# Four Opportunities to Improve Your Project Portfolio Performance
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## Abstract

This paper explores four opportunities organizations can immediately seize to overcome a challenging economy, measurably improve portfolio, program and project performance, and increase organization effectiveness.

Most organizations today are looking for opportunities to "slim down." That includes all aspects of their organization, including operations, capital investments, and projects. Often, projects are the easiest items to delete or delay. More effective organizations, on the other hand, step back from the budget-cutting, and take a hard look at the value chain provided by their most-effective project initiatives.

IPMA-USA has developed and offers a suite of initiatives for organizations that are ready to improve the results of their portfolios. Alone or in combination, each opportunity has the potential to lower costs, reduce project challenges, increase success, and improve performance. For each opportunity, guidelines, tools and support information is available on the IPMA-USA website, as referenced in this paper's endnotes.

## Keywords

PM Training, Learning, Competence, Performance, Organizational Assessment, Competence Development, PRO, IPMA Delta, PM CompModel, Managers in the Middle.

## 1. Turn PM Training into Learning

Billions of USA Dollars have been spent in PM (project and program management) training over the last 20 years. Yet watchful Managers and Executives have seen little improvement in PM performance. How can this be? There are a range of reasons, about which we have written and presented[AB], but they can be summarized as the following:

- Training that is poorly targeted to the learners' workplace and project needs.
- An excess of short-term training, such as exam-cram preparation, that has a rapid learning decay curve.
- Training that is not soon-after applied on the job.
- Classic pedagogical (child learning) lecture-based training, rather than androgogical (adult) learning.
- Learners attending generic training, rather than training targeted to the organization's processes and culture.

These issues first became evident in the mid-1990s, when responding to a potential client's PM training request, one had to begin to ask, "Are you training to improve PM effectiveness, or just to pass an exam?" All too often the choice was the latter. And then they wondered *"Why can't Johnny manage projects?"*[C]

**Remedies:** Most of the remedies for the above common flaws are evident in their description. Indeed, any competent Human Capital (HC) professional (as the Human Resources discipline is increasingly called) could quickly and easily design the learning environment that assures that the right people obtain the right learning experiences, and that they apply them before the learning decay curve begins to take effect.[D] The result: Increased PM performance.

Unfortunately, in many organizations today, helpful Human Capital professionals are becoming scarce. This is quite a difference from the early 1980s, when savvy HC professionals eagerly directed enlightened Managers to the right learning experiences for their staff. Today, those few remaining in that staff group are spending most of their time in contracts, grievances and union negotiations (at least in America), rather than developing their human capital.

IPMA-USA, the American member association of IPMA, the International Project Management Assocation, is involved with a range of initiatives to improve the cost-effectiveness of PM learning in the USA, and around the World. Those initiatives include:

- Publishing guidelines for effective learning objectives[E], the best way to evaluate proposed post-academic training—and the best way to evaluate the performance-improvement results of that training back on the job.
- Forming the IPMA-USA Competence Enablers program to provide visibility and support for consultancies, PM providers and trainers who can "demonstrate the Competence Difference!"
- Focusing PM learning on **competence-enhancing content**, based on the ICB, the IPMA Competence Baseline. This has far greater impact on true learning and development, rather than using only knowledge standards.
- Working with Colleges and Universities to align academic PM learning to that same ICB.
- Establishing SCiPM, Student Certificate in Project Management, to build a foundation from IPMA's ICB.

Are these remedies working? It is too soon to tell, but clearly, the USA market is getting the word that relevant project and program management training *must* be delivered—and applied, or the buyer is wasting their money.

## 2. Assure Stakeholder Competence

Assume we seize the just-discussed first opportunity, and all organizations, including yours, demand relevant, competence-building, applicable-to-the-job learning from all PM learning investments. That opens the path for this next opportunity: More than just your project and program managers must demonstrate competence in their PM roles.

This significantly expands your target audience. As shown in Figure 1 below, *every key stakeholder*, including project sponsors, resource managers (who make the prioritization and assignment decisions), PMO consultants, traditional PM roles, and project team members, must demonstrate competence in all the actions required of their roles.

And if they do not, the PM is handicapped; after all, even cannot cure the disease of her or him. *The project is only*

crippled, or at least, severely the super-competent PM incompetence in those around *as strong as its weakest link*.

