager finds its acumen in his capacity to extract the real information out a constantly moving unstable environment. The world of virtual work teams is a perfect representation of the new reality facing the working VUCA world.

VUCA stands for: Volatility; increasing rate of change.
Uncertainty; the future is less predictable.
Complexity; multivariate includes more variables.
Ambiguity; there might be no real solution.

eLeaders must be endowed with: Agility, Tolerance and Adaptation.

4.. **Cultural Intelligence**: Managers must develop cultural intelligence, represented by a ready series of pre-planned responses, attitudes and behavioral patterns, allowing an individual to instantly adapt to the multicultural dimension of work teams. Among the required attributes found in the first place is knowledge and self-control since it is important to better understand the impact of one's own culture in the course of managerial practice. Furthermore, it is a good idea to incite interest and curiosity towards the differences among employees. It is obvious listening is the driving characteristic with observation and comprehension, prior to assessing a situation is a good idea. The intensity and impacts of consequences are a function of the ability derived from this concept of cultural intelligence to manage effectively and avoid dysfunctions.

• In the pictorial diagram below, see how important the relational and emotional competencies of the leader are in private and public organizations.

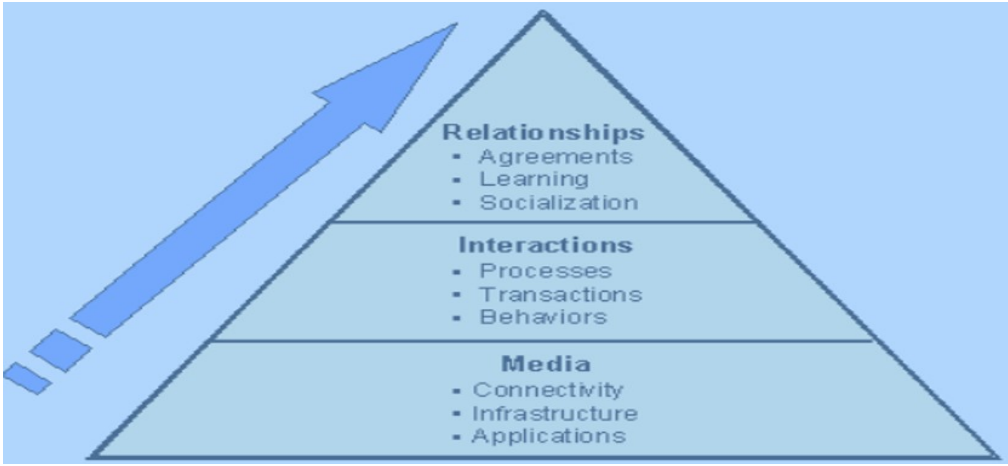

Figure 1. Team Linkages – From Media to Relationship
Source: Lipnack J. & Stamps J. ISBN: 978-0471165538

A Few Practical Pointers

• **Fine-tuning the Competency Profile and Recruiting**: Working in a virtual team requires specific competencies. Ensure the collaborators are at ease with the technologies and they are able to organize their work as demonstrated from prior experience. During interviews, behavioral questions like: " *Can you give me an example of a project where you had to …* ? "
are particularly effective to assess actual accomplishments and where the needed competencies have made the difference.

• **Be Explicit Regarding Objectives and Expectations**: This, in order to avoid delays flowing from difficulties in communications. Make sure the project objectives are well defined. Following that, the team members should be free to ask questions to validate their own understanding of the various concepts, opinions, the scope and range of responsibilities for each. This is a great approach to generate a better overall comprehension of the complete picture. Access online to a well-organized documentation, many times turns out to be a great problem solver. Multiple interesting tools exist for distance collaboration, however success is not purely a function of the tools per se, rather it will be a function of the proper use of such tools added to a comprehension of their impacts on performance.

• **Monitor the Work not Employees**: Managing work progression while not being in a face-to-face relationship can be a daunting experience. Means to follow progression must be found to avoid giving the impression of micro-management. In distance working, it is a better idea to control the quality of the work rather than the number of hours worked. The *eLeader* should define with the team the method to be used to follow the weekly progress. Hence, follow-ups will be perceived as an exchange and support. To avoid working in isolation, progress should be made available to everyone to achieve real collaborative work, where the whole team works together and not in cooperation mode, which is grouping isolated works.

• **Be Genuine and Generate Proximity**: Distant relationships tend to be cold, based on protocol and formal. To enhance exchanges and create trust the *eLeader* has a vested interest in knowing more about his staff, done in compliance with the rules of ethics and management. He himself can incite overture by letting out a few elements about himself. The goal is ensuring a genuine leadership to create and nurture trust despite the distance involved.

• **Organize Virtual Social Activities**: Along the same concept, sometimes it can be difficult to have a conscious or explicit sense of belonging to a virtual work team with cohesion and improved working climate. Various activities to consolidate the team, such as team building can be programmed. Informal exchanges inclusive of general topics disconnected from work issues can be an effective form of consolidation over collaborative platforms. This should not be viewed as a waste of time; rather it should be viewed as beneficial to the project.

• **Welcoming New Arrivals**: A newly arrived staff must be properly welcomed and made comfortable joining a new team. Integration and a sense of belonging are essential. It has to be more than just a business memo informing everyone. Efforts and some resources must be deployed to ensure this integration and get the wanted commitment and performance.

• **Rely on a Good Launching Encounter**: The literature shows the leader should have a face-to-face launching meeting with the staff, as it would maximize the chances for team success. This is somewhat odd and paradoxical, as it is counter-intuitive, having a face-to-face meeting while the basic concept involved is virtuality.

• **Periodic Face-to-face Meetings**: The need expressed by team members to have monthly, quarterly or annual meetings represents a paradox given the virtual existence of the team. In fact, face-to-face meetings are important and effective, allowing more efficient communications, richer in useful information flowing from verbal interactive exchanges as well as from body non-verbal language. It makes for a more coherent message at work creating a more tangible ''*esprit de corps*'' within the team as a whole, realigning efforts and enhancing productivity with greater job satisfaction and commitment. According to Dubé (2009) such encounters provide the team members an opportunity to know one another in personal networking.

* * *

Section E.. Leadership in Diversified Teams:

Multicultural, Intergenerational, International

• According to Sobel Lojeski & Reilly (2008) [2] whenever reference is made to a new type of work team, as in virtual, whether scattered or farmed out, immediately the idea comes to mind, it is physically distant.

Focusing on the aspect physical distance as the main determinant is missing the more important factors, namely operational distance and emotional separation, which can easily become irritants and hindrances to individual and collective performance. Being aware of this fact early up in the project or when operational and working, can help regulate tensions and avoid dysfunctions along the way.

• **Physical Distances**: Coordinating in the distance is not a simple task, especially when different time zones are involved. This can generate downtime and distortions, leading to more budget cost and delays.

• **Operational Distance**: The biggest hurdle is communications, which by their very nature is largely verbal or text. The downside is the non-verbal body language, which is filtered out leaving the pure cold verbal side of the process. As a result, the level of difficulty for coordination can lead to some degree of misunderstanding that can grow over time.