From the time of our founding offered the PM Competence identify the competences listed in Figure 1 at center. IPMA, and to Member IPMA World Congress in day session to Young Crew their own copies of the presented it in a session in the

in 2001, IPMA-USA has Model (PM CompModel) to needed in each of the roles We have made it available to Associations. At the 2006 Shanghai we presented a half-participants. They received automated tool, and we also Congress.



Figure 1: PM CompModel Helps Assess Key PM Roles

We developed PM CompModel in individual competence

long before 2001; we have used it assessment and competence

development planning since 1983. What changed in the early 2000s was that we realigned it to ICB, the IPMA Competence Baseline, which made it much more effective.
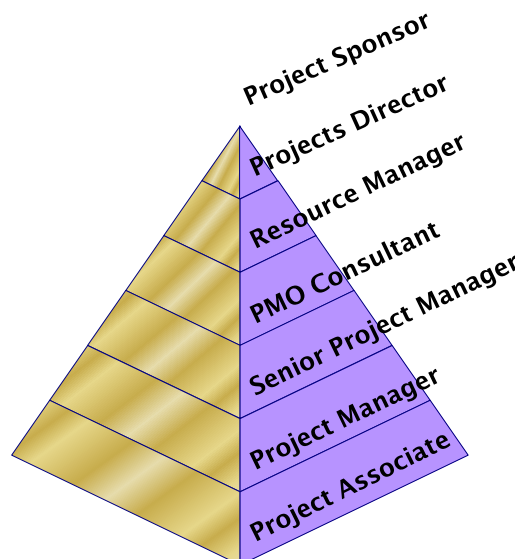
We made a PM CompModel version available to all IPMA Member Associations as part of our 2006 Shanghai World Congress paper presentation.[F] Interestingly, other non-IPMA societies have downloaded

PM CompModel, and tried to develop their own version. They have a challenge: Their baseline is knowledge-based; and knowledge is only the bottom rung of our PM Performance ladder, that spans knowledge, skill, attitudes and behavioral attributes (such as leadership and interpersonal skills), competence, and the ultimate results indicator, PM Performance.

So what do you do with the outcome of a PM Competence Assessment? You establish a PM Competence Development Plan, with actions prioritized by the role (some are more important than others), impact of the competence gaps, and responsibilities for assisting each learner to fill the gap. It should now be clear why these "Four Opportunities" are somewhat in sequence. If you send the learner off to YAWT, *Yet Another Worthless Training*, it may appear that the competence development process is flawed. On the other hand, effective and targeted training does play a key role in competence development. One must understand, though, that even effective training merely plants the seed. The true learning and development happens in the supportive workplace environment.

## 3. Focus on the Managers in the Middle

Some organizations have concentrated on improving their PM effectiveness for over 25 years, and many of them can measure their gains. But the vast majority of organizations have not yet seized the greatest opportunities for massive improvement. What could be missing? There are several factors that may not be obvious to all. One such factor is the effectiveness of *Managers in the Middle*: Typically, those in the range between two levels up from the project managers and team members, and two levels down from the top Executives. See Figure 2 on the following page for an organization chart segment showing *Managers in the Middle* in a medium-sized organization.

In large organizations, these Managers are the ones who explain, translate, where needed, and support Executive vision and strategy; they enable ongoing operations, while dealing with the integration of project-driven changes; communicate upwards the project teams' resource and funding needs; compete, collaborate and communicate with other Managers across the organization; prioritize competing operational and project activities; and evaluate and demonstrate the lasting benefits of successful project and program efforts. They are the differentiating advantage for their organizations, whether commercial or governmental. They inspire their project teams, demonstrated visionary leadership, and help their Executives to always appear to be brilliant.

*Or, they don't!*  In **some** cases, they have been promoted from their levels of former competence, and are now the barriers to communication throughout the organization. In other cases, they just do not realize that one manages a project organization completely differently than one manages a classic process organization. They starve their projects of resources, focus upon headcounts rather than specific talents, respond slowly to actionable project issues, and fail to take responsibility for project success. In organizational improvement consulting engagements spanning 28 years, we have seen far too many instances of this syndrome. Even within an organization, it is clear which are the ineffective Manag*ers in the Middle*, and which are the shining lights of managerial project effectiveness.

We perform organizational assessments in project and program management as part of methodology improvement, or for individual or team competence development. We often find that one limiting factor in individual performance is the relative health of the environment within which that individual operates. And remediation often includes a combination of Executive and Management assessment, together with individual coaching of certain of the layers of *Managers in the Middle*. Of course, this type of remediation is not the top priority of these very busy and important people.

*Case Study:* Twenty years ago, we worked in an organizational effectiveness initiative at a major oil company. This was a far-reaching PM Performance Improvement Project, and we stated to the CEO that the type of organization cultural transformation needed would require *one year for each level* between the Executive suite and the individual project team members. He (in this case, a male) started counting on his

fingers, to determine how many levels, or years, that would require. Running out of fingers, he said, "I know how to cut three years off the duration."

Note that this was already an industry-leading organization; it had great Managers, and a great reputation. But he saw the need to keep improving, and he saw that improving the effectiveness of the some of the *Managers in the Middle*, either by improving their effectiveness, moving them elsewhere, or simply removing those who were barriers to project success, was his best approach.

We performed a series of assessments with Managers, Project Managers, and Team Members. We developed and delivered an intensive 3-day workshop, officially called *Managing Project Managers*. Its unofficial name was *Up, Down, or Out*. Our initial assessments showed that many of the Managers had been promoted because of their excellence in their prior roles; some were not happy with their new responsibilities; some were incredibly effective; a few were just holding on until retirement.

In these workshops, Managers were exposed not just to more PM theory, but *what Managers do to improve PM performance*. They could demonstrate how they added value to everything they touched. If they could not show their value-add, they could move back down, at their current pay rate, to their former level of excellence. Some actually took early retirement. Some, who not only demonstrated clear value, but who did so despite weak Managers above them, had the opportunity to move up.
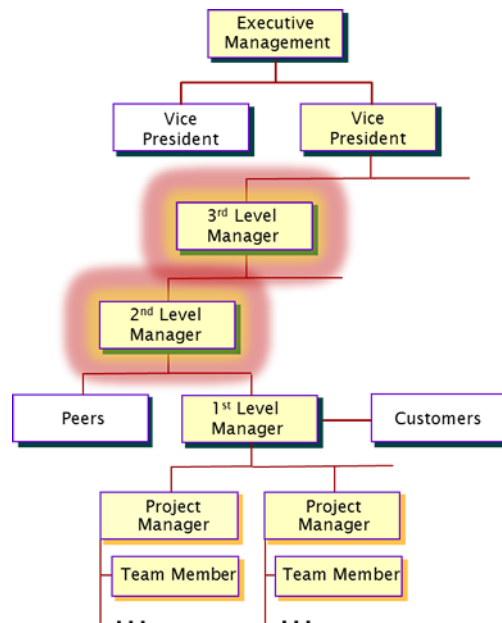


**Figure 2:** The *Managers in the Middle* (from Stacy Goff)

The organization did cut several layers of middle managers. More importantly, they improved *all* their performance. That was a pretty drastic approach to improving PM Performance. Most organizations don't have the stamina to go through a transformation that extensive. Yet for that organization, it was incredibly powerful, both for the individual Managers involved, and for the whole organization.

The key lesson from this case study is this: At a certain point, when you appear to be hitting the point of diminishing returns in PM Performance, look higher. There is easily another doubling of performance improvement that is available for you, by improving the effectiveness of your *Managers in the Middle*. Is always it possible to increase the PM effectiveness of the *Managers in the Middle*? Absolutely! Many of us have been doing this for years.

**IPMA-USA's Certificate in PM for Managers:** Two years ago to our Board initiated a program to develop a workshop and certificate for these Managers. This program is a key step in organizational PM improvement, because it directly addresses this issue of managerial effectiveness. Last Spring, IPMA-USA team members completed the pilot training session for the workshop. More work remains, including completing an exit exam, but the participants were excited about the workshop, and confident of the need for it. **CCiPM**, *Complementary Competence in Project Management* is a certificate, ***not*** a certification. We address the differences in a posting at the IPMA-USA website[G], because far too many in the PM training market call their offerings certifications when they clearly are not.

The **CCiPM** Manager's certificate is issued by IPMA-USA, not by our Certification group. In that way it is very similar to our SCiPM program, *Student Certificate in Project Management*, offered to Universities and their students to help align them with the performance-improving IPMA Competence Baseline,

versus using a basic knowledge taxonomy as their foundation. More information about these programs is available on the IPMA-USA website.