- Heterogeneous Levels of Information: Mixed bag of information as between the members closer to the decision center and where key operations are generally better informed.
- Emotional Distance: Feelings of aloofness with respect to the original group and re-enforcing attachment to the new group geographically closer.
- Lower Feeling of Solidarity: resulting from fewer opportunities for mutual help and reciprocity between colleagues.
- Varied Evolutions: From the designing stage of the mission to the team values.
- Decreasing Commitment in Action: A decreasing degree of commitment seeps in the team with a net result of lesser commitment in action on the part of distant collaborators less in a position to take new initiatives and accept new mandates.

• Katzenbach & Smith (1993) [3] have provided a few tricks to help work teams to progress to a higher level of performance while conserving its capacity to innovate. This approach represents a need to go above mere conflicts between individuals and generate more positive interdependence by the participants and in so doing reach a common basis of efficient work. That takes time and lots of energy.

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[2] Sobel Lojeski, K. & Reilly, R.R. (2008). Uniting the Virtual Workforce. Wiley, 2008. ISBN: 978-0470193952.

[3] Katzenbach, J. R. & Smith D.K. (1993). The Wisdom of Teams: Creating High-Performance Organization. Harvard Business School Press. ISBN: 978-1633691063.

• Even though there is no miracle solution; managers can still help work teams to progress, complying with the Katzenbach and Smith's recommendations (1993), consisting of seven items of advice to be paid attention to:

1.. Right up front three type of capacities must be balanced: Those competencies are: Technical; Relational and Problem Solving.

2.. Select staff on the basis of current abilities as well as potential.

3.. Place hard focus on the importance of the mission and its accomplishment.

4.. Place a great deal of attention on the first meetings, given this is where the first impressions of the staff originate. Those impressions have enduring personal impacts. If the team leader shows any weakness; it is a done deal, it is too late (;-)

5.. Establish an operating policy along with a Code of Conduct [4]

6.. Ensure the team receives a continuous stream of fresh and precise valuable information, pertinent with respect to the mission to be accomplished by the team.

7.. Spend lots of time together. Socializing is important to generate relationships between the members. This is practical when it comes to meetings, facilitating communications. That level of trust invites at superior collaboration and conferences or even ad-hoc informal discussions such as at the coffee machine or the water fountain.

E1.. Multicultural Project Teams

• Early & Mosakowsky (2004) have demonstrated that, those people with a high *cultural quotient* (CQ) have more capacity to succeed in a multicultural group or work team. CQ is defined as the ability to understand and relate to unfamiliar environments or contexts and adjust accordingly, as reported in Harvard Business Review (HBR).

• Hence, it follows that each of us has an inherent perceptive frame of reference regarding behavioral patterns with colleagues, supervisory personnel, managing time and the accomplishment of numerous activities on a daily basis. Essentially, the concept is to be conscious of one's own cultural code to better appreciate the neighbor.

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[4] This is normally included in a ***Project Team Charter***. This spells out the various rules and policies managing the project and every participant is subjected to. Non-trivial features such as: *Punctuality; Failing to attend meetings; Resolution of conflicts* and a lot more are specified. Every team member should assume his/her part of responsibility facing a problem. For example, something to be assumed by every member, coming through frankly to layout what happened with his/her own assessment. There are perceptual tricks, however, hear what the philosopher *Euripide* was saying:

> ***"No one here knows what we all know collectively"***

• According to *Hofstede*, there are five descriptive dimensions applicable to national culture:

- Managing uncertainties.
- Hierarchical separation.
- Individualism or collectivism.
- Feminine or masculine orientation.
- Short versus long term orientation.

NOTE: Even countries can be compared amongst themselves.
Look up: *"Hofstede Insights"* on Google ™

• In work teams, diversity can take on various dimensions, such as: cultural, ethnic extraction, linguistic, racial, color, creed, or deontological as in the case of varied educational backgrounds and professional attributes.
Such circumstances present simultaneously, stimulating challenges, but also great opportunities to enhance productivity, innovate and do better by doing together differently.

Diversity Challenges	Opportunities from Diversity
Takes more time to achieve cohesion caused by prejudice and stereotypes.	Access to knowledge, diversified talents and competencies.
Communications more difficult, non-verbal emotion and expression.	Possible increase of creativity.
More tension in beginning, more risk for inter-personal conflicts.	Less problem risks as identified before: Conformism; Cohesion; Groupthink.
Consensus and decision-making more difficult.	Helpful to penetrate specific markets difficult outside borders.

• Diversity in teams is quite positive, especially when the tasks to accomplish represent creativity and innovative initiatives, rather than mere routine.

However, it is largely a question of adequate timely feedback and related recognition.

MORE Efficiency	LESS Efficiency
Differences are recognized early.	Differences are ignored.
Members are selected on competencies.	Selected on basis of ethnic origin.
Common objectives.	Individual objectives.
Respect and empowerment for all.	Ethnocentrism and cultural dominance.

• MANAGERIS Synthesis 222b, found via website manageris.com, is titled:

"***Muscle up Intercultural Competencies***"

(Free translation: *''Muscler ses compétences interculturelles''*).

Here is an excerpt of the synopsis available on the Internet:

> *"Nowadays, almost no one works in a monocultural environment. Migration has been such that even a national organization has at its service collaborators from divers' origins. Most of those organizations sourcing resources do business with cross border and offshore vendors and suppliers. Multiculturalism can be stimulating and rich in opportunities. However, it needs to be managed effectively. A captain of industry once said: "It is the Tower of Babel in my organization".*
> *Language is not a problem, given everyone speaks English the lingua franca of the world. I love the ambiance but it's not always easy and simple every day.*
>
> *In fact, we are quite used to the cultural mix. It is important to be capable to delineate and understand the mindset of the counterpart and act according to your own agenda. Comfort zones are shrinking, going out of your way is common, imposing on everybody the need to be patient and seek permanent adjustments to the environment.*
>
> *The diversity is stressful and frustrating and cannot be left to chance; in short it has to be managed. Despite, sincere efforts, exposure and training it remains a difficult task to see eye to eye with someone from another culture, because inevitably conflicts will emerge, and problems pop up.*
>
> *How then, can adaptation efforts be reduced, while attempting at the same time to avoid being gauche about it, which could make matters worse? Especially, trying to overcome the mere comprehension side of it, moving towards a highly functional transcultural agility, nevertheless appears to be a fair objective to aim for."*

• On the Blog of manageris.com we can easily find out ***six points of vigilance to develop your intercultural skills***, with targeted questions:

1.. **Franchise**:

- How far can I disagree or criticize?
- How important is it to preserve appearances?
- What makes a message too abrupt?
- What is the practice for embedding a "difficult message"?

2.. **Enthusiasm**:

- What degree of emotion am I supposed to testify to my interlocutor?
- What is expected of me in terms of positive energies to insufflate to others?
- How is the expression of reservations on a project interpreted?
- What does an enthusiastic response mean to me?

3.. **Formalism**:

- What degree of formalism is expected in the exchanges?
- How important are the forms of politeness?
- What is the order of hierarchical propriety to respect? Is it essential to respect it?
- What are the rules … of clothing? … positioning in a meeting?

4.. **Assertiveness**:

- How far do I have to go to defend my own ideas?
- Is it ok to ask to express one's desires and needs?
- What deference is he expected from the hierarchy?

5.. **Self-promotion**:

- How to talk about oneself and its achievements?
- At what stage can one be reproached for bragging?
- How is modesty considered?

6.. **Privacy**:

- What is normal to make known as personal information?
- Is-it customary to meet the spouses of his work relations?
- How much is the border between private and professional life is porous?