## 4. Assess and Improve Organizational PM Performance

A reminder: The PM Performance Improvement opportunities we list are somewhat cumulative and sequential. While an organization could investigate and implement them in any combination and sequence, they gain maximum results by considering them in the sequence we provide them. And this brings us to Assessing and Improving Organizational PM Performance. There has been a significant increase in interest in this area, as the "Maturity Model" approach has been adapted by many project management assessments. Today, there are hundreds of PM maturity models available. Most are proprietary, most provide value, and most keep consultants gainfully employed.

This paper discusses two new organizational PM Assessment models, one developed by IPMA-USA, and one developed by IPMA. Other IPMA Member Associations, such as GPM (Germany), APM (United Kingdom) and AIPM (Australia) also have their own useful and effective models.

*About PRO: I*, the **Performance** a multi-year effort of project assessors. William Duncan, the PM Body of Knowledge and our assessment model, and used it in his the driving need for an IPMA-USA prototype for our assessment. We ease-of-use, and ease of learning. We a standard—ideally, an open, versus

We looked at a wide range of the Malcolm Baldridge award, and many of the project management did not need yet another maturity was unique, distinctive, and more PM Performance, the output and processes that *might* cause



**Figure 3:** *PRO* Performance

**Rated Organization** standard, is the result of managers, consultants, and organizational primary author of the original Guide to the Certification Chair, had built an organizational practice for years. Based on a discussion about process, we made Duncan's model the identified additional requirements, including decided that it was important to assess against proprietary one.

standards, including quality standards such as various ISO standards. We carefully reviewed maturity models—and decided that the market model. Instead, we wanted an approach that useful. Ideally, the model would focus upon Executives desire, rather than all the inputs beneficial results.

Not finding a model or framework that worked for our needs, we built our model, ran it through the Standards process, published an Exposure Draft, and collected comments. We published the PRO Standard with five units of PM Performance, as shown in Figure 3. It is an open source, easily downloadable resource. Today, with our addition of trained Recognized Assessors, we can position PRO as a framework for self-assessment, professional assessment, and, *actions for performance improvement*.

The essence of PRO has been constructively applied for nearly three decades, so we benefited from our team's massive practical experience. But because it is among the newest of today's PM assessments, we were also able to studying the strengths of the other assessments. Several key strategies came from our analysis of those strengths:

- *Elegant, Top-down (Executive-oriented) Model;* we felt that some available models were focused on the project manager's view of the organization, not an Executive's view.
- *Move beyond Maturity Models;* while maturity works well in many cases, project management improvements are more sensitive to a "weakest link" approach than a linear progression. A side note: One of today's CMMI Level 5 organizations *is now looking to improve results*[H].
- *Assess Performance* (results or outputs), not just inputs and processes; this can produce useful results, at significantly lower cost, with less time required from staff. A key parallel: IPMA-USA's advanced PM Certifications also assess Performance. Thus our assessment suite is consistent from individual to organization.

- *Foundation for Research;* open up our databases for qualified researchers to explore key project success drivers.
- *Open Standard;* learning from the popular Prado/Archibald[I] model, rather than producing a tightly-controlled, proprietary model, we chose to offer a freely downloadable open standard (the Assessor Guide is proprietary, and is only provided to those who pass Assessor training).
- *KISS: Keep It Simple, Silly;* we chose to produce a PM assessment standard that was easy to use, and easy to learn. The rationale: Not everyone will hire a skilled, trained professional assessor.
- *Engage Professional Assessors;* at the same time, we chose to develop a model that could easily be added to the repertoire of a wide range of assessors of other standards.

While IPMA-USA is focused on a USA audience for our PM Organizational assessment and certification, we have also received overwhelming interest and demand from outside the USA. This demand comes from organizations that recognize their PM improvement needs, and from consultancies and assessors who see value in our approach and in our business model. Fortunately, there will soon be another new alternative for these non-USA groups.