Source: Free translation of excerpts from: Blogue ''Pépites de Management'', article 107
Primary source: Global Dexterity / Andy Molinski. Harvard Business Press, 2013.
ISBN: 978-1422187272.

E2.. Intergenerational Project Teams

• Over the last ten years, we have seen the departure of baby boomers retiring in massive numbers, making more space for younger generations staff to join in. The effect has been to generate organizations with younger profiles but also the need to manage cohabitation between the different generations at work.

• Going back to the first European incorporation in the early 18th (i.e. 1713) century to this day, nowadays a new phenomenon has emerged, which for the first time represents, managing four or five generations of workers simultaneously in an organization, notably in Australia where the retiring age is 70 years.

• Managing this many different generations is a significant challenge irrespective of the time period involved or the area of work under focus. Of course, even during the days of Socrates, 4th century BC the younger set, were criticized. Clearly, it is not a new phenomenon but it has to be managed… (;-)

- Each Generation has its own set of characteristics:
    - Values, Commonly Shared.
    - Real Needs or Perceived.
    - Expected Experience.
    - Seeking Emotions.
    - Demanding towards others & work not negotiable.

- Management must create winning conditions where every team member can find a certain alignment between his/her values and those demanded from the professional activities and relations with the other members of the team. The rest is basically a matter of goodwill to resolve problems. (;-)

- Then, how can the expectations and competencies of each generation be managed effectively? Within the course of management meeting with the team, there could be situations where complementarily between the competencies and the needs can be proposed starting off concrete examples from the past whenever feasible. Also, every generation shows a sense of belonging its own way, which can also be capitalized upon.

- The baby boomer generation was trained to deliver the work as specified without much questioning regarding its finality. Once the specs were ready, work started and that was it. In contrast to this attitude the newer generations tend to ask a lot of questions, even on the specifications of the work to be done. They show a need to know the wider spectrum both upstream and downstream for a better understanding of the actual work to be delivered. These dimensions allow them to get more sense out of their work. Then we can appreciate these two different stances with respect to work and where one fits in, indeed gives rise to a generational cultural clash, needing to be managed effectively. Multiple generations make this even more complex. Sometimes members of younger generations question the validity and legitimacy of management in certain situations. This is probably more a case where things could be accomplished more efficiently, optimizing the process differently or with more modern tools.

- A young staff might find and express the idea that there is not sufficient IS/IT knowledge for better optimality. The best way to get out of a clash is to show open mindedness on both sides of the issue. Better tools can contribute more efficiency. Newer technology tends to be more performing and might give rise to an opportunity to implement such tools.

- It is probably fair to say, younger staff are more agreeable to more flexible working conditions, such as flextime and teleworking. They are more vocal expressing needs and wants, as compared to the more senior personnel. This can cause conflicts and difficult relations at times. While it is clearly a utopian situation, attempting to satisfy everyone with flextime suitable for everyone is unlikely to occur. The point is all parties have to yield a little and perhaps a happy midrange solution can be found.

E3.. International Project Team

• Such projects are typically those with an international mandate at its source.

• My experience in this sector goes back to the time I was completing my MBA program at the University of Paris and also when I was mandated by the United Nations (UN) under a program on multilingualism. It is then that I participated with members from 4 to 12 countries.

• In those projects associated with the various time zones involved, impacting the members, we were literally in an extended workday, nearing ten hours and I took great benefit from the rich cultural diversity allowing a much wider multidimensional analysis in both scope and depth.

• As a result of these experiences I built up an international network of experts in various domains and at a time when social, professional networks did not yet exist… (;-)

* * *

Section F.. Leadership & Project Global Value

Introducing *Project Global Value*

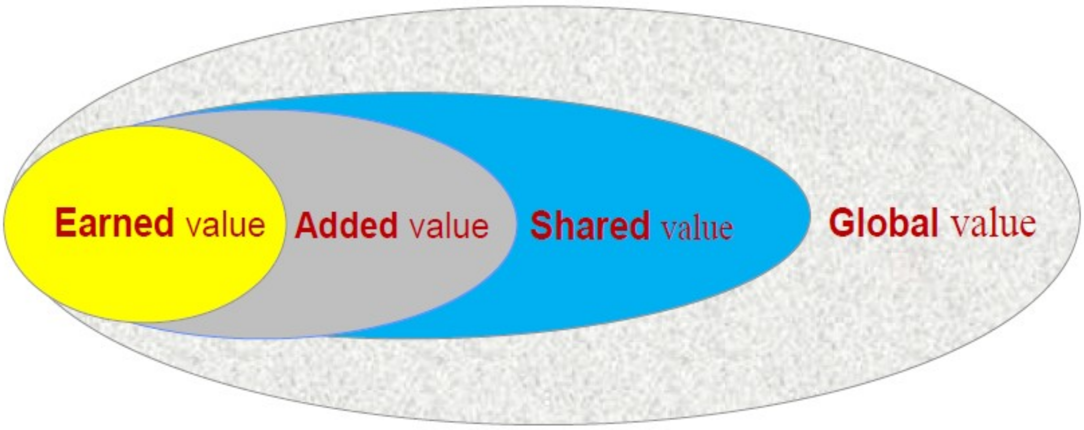
• During a training session I was conducting in December 2019 for *GP-QUÉBEC*, part of *Lévis Quebec* Chapter of the *Project Management Institute* (PMI), I introduced for the first time an innovative concept called: *Project Global Value* [5] including:

- Earned Value, Flowing from the Project itself.
- Added Value, Caused by the Project.
- Shared Value with Stakeholders and Communities.

• During the training conference I proposed the representation as follows:

• The Earned value is a real value obtained by a precise date with respect to the accomplished portion of the project. The Added Value is a value generated by the Project, while the Shared value is the one offered to stakeholders and other interested parties. The Global value is the INTEGRATED VIEW of all those components.

• Those four values are described here in Sections F; F1.1; F1.2; F2.



[5] The first article on the subject appeared in French in March 2020, in the Bulletin of the PMI Lévis-Quebec Chapter: https://pmiquebec.qc.ca/2020/03/30/leadership-valeur-globale-projets/

Global value of *"Current operations"*

• This innovative concept *Global Value* can also be applied to current operations **if** the work activities are well defined in details and also structured. This applies to process output not job outputs. The first one represents a constant flow of predictable activities in exact sequences. The second is based on a constantly changing job delivery making the application of the concept impossible… (;-) To make a point and mostly for accountants, just think of *Process costing* versus *Job costing* and you would understand what this is all about.

Introducing *Value*

• The notion of *Value* is often times used with various implied forms of meaning, which can vary widely according to the discipline involved such as: *Economy, Marketing and Morality* but also simply daily living routine such as, for ex.: Work, daily life, reading and studying, which according to the value of certain emitting sources: ex. Your immediate supervisor, the Top manager or even the Owner investor of the business --versus-- a friend or a contact from a social group… (;-)

• For instance, management values, quite observable and despite a number of competencies, however not shared by collaborators:

Creativity-Innovation; Flexibility; Initiative at Work; Client Orientation; Work Teams…

• Talking of values is akin to value judgment and it is rarely a simple matter, where things tend to be adversary and rather binary:

Color: white & black – Esthetical: beautiful & ugly – Truth: true & false – Morality: moral & immoral – Legal: just & equitable decision or arbitrary & court decision for compromise.

Analyzing Value

• The analysis of value must surely date back to the early forms of human groupings such as primitive villages some 6000 years ago. Three points must be made here:

1.. Many disciplines show interest in value, some starting at various dates and others assessing according to different parameters and points of view,
for instance: Archival; Patrimonial.
Accounting; tariffs as a function of value rendered rather than hours worked;
Finance & Engineering…
2.. Engineering assesses value through a process of Value Analysis, which is planning the value resulting from transforming an existing product. This is to be contrasted from Engineering of Value, which is the needed value in order to design a new product.
3.. This engineering methodology: contribution of *Lawrence Delos Miles*, starting 1945.

• Warren Buffet has his own take regarding value:

*"**Price is what you pay; value is what you get**".*

F 1.. Project Global Value & Project Management

• As pointed out earlier at the beginning of Section-F the global value of the project is represented by three components of value, namely:

F1.1 Earned Value; F1.2 Value Added; F1.3 Shared Value.

F 1.1 Earned Value in Project Management

Project Performance: Breaking the *Iron Triangle* frontier

• Beyond the periodic evaluation of indicator variances (Quality + Cost + Delay) with respect to PMI *Iron Triangle*, focus should also be targeting the pre-project period.
Success Criteria measurements should not be confused with the Key Success Factor (KSF) alluded to above, the latter being more attuned to the environment under review.

Poor project performance

• According to a PMI global survey *Pulse of the profession* 2018: approximately 9,9% of every dollar spent on projects is currently wasted due to poor project performance.
That amounts to 99 million $USD for every 1 billion $USD invested in project.

Performance of Project Outputs & Project Outcomes

• As mentioned by Crawford, Aitken & Hassner-Nahmias (2014) :

> *''Although benefits realization is a hot topic among practitioners at all levels, and many organizations now require benefits to be identified when approving business cases for projects, action to ensure that these benefits are realized is less common. A number of factors contribute to this. First, there is the argument that the project manager is responsible for outputs and the program manager or general management are responsible for delivery of outcomes or benefits from the project.''*

Earned Value Analysis (EVA) per PMBoK ™ 6th edition (section 7.4.2.2)

> *"Earned Value compares the performance measurement baseline to the actual schedule and cost performance. EVM integrates the scope baseline with the cost baseline and schedule baseline to form the performance measurement baseline. EVM develops and monitors three key dimensions for each work package and control account:*
> *Planned value (PV) … / Earned value (EV) … / Actual cost (AC) …"*

• PMBoK defines:

"The Earned Value (EVA) is used to determine the degree of advancement of the project… It is essentially the amount of work done in budgetary terms."

In other word EVA is the following:

> "The budgetary amount allocated to the authorized work done."
> "The EVA is referenced to the planned Baseline value."

• ISO definition:

> Baseline: Reference basis for comparison against which project performance is monitored and controlled (Ref: ISO 21500).

As mentioned in PMBoK, 6th ed.:

> ''Schedule variance (SV) is a measure of schedule performance expressed as the difference between the Earned value and the Planned value. It is the amount by which the project is ahead or behind the planned delivery date, at a given point of time. It is a measure of schedule performance on a project.''
>
> *'' Schedule variance (SV) = Earned value (EV) minus Planed value (PV) ''*
>
> '' Cost variance (CV) is the amount of budget deficit or surplus at a given point of time, expressed as the difference between earned value and the actual cost. It is a measure of cost performance on a project.''
>
> *'' Cost variance (CV) = Earned value (EV) minus Actual Cost (ACT) ''*

• The assessment of the Earned Value is an American standard:
(ANSI EIA 7480-Earned Value Management), which is also promoted by the Project Management Institute (PMI) notably under the form of a publication; December 2019–ISBN: 978-1628256383.

• Certain types of American industries, like *Defense* have taken up the ANSI standard into a series of compliant rules: During a process of acquiring: *Calls for Tender US-DOD*.

• This Earned Value Evaluation (EVA) is treated in Chapter 7 ''*Cost*'' of PMBok version 6 – 2017, more specifically section 7.4 ''*Mastering Costs*''.

• As can be expected, prior to quantifying EVA, there is a number of pre-requisite steps coming together prepping the process with written documentation on hand: This aspect of written documentation is mandatory and therefore not negotiable as:

- Complete descriptive project plan.
- Baseline of the Project.
- Project sequencing by activities and tasks.
- Initial planned value for later comparison on this date.
- Budgetary estimates by activity .

F 1.2 Value Added

• There seems to be a debate in the *''English speaking world''* regarding terminology.
The terms *Value Added* –versus-- *Added Value*.
Let's review what this is all about *''On the NET''*:

> • *"Value added" means value being added by someone*
> *or sometimes value already added*
> • *"Added value" means additional value*
> *or value already added.*
> *Semantically they are the same.*
> *In each situation, simply follow the adopted terminology for that particular context.*

Personally, I tend to see this as a debate among academics also fueled by consultants… (;-)

• For our purpose, we go most of the time with *Value Added* rather than other conceivably quite similar terminology in meaning like: *Added Value; Plus-Value; Value Generated…*

• It follows that logically every pertinent component of value is thrown in and aggregated to the desired meaningful number. The following are such items considered:

- Production generated and/or Serviced rendered.

… PLUS
- Revenue…
- Expense reductions…
- Administrative mergers...
- External business acquisitions or commercial activities…

* * *

F 1.2a Types of Value Added in Projects & Operations

• There is no official classification for projects as observed from international standards such as: The International Standard Institute (ISO) [6].

• Seemingly that minor deficiency bears little except to say, any good analysis must first start with the sector involved. For example, whether the sector is private, public of associative. Then the type is considered. If it is construction for instance then it is important to assess whether the project can return a specific value, which might not serve everyone equally. (;-)

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[6] It is important to keep in mind that an international professional association such as the Project Management Institute (PMI) whose head office is in the USA is not a Standard Pronouncing Institution. Therefore, the PMI must comply with the American National Standards Institute (ANSI), which is the socially recognized and mandated institution, setting standards. In the process, ANSI comes first, setting standards and then ISO may propose the same –OR– ISO have its own set of standards for international applications.

• Despite an important lack of a generally accepted categorization, here is what can be a fair ranking of domestic projects in Canada, for example:

Avionics; Road & Infrastructure Construction; Public Services; Information Technologies (IT).

• Through the years my researches have allowed me to identify **48 types of Value added found in projects** but also quite often in operations from structured activities. Addendum-C of the SECOND EDITION of this work (*available in Canadian University bookstores*) covers the entire range of these 48 types of values.

* * *

F 1.2b Organizing Added Value

• Here we don't assume it is a question of connecting the four resources of the organization namely; Information, Financial, Human and Material assets together, using an *army of consultants with magic formulas* in order to generate instantaneous value.
Such is not the case at all.

• In fact, for anything built up, such as buildings, houses and the like it is generally a result of good architecture giving it functionality and value in use, as public or private assets.

For Example:

- • Architecture of a House: Building plans inclusive of the financing structure and so on.
- • Architecture of Training: Course plan and architecture of the required competencies. Actual situation. Implemented by the resource person, capacity, skills, theoretical knowledge and practices.
- • Architecture of a Project: Plans of the project, but also money-budget, time-budget, project stage sequencing…

Intuition here plays no role and there is no magic wand… (;-)

• The added value is a function of the mission and vision of the organization and builds up through the right architecture with competent personnel in action and other resources properly invested and optimized.