*About IPMA Delta:* IPMA Delta, IPMA's **Assessment of Organizations**, has taken a path that parallels PRO. As IPMA-USA began our PRO efforts, we offered to share our results with IPMA. The IPMA Board decided that while it was a good idea, IPMA had a few different needs. Thus began a parallel project to develop IPMA's IPMA Delta model. For three years, IPMA-USA and IPMA teams have been co-operating and sharing information about our separate initiatives. Interestingly, good requirements analysis on the part of the teams has led to two very different assessment models. The IPMA Delta model, with its goals shown in Figure 4 below, is for use either in Self-assessment, or in Third-party Assessment. Its three modules assess *Individuals, Projects*, and the *Organization*.

The *Individual* module Project Managers, Team using ICB3.[J] The application of PM and projects, using the IPMA Model.[K] This provides *Organization* Module organizational best practices in project

The benefits of IPMA's Organizations include a maturity or status of the and participants; a list of improvement; a high assessment cost and especially for with an accepted Model. An added to the IPMA Awards



**Figure 4:** The Seven Goals of the IPMA Delta Model; 2010.

assesses the competence of members and Stakeholders, *Project* module reviews the results of selected Awards' Project Excellence great synergy. And the assesses overall competence in a range of and program management.

Assessment of determination of the overall organization, the projects, follow-on actions for value of results for low (compared to other models), Europeans, consistency standard, the Excellence strength is the relationship program, which focuses

upon projects, and the ranks of experienced IPMA Assessors that are already available, and with significant amounts of experience scoring people and projects on IPMA's 10-point scale.

*Competing Forces?* Some have raised concerns about the potential for competition, or at least confusion, between the IPMA-USA and IPMA organizational assessment models. We are not concerned, because each has clearly different market positioning. What is most important is that both models complement the other assessment programs the organizations already offer, and both uniquely offer the opportunity for qualifying organization to go beyond PM improvement opportunities, to become certified as competent,
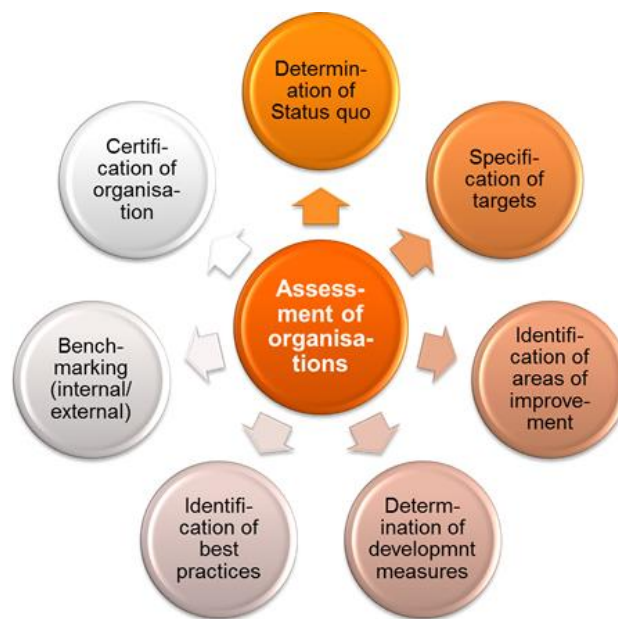
performing PM organizations. Every reader of this paper is a potential beneficiary of one or both of these assessments—if you are involved in projects and/or programs.

## 5. Summary

In this paper, we have identified four opportunities for every organization to consider, that can massively improve PM Performance. In a difficult economy, less-effective organizations cut back on their "discretionary" initiatives, while more-effective ones look at very-targeted ways they can further improve—and projects are the discipline of beneficial organizational and societal change. We present our four opportunities in sequence; while you need not complete them in sequence, you should *at least consider them* in the sequence presented. Why? Each builds the foundation for increased benefits for all that follow. And, embracing opportunities later in the sequence without seizing the earlier ones tends to increase the cost and reduce the effectiveness of your selected initiatives.