• In organizations, work planning and the optimization of resources can only be effectively accomplished through a skilled management team, balancing the particular attributes of people as assets in respect of their needs within a context of corporate constraints.

• It therefore fallows that work organizing, private or public must simultaneously staff input from the human resource department and business analysts in the IS/IT department. Clearly, a serious attempt must be made to reduce if not totally eliminate staff working in isolation and alone.

"It is best to have people work together, with one another than against one another"

* * *

F 1.2c Value Added in Project Teams and other Work Teams

• The added value could be the result of an individual effort, collective from an organization or several organizations together, governments or private or private public partnership (PPP).

• Working in groups generates efficiency and effectiveness and innovation, learning opportunities and job satisfaction for the team members.

• According to Hackman (2002), team performance can be evaluated with respect to three criteria:

- Team Efficiency: A performing project team is productive in terms of results, generating services, products and new processes exceeding projected organizational objectives as far as volumes, quality, cost and time consumed.
- Team Viability: Teams functioning well, which are quite viable tend to manage well social and behavioral processes, in terms of problems, conflicts and crises resolved constructively.
- Members Learning: Working in a performing team contributes positive learning and the well-being of members.

• In cases of multi-teams, the value added of one team can feed another team as shown by Fernandez (2018).

* * *

F 1.2d System to Measure Project Value & the Business Solution

Why Measure Project Performance?

Here are a few reasonable motives justifying the rationale given time is money:

• Clearly point out to all team members and other stakeholders that meeting a preset target with better performance is an organizational priority. Therefore, this is not an ad-hoc or impulsive requirement from the big boss… (;-)
• Determine the strengths and weaker points needing improvement as regards project management.
• Evaluate more systematically the results from the project but also the solution from the project in terms of products, services or processes.
• Promote an adequate production of the deliverables at the end of the project: Project review; Lessons learned; Individual or Team post-mortem review.
• Give recognition to the good shots and compensate adequately either individually or collectively.
• Enhanced satisfaction of the members. For example, proud to collaborate to a nicely working operation.
• Positive influence of the organization.
• Better individual and collective learning.

Project Performance Measuring System (PPMS)

• In project management, there is the *Earned value* seen and described earlier.

• However, there is an interesting strategic reflection by the international associations like IPMA and PMI on the subject of value such as the value added and the role of the *Project Management Office* (PMO) including the *organizational maturity* in project management.
For example:

> *OPM3 Organizational Project Management Maturity Model (3rd Edition) 2013.*
> *ISBN: 978-1935589709.*

Implementing a Project Performance Measuring System (PPMS)

• Defining a *Performance Measuring System*:

> *It is the aggregate sum of the interrelated processes, inclusive of the activities, measures and components used by an organization to define and assess the accomplishment of the strategic objectives.* Source: Gosselin (2013)

• Achieved value is a quantifying method giving a numerical indicator somewhat similar to what would be found in dashboard control… (;-)

• Implementing a corporate *Project Management Office* (PMO) is a good way to promote, support and manage projects programs and portfolios and manage better. I'm taking this opportunity to underline the quality of research carried out by my ex-colleagues Brian Hobbs & Monique Aubry at UQAM, whom are widely quoted in the literature.

• During my training sessions *Project Evaluation* I make use of two metaphors which I find pertinent as figures of speech. The first one is the Car Dashboard and the second is Olympic Sports:

> • Car Dashboard Metaphor
> *To operate your car properly you need to be licensed to do so, meaning you are qualified and in good standing. Then you need a destination programmed in GPS through either an intelligent phone or other device with the functionality. Controlled levers for the accelerator and braking system and the needed resources such as a good battery and engine in good operating order and fuel are the necessary working components for the car to move forward and do useful work.*

> • Olympic Sports Metaphor
> *Each Olympic Sport has its own set of characteristics and also its own way of measuring results, which is an analogy somewhat similar to projects in the private or public sector and also on the international scene. However, most of those sports share common objectives like uniform measurements amenable to a set of global indicators and also individual indicators.*

Dashboard

• In management there are two families of Dashboards:
- • *Prospective Dashboards* monitoring the development and creation of value.
- • *Management Dashboards* for managing performance.

1.. **<u>Prospective Dashboard or ''*Balanced Scorecard*''</u>**

• This type of Dashboard is used for strategic congruence, serving as a pedagogical tool, attempting to keep collaborators on cue, seeing what their work is useful for, namely an alignment in support of the strategic plan of the organization and also in accordance with the four axes of creation of value, namely:
- • Organizational Learning & Employees.
- • Management Processes.
- • Client Base.
- • Financial.

• The value added is measured with the help of indicators spread over the four axes of creation of value:
- • Client Value: Quality; Accessibility; Delays; Pricing.
- • Financial Value: Budget Policy; Capital Transactions.
- • Organizational Value: Management Processes; Internal Control System (ICS) Cost, Compliance with Rules & Regulations.
- • Value for the Personnel: Job Satisfaction & Enrichment.

• This kind of Dashboard is said to be prospective and strategic in scope, since it monitors and follows up the strategic objectives of the business units or the whole organization, public, private or associative.

2.. **<u>Management Dashboard</u>**

That tool is used to control consumed resources and related results. It is a facility specifically designed to extract live tabulated data and information free formatted according to criteria, generating control information complete with indicators on a timely basis ongoing. The fingertip dimension of such a system cannot be underestimated in terms of management power to intervene and get a reliable dynamic picture of operations, which are activities, resources consumed, production levels, client base and the environment.

Indicators

• In business generally three indicators are commonly used:

• Follow-up Indicators

For example: How many clients have been met? How many follow-ups after contacts? How many delays responding to inquiries? Exacting order data entries and more.

• Results Indicators

Real factual results no wishful thinking; percentage increase in clientele; percentage increase of orders; dollar percentage increase; client fidelity index last 12 months; frequency of product returns; number of quality and service complaints.

• Financial Indicators

Total financial reporting and Management control, specified in dollars (AUD; USD…).

• In order to be useful and therefore meaningful, the indicators have to be pertinent and oriented to the actual brass tacks ground information useful for management control and financial reporting, otherwise it would simply be pie-in-the-sky meaningless and dismissed as such by those for whom it is supposed to be a management tool. Hence, care must be exercised in the design of such IS/IT applications. The tendency should be an evolutionary one, growing it over time to get the real fit avoiding dysfunctions. In so doing useless data overloads and information swamping is avoided, keeping the hardnosed managerial information it is supposed to serve in the first place.

Attributes of Indicators & Measuring Methods

• Indicators first and foremost must address three fundamental requirements.
Ideally striking all three simultaneously is best:

1.. UTILITY: Pertinent information as planned.
2.. VALIDITY: Keeping only the items required to be measured.
3.. RELIABILITY: Consistency of reporting comparative data.

Project Evaluation & Management Response

• Typically, there are several wrong management responses as if trying to change the indicators, following a not so favorable report, where changing the evaluation method might reflect a better picture. (;-)

• A good response is the *Declaration of Intention* where management declares its intention to improve the situation rapidly, rather than deferring to status quo solutions designed to simply buy time. Often, this is done through setting up a committee a work group, whose mandate will be to oversee the difficulties and make recommendations. (;-)

• Then a *Follow up tableau* is quickly distributed to stakeholders, a somewhat mortifying and more demanding from the Professional Project Managers. Hence it documents what needs to be addressed and by whom, leaving a trace.

F 1.3 Shared Value with Project Stakeholders

• The shared value with stakeholders (*) and participants (**) cannot be an improvised element and be de facto part of the senior level project governance (***) much the same pattern as for Strategic Congruence, risks; Performance and Communications.

(*) Furthermore, no connection should be made between Shared Value with the civil side of society as seen by Porter & Kramer (2011) *"Creating Shared Value"* published in the Harvard Business Review (HBR) and other articles. *"Strategy and Society: the link between competitive advantage and corporate social responsibility"* in Harvard Business review (HBR), 2006.

(**) Associations of project management practitioners, notably IPMA & PMI include as stakeholders those participating in the project but also those impacted by the project. The notion of stakeholders is designed to take on the widest possible definition and proposed by the standards pronouncing bodies such as ISO. For instance, stakeholders take in the financing parties, government agencies and regulatory institutions like TSX, SEC MSX, the professions like accountants, engineers and more which is far wider than just the project per se. (;-)

(***) Framework already linked to the Corpus of Knowledge BoK.
For example: PMBoK™ V.6 (2017)

• Business Governance is:

Coherent structure facilitating exchanges of points of view, oriented towards decision making and managing values and processes capturing reality and functional action by business organizations issuing policies congruent with their respective missions in order to survive in a liberal market economy, where many stakeholders depend on, to survive financially and socially.

• There are many tools available for managing the stakeholders.
For example, the Project Management Institute (PMI) suggests:

1.. Stakeholders Analysis Matrix: 2 axes X & Y Power & Interest.
2.. RACI Matrix: Responsible for activity or task, Accountable for results, Consulted to guide task, Simply Informed about progress and decisions made.
3.. Registry of stakeholders: Name, expectations, Classification.
4.. Managing Stakeholders: Name, Influence, Assessment of impact, Strategy.

• I do not propose to change any of those four tools, which are rather well mastered. However, I propose to use the *Project Governance Common Framework* to clearly specify the following:

- WHO will get the plus-value and/or residual value of the project?
- WHAT percentage proportion or what dollar amount?
- WHAT precise date or following which deliverable or event?
- WHAT method of payment to settle the matter? (;-)

• In cases of litigation between parties, there is a need to pre-establish a method of conflict resolution through an enlightened transparent procedure equitable for all parties.

• For example, a simple process like voting is no longer that simple whenever conflicts have emerged, as several options exist, which seems like pulling a rabbit out of a hat at times. (;-)

- Unanimous Vote.
- 50% + 1 Vote.
- Relative Majority Vote.
- Acceptable Minority Vote: several variations or options exist.
- One vote per person versus a number of proxies according to status and relative importance.

• My personal experience of 3.5 years in international standardization setting has demonstrated the necessity to establish consensuses in order to come to a common base of meaning and communication… (;-)

• In terms of conflict and problem resolution [7] I think project management is one of those situations where one must proceed carefully with finesse, keeping in mind the next move much like a chessboard, paying a great deal of attention to various impacts, short and long term on stakeholders, notably associations of workers and pressure groups.

• There is also a need to consider the various modes of resolution [8] as well as maintain good working relations between business partners, leaning more towards gradual measures; for example, a partial reimbursement now, up front and spreading the rest over time.

• It can also be more ideal to attempt settling the problems at the lowest possible hierarchical level without deferral and higher only when a higher official with more power needs to intervene. This escalation is only as a last resort, which would be the case in very important situations requiring more might to settle the issues.

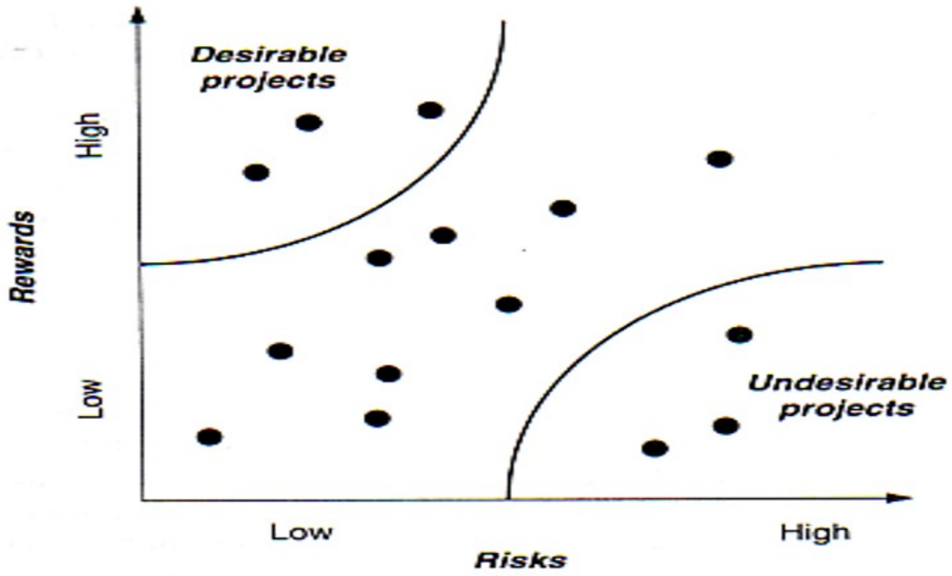
* * *

[7] Problems: differed; simmering conflicts; recognized or latent conflicts.

[8] Beside the court system there are other means such as calling on trustable third parties to play an important role in settling disputes and conflicts. Those would be arbiters, autonomous mediators or institutionalized mediation centers. Waving outrageous delays, legal fees and court cost, this approach has advantages over court dealings because of the flexibility involved and the negotiations that can be carried out and adapted to both parties. Courts tend to be quite binary, that is black or white without paying much attention to details, which many times are as important as the main core issues. Consider that deficiencies in documentation can lead to conflicts later in areas that could not be suspected before it became blatantly important. Furthermore, personally I disagree with the largely accepted concept that conflicts set free large amounts of creative energy applicable in project management.

F 2.. Multicriteria Project Evaluation: Public Projects for Example

• I particularly like the following figure, which applies equally to private and public sector organizations.



Source: Renkema, Willcocks, Williams (2000). ISBN: 978-0471988170.

• In my work titled *Evaluation of Public Projects* [9] (See also [10])
I introduce the fundamental elements of that type of evaluation including practical tricks of the trade touching on:

- • Who and how many of those participants are needed to carry out such an evaluation?
- • 10 principles to be respected, carrying out a multicriteria evaluation of a public project.
- • 40 characteristics applicable to this type of evaluation.
- • Value added dimensions applicable to public projects.
- • Over fifty variables are involved to properly assess public projects.

• I also address those characteristics applicable to the governance of public projects and the field management of those projects while highlighting the interdependence involved.

[9] ISBN: 978-1999461430. 2019-07 - 90 p. (The English version is more complete).

[10] Multicriteria Evaluation of Public Projects (updated). 2019-07 - 132 pages. ISBN: 978-1999461447.

• In that work I make available my practical experience in Multicriteria Public Project Evaluation, spanning over seven projects. Those were electronic service delivery (ESD) systems based on the French methodology MAREVA, which was adapted to, and became known as; *MAREVA Quebec* for years, the risk analyses were conducted under this adapted framework; the risk related security management; the IS/IT development widely deployed in many ministries, public institutions and agencies.