And here is another observation. Even after you have completed our *Four Opportunities* sequence, you are not finished improving PM Performance. Depending on the size of your organization, within a year or two you should re-evaluate each area of opportunity. This is the case for several reasons:

1. As you close your performance gaps, new gaps become more-evident.
2. New talent being added to your organization often has different competence development needs.
3. Enabling policies, processes, and procedures need to be reviewed regularly.
4. Promoted project managers who are now in manager-level positions especially require attention; we have addressed this in another blog post, *Most of What Got You Here is Wrong for Performing Here!*[L]

Note that providing consultancies with additional revenue is *not* one of our stated reasons. Each of the Four Opportunities presented in this paper have self-application methods and tools identified in their sections, or in additional material referenced in the end-notes. But if you decide that you would like guidance from professional associations, the contact information for IPMA-USA is also in the end notes.[M]

If you agree that improving PM Performance is a key strategy for dealing with today's challenges, we urge you to evaluate and apply each opportunity we discuss in this paper. And what, you may ask, is your potential gain? For organizations that have implemented the above combination of opportunities, our results show improvements that are 4x-10x measured performance over a 2-4 year period. ***Do you deserve to improve your PM performance?***

## About the Author

**STACY A. GOFF**, *the PM Performance™ Coach*, has coached and inspired tens of thousands of project and program managers, and hundreds of organizations, on five continents, for over forty years. A Project Management practitioner since 1970 and consultant since 1982, he has also been a strong contributor to professional organizations such as IPMA® and PMI® since 1983.

He is a co-founder and past-president of IPMA-USA, and 2011-2014 Vice President of Marketing & Events for IPMA, the International Project Management Association. In September, 2015, he was named an IPMA Honorary Fellow.

Goff's interest in project competence and performance began with establishing a PM Competency Center for a nuclear power plant in the early 1980s. It continued with international engagements during the 1980s and 90s as he helped organizations assess and improve their project and program performance. Today, he coaches, speaks and performs keynote speeches at

major project-related events. And, he continues to pursue his interest in individual, project team, organization, and national and international PM performance.

Mr. Goff brings a results-oriented approach to Project Management coaching, consulting, and training. His insight for the needed PM Competences, and his delivery of effective training translate to improved project performance. In his working life, he combines his Project experience with sensitivity for the interpersonal skills areas—the human aspects of projects.

In his papers, presentations, workshops or in consulting, he combines his project experience with strategic linkage for all projects and programs. His insights and experience have provided competitive advantage for his clients for over 40 years. His business result: measurably increased **PM Performance.**

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[A] Two examples: S. Goff (2006), *Let's Cure the Dumbing Down of Project Management*, www.IPMA-USA.org/articles/TheDumbingDown.pdf. S. Goff (2009),

[B] S. Goff (2009), IPMA Expert Seminar, *Improving PM Performance in the Classroom and Beyond:* www.IPMA-USA.org/articles/expsem_Goff2009.pdf.

[C] "Why Johnny can't manage projects" refers to problems in American schools, citing, "Why Johhny can't read".

[D] For years we have proclaimed that six weeks is the half-life of classroom learning if it is not applied. Recent assertions are that it is two weeks. See J. Medina (2008), *Brain Rules*; Pear Press (Seattle, Washington, USA).

[E] S. Goff (2010), *Demand Better Instructional PM Learning Objectives*, www.IPMA-USA.org/articles/BtrLearningObjs.pdf.

[F] S. Goff (2006), Shanghai Congress: *Distinguishing PM Competence in Training and Development, Organizational Assessment and Certification*.

[G] S. Goff (2010), *Is Yours a PM Certification or a Certificate?* www.IPMA-USA.org/chgagentis-yours-a-pm-certification-or-a-certificate/.

[H] The Ogden Air Logistics Center, 309th Software Maintenance Group, at Hill AFB was an early CMMI Level 5 organization. They now say they are *moving beyond CMMI Level 5* to **improve results** and customer satisfaction. Thus the first of the maturity model high-achievers realize that beyond maturity is performance, the same conclusion IPMA-USA came to three years ago.

[I] MCPM, the Maturity by Project Category Model, by Darci Prado and Russ Archibald, uses Russ's unique Project Categories. Very popular for PM research, It can be seen at: www.maturityresearch.com/novosite/en/index.html.

[J] ICB is the IPMA Competence Baseline, the foundation of IPMA's basic and advanced 4-L-C, Four-level Competence-based Certification of PM roles. See: www.ipma.world/certification/competence/ipma-competence-baseline/.

[K] The Project Excellence Model is the basis for IPMA Awards, providing great synergy between two IPMA programs, Awards and AoO. See: www.ipma.world/awards/project-excellence/.

[L] S. Goff (2010), *Most of What Got You Here is Wrong for Performing Here!* www.IPMA-USA.org/chgagent/most-of-what-got-you-here-is-wrong-for-performing-here/.

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