• Typically, public projects are considered when they comply with the following criteria:

• Needed: The required characteristics of the project;
political & regulatory commitment and obligation rationale;
mission of the state; administrative simplification…
Needed for technical reasons. (i.e. Proprietary system no longer supported…).

• Risk Control: Human, financial, legal, structural, operational, implanting technologies

• Significant Value Added of the quantitative & qualitative types, according to 3 levels:
  • State Domain: For the state overall.
  • Organizational Domain: For the public organization managing the project or activity.
  • Public Domain: Impacting the citizens and enterprises of the jurisdiction.

BRIEFLY:

• Leadership is a key success factor in project management; enhancing organizational performance and it must serve to do the following:

• Increase project success.
• Create sustainable value in the organization private or public.
• Increase the mastering of the needed capacities and move towards a greater organizational maturity in project management:
As pointed out in my training sessions, the level of desired maturity has been reached, when one is capable of explaining clearly to senior management why a particular project should not come to exist, while it is something they want… (;-)

• In my research over the latter years I have been trying to demonstrate how the proposed measures and indicators assessing value can be useful to management to guide decisions enhancing the process. This is done with dashboard methodologies aiming at the greatest possible global value gain. OPM3 of PMI must orient the effort, converging towards a more holistic assessment of sustainable performance across the project portfolio.

• I am of the opinion that any serious analysis on value should be carried out first on smaller items rather than on the global picture. This micro approach is less risky providing a useful learning curve growing from item to item to the macro picture over time. It is pragmatic offering a great risk reducer, while leaning to possible innovation in the field:

• Ex. ***Per Project***
or acceptable plan-B could be by type of project regularly carried out in your organization rather than meta-category of project, ex: infrastructures

• Ex. ***Per Business Process***
Rather than macro-processes, or yet business function like marketing
In fact, combining apples and bananas in time will give you a lot of hodgepodge (;-)

• Disciplinary Approaches: There is a certain harmonious cohabitation, without too much contradictions or overlaps between several disciplinary management approaches, for example:

• Value Management.
• Project Management.
• Change Management.

• Sound Research Themes: The global value as described in this text is an adequate theme for the management of projects, which have to be examined along with other themes equally, which surely should be examined in concert with other themes structuring themes

• Required competencies for the project manager.
• Management & harvesting the benefits.
• Multi-criteria evaluation of public projects.
• Multi-criteria evaluation of private projects.
• Multi-criteria evaluation of projects touching on permanent & startups.

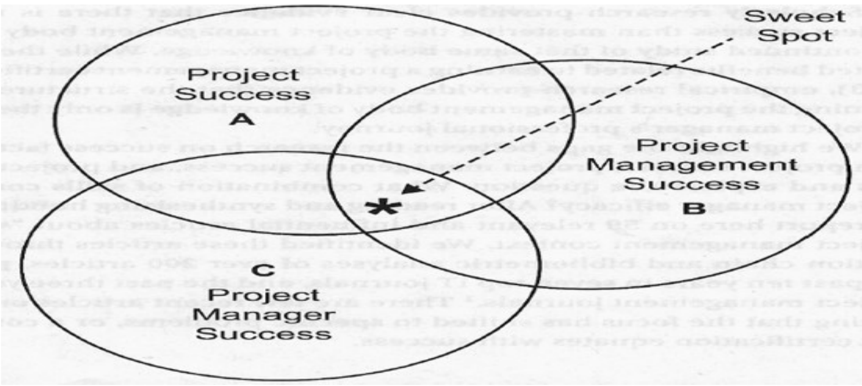
* * *

Section G.. Leadership in Project Evaluation

Three Successes Now Wanted

• Beyond successful project management, there is the success of the project manager to be considered, notably his impact on collaborators and the success of the output of the project: product, service or process.

The required conjunction is called *"Sweet Spot"* par Millhollan (2015)
It is the desired dream place, conceivably a target point.



Source : PM Journal, 2016-10, PMI

Project Evaluation

• Project managers are focused on Key Success Factors (KSF) to enhance the probability of success of their efforts:

• Success Criteria: Those are pointers giving management the capacity to judge the worthiness and likely success. As seen above the project Iron Triangle proposed by the Project Management Institute (PMI), three criteria cannot be allowed to exceed any one of them by more than 10% yielding a negative variance on either: Quality, Cost and Delays (QCD):
- Quality must be accomplished within 90% of the planned objective.
- Stay within cost budget, exceeding it if it must by 10% maximum tolerance.
- Stay within time budget, exceeding with 10% maximum tolerance.

• Key Success Factors: According to Gibson & Cohen (2003) KSF's represent the conditions, which contribute directly or indirectly to the successful delivery of the project. It is relatively easy to identify over fifty of those in the sector of information technology IS/IT for example.

• Shenhar & Dvir (2007) have identified five dimensions leading to successful projects:

- "Effectiveness: Stay within the cost and time budgets.
- Impact on client: Satisfaction, benefits, loyalty and reputation of the brand.
- Impact on team: Satisfaction, retention, learning and personal growth of members.
- Business success: Sales, profits, market share ROI and growth.
- Prepping for future: New technologies, new markets and new capacities".

• Based on the works of Marks & al (2001); Pépin (2012) proposed five project performance criteria:

- <u>Efficiency</u>: The project team delivering results, which could be products, service or processes in accordance with the initial expectations with pre-specified quality.
- <u>Effectiveness</u>: Producing deliverables within the allocated time budget.
- <u>Innovation</u>: A high performance team, innovating creating an improved environment doing better differently.
- <u>Team learning</u>.
- <u>Team Members Job Satisfaction</u>: Introducing the interpersonal processes, leading team members to better communicate, collaborate and coordinate their efforts from one task to the other among one another; to resolve conflicts themselves constructively, developing trust and good team solidarity.

• As Stated by Pépin (2012):

> *"…Project work teams have a dominant role to play for the success of projects…whenever they fail, it is the result of weaknesses in the management skill sets and an incapacity for the members to work well one with the others…"*

• Taking the macro global view, about ten useful criteria can be highlighted:

- QCD: Scope, Quality, within Cost & Time Budgets.
- Project Pertinence.
- Project Coherence.
- Project Effectiveness.
- Project Efficiency.
- Stakeholders Satisfaction and Project Management.
- Project Utility: Considering the real Utility but also what was sought at the beginning.
- Project impacts on clients flowing from the business solution resulting from project.

Evaluation Method for Public Projects

• Referring to my published works and Identified:

• Multi-Criteria Evaluation of Public Projects. ISBN: 978-1999461447. 2019-07. 132 pages
Descriptive list of Twelve Methods for *<u>Multi-Criteria Evaluation of public Projects</u>*,
including: *Public Value Assessment Tools (PVAT)*
/ Center for technology in Government (CTG). University of Albany (USA).

* * *

CONCLUSION

• Project Manager (Project Leader) must:

- • Succeed better its projects.
- • Contribute to create continual value in private and public organizations.
- • Grow in mastering capacities and moving towards more maturity in project management.

• I concluded from my research over the last years, how the approaches to measure value stemming from the world of project management with indicators and dashboard control must now converge into a global, holistic vision and pattern assessing sustainable organizational performance flowing from projects.

• In fact, the *Global value* as described in this work is a theme flowing from research and largely raised in current literature. It has to be examined in the light of other themes as follows:

- • Competencies required of the Project Manager.
- • Managing and harvesting the benefits from the projects.
- • Multicriteria Evaluation of Projects.

• Many times, during my training sessions I would point out to the attendees; that an excellent level of maturity is when a project manager can clearly explain to senior management with conviction:

Why they should not go ahead with the desired project, while knowing they want it done... (;-)

• As far as I am concerned, success in business is competency in action of the entire team.
It is not merely a matter of university degrees, certification and professional development; persistence and hard work are the currency of real success.
It is not a matter of *doing more with less* rather it is a matter of *doing the right thing well*.
There is no doubt luck can play a role in many situations the only thing is, it cannot be programmed... (;-)

Good luck in your projects and career,

Prof. Yvan Lauzon, MBA
(newmanagement2.0@gmail.com)

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PUBLICATIONS – YLA

YLA Formation inc. (YLA) publishes print books available in University bookstores.
They can also be ordered ONLINE in Canada –OR-- by MAIL & eMAIL worldwide.
Here is a description of 8 books already available in English, French and sometimes in Spanish.

DOING BETTER by doing differently TOGETHER: : Managing Business in the Aftermath of COVID-19 (3rd edition) / Yvan Lauzon, MBA. 2020-07. ISBN: 978-1989364369

This book introduces solutions to achieve a heightened degree of harmonious functioning of several generations of workers, operating within a stimulating work environment for the larger number by reducing the < Silo effect > for enhanced collaboration, with the five dimensions (Part 1 to 5) of CLIMB managerial approach (describes on website **www.climb.express**). The second section of this book presents the various COMPETENCIES required by the intervening staff that is: Senior Executives (P6), Managers (P7), and Project Managers (Project Leaders) (P8). The third section is about PERFORMANCE, proposing practical means to accomplish higher levels of performance (P9 & P10). The last three parts form section 4 COVID-19 offer a summary portrait of the historical evolution of the role of actors in organizations and society (P11), avenues for improving business conduct in the face of the new COVID-19 context requiring more than ever before: Resilience + Collective Intelligence + Agility & Innovation (P12) and, finally, a sketch of the organizational impacts of COVID-19 broken down into seven types of crises and presenting suggestions for actions for public and private organizations.

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Project Manager Roles & Main Skills Attribute : Competence Breakdown Structure (CBS) Model / Yvan Lauzon, MBA. 2018-10. ISBN: 978-1999410629

After a summary of all main researches related to Skills attributes required in Project management (PM), this book suggests a Competence Breakdown Structure (CBS) Model for Project Manager (Project Leader) to ensure a higher success rate and a better matching of needs and business functionality. This CBS Model is primarily designed to highlight the qualities most often responsible for strong Leadership (Skills; Functions; and Personal Characteristics of Project Managers imparting a distinctive Leadership). Overall, twenty roles are spread across ten categories, in four levels. This book also contains 3 listings of over 100 Skills attributes each, applicable to the most important persons in Project success: Senior officer acting as Sponsor (CEO, Ministers, and Deputy Ministers, …), Project Manager (PM) and Manager of the PM. Also included: 40 Skills attributes of great Negotiators (very helpful to better managing Stakeholder's relations); a listing of Best Practices in Management and 12 Survival Rules for Project Manager.

NOTE: An article from this trilingual book on Modeling was selected by a reading committee of the PMI FRANCE for inclusion in a French-language PMI book on Leadership, published in September 2020.

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Developing the collective intelligence in project teams (2nd edition)
/ Yvan Lauzon, MBA. 2019-01. ISBN: 978-1989364000

Experts are unanimous: Over 80% of senior managers consider teams to be the key to the success of their organizations. Teamwork is a constant challenge because it requires at all times effective collaboration between groups of individuals from different cultures (language, region…), professions, administrative units (i.e. Human Resources), cities (i.e. Toronto, Vancouver...), or even 4 or 5 generations (age strata). These challenges are sometimes magnified in the project teams. This innovative book addresses the characteristics of high-performance project teams, as well as new forms of project teams: virtual or delocalized, multicultural or international. This book also gives practical tips to better collaborate and ensure the sustainability of Lessons Learned (LL) in public projects.

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Let the Collective Intelligence of Your Work Team Break Out
/ Yvan Lauzon, MBA. 2019-01. ISBN: ISBN 978-1989364079

This innovative book addresses the characteristics of high-performance work teams, as well as new forms of project teams: virtual or delocalized, multicultural or international. This book also gives practical tips to better collaborate in Work Team. It includes the description of over 70 tools, such as: Methods / Techniques / Checklists / Software Features / Dynamic Forms that can be completed during Team Meetings / Etc.

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Managing Projects better, even Complex ones (2nd edition)
/ Yvan Lauzon, MBA. 2019-06. ISBN: 978-1989364147

In public organizations projects can be classified as: Simple; Complicated; Complex or Disruptive innovation project. Projects referred to as complex are mostly those in various business sectors such as: infrastructure constructions, public buildings, road systems and interchanges, bridges, large scale IT projects, Health care and the Military. Despite various opinions expressed about specific Public projects and further flashed and boosted ministerial press releases, a lot of these projects are not Simple or even Complicated, they are factually declared Complex …

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Multi-criteria Evaluation of Public Projects
/ Yvan Lauzon, MBA. 2019-05. ISBN: 978-1999461447

Public projects are often subjected to public opinion and media reporting and related pressure. We know about Auditors General filing daunting reports on post-mortem projects criticizing cost overruns, defective quality and functionality and undue delays. Department managers and political figures are called to account in the public place under difficult circumstances sometimes. This book covers the evaluation Project Management (3 criteria), but also the Business Solution Flowing from Project (5 criteria); Performance of the Project Team (5 criteria); Performance of the Project Leader (20 criteria) and also other criteria that we should never forget.

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Leadership Driven Project Management for Global Value (2nd edition)
/ Yvan Lauzon, MBA. 2019-07. ISBN: 978-1989364277

This work is dedicated to Leadership in Project Management with five typical cases:
Complex Projects; Intergenerational teams; International teams; Multicultural teams; Virtual Teams (Relocated or Outsourced). The emphasis is placed on the importance of Leadership in order to derive the most benefit from project evaluation to chart the best course of action for projects as well as the organizational maturity of Project Management.
Innovative concepts are also introduced touching on the *Global Value of Projects*, which under certain conditions can also be applied to other *current corporate operations*, private, public or association. Finally, this work includes a listing of *48 types of Value added* found in Project which can contribute to tangible organizational advantages under certain conditions highlighted in this work.

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Leadership, Change Management & Coaching : Crossroad Towards Digital Transformation
(2nd edition) / Yvan Lauzon, MBA. 2019-07. ISBN: 978-1989364291

Three main concepts form the basis of this book, which is addressing Digital Transformation leading to eCommerce and Electronic Service Delivery (ESD).

• Strong Leadership is needed to ensure organizational performance, sustaining the going concern in a fast changing and evolving world (VUCA).

• Digital Transformation is a defining era in terms of societal and historical development, requiring a management approach not uniquely reactive, given the multivariate nature of the issues involved. Those are largely the legal dimensions associated with Personal Data and Privacy Issues as well as other information resources, which must be protected.

• Most often Coaching Managers and Project Managers (Project Leaders) is needed to provide guidance and frameworks for heightened performance and also create an effective work environment and commitment of participants over the short and long terms.

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PUBLICATIONS – YLA

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