

White Paper: Effective Stakeholder Engagement for better projects

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A fundamental question

I wonder if you can guess the number one question asked on the Association for Project Management (APM) website. The answer may surprise you. It is:

“What is project management?”

You could be forgiven for expecting a somewhat deeper question. However, perhaps this question is deeper than we might first think. To those of us who have spent years in the profession practising the management of projects and/or teaching about it, I wonder whether we have landed on the best answer.

Of course, there are time-honoured stock definitions, book answers. But there is a lack of consensus about what project managers should actually do.

I am coming to suspect that this is because the best kind of project management is not what we have traditionally focused upon.

Early training experiences

The first project management training courses I attended were not dissimilar from what many other project managers experienced then and still do now. As a class we were shown the ‘golden triangle’ of time, cost and scope, and that quality emerged in the middle of these three somewhere, mostly by specifying requirements closely and clearly at the beginning.

The central job of project management was to plan, monitor, control and balance time, cost, and scope towards achieving these requirements. We learned about the network of activities in a project, how to draw these as a diagram, how to define the critical path through this network and why this was important.

We were shown calendar-based plans called Gantt charts¹ and then given software that could model and generate these networks, paths and charts, and we were supposed to manage our projects by these software tools.

Heresy creeps in

Over the years I led mostly technology-based projects. Given the choice by my client, I lapsed from creating Gantt charts; too many senior managers still don’t seem to understand them, like them or value them. And I didn’t generate critical path analyses either. It’s just that they didn’t seem, well, that critical anymore².

Also I began to give up on the mainstream project planning tools because I realized a paradox: I seemed to spend more time servicing the tool, filling in and updating all those terribly important data fields, than actually managing what I began to appreciate as the real project. In fact, people on the project kept stopping me while I was planning their projects. I was left feeling rather like a grumpy teenager being interrupted in the midst of their addiction to a computer game because it was a family meal time. I caught myself thinking something along these lines:

“If only my clients would stop interrupting me with new requests and issues, so that I can finish my plan. Then everything would be all right somehow...”

As with the TV character, Basil Fawlty, I almost believed that life would be alright without the customer!

“In the past, projects tended to be technical challenges; now most have a significant business change element.”

In the past, projects tended to be technical challenges; now most have a significant business change element. This means that the critical success factors change and what is needed from project management is different. Yet I’m sure not all project managers are conscious of this.

Like priests in a religion, we can follow the rituals where the meaning is no longer clear or relevant. There is still so much legacy tradition in our profession. There are still courses and curricula that major on the same old sacred cows and incant the same professional liturgies. They still plod through seemingly endless lifecycle phases of analysis, planning, governance and specification before actually closing to do anything. At project management exhibitions the vast majority of stands are selling software planning tools of greater and greater sophistication; this reinforces the myth that planning using such tools must be our main preoccupation. Actual execution seems to recede into the distance.

The CHAOS report from the Standish Group is still as dire each year about the number of failed projects³. It’s clear that much of what we do isn’t working. So here’s the heresy: perhaps we have given too much attention to planning, analysis and documentation, rather than attend to exploratory conversations, prototypes and execution.

There are more and more heretics like me, fellow refugees from project orthodoxy who seem to have discovered better ways of managing projects in ways that meet or even exceed customer expectations. The outbreak of various Agile approaches in recent years has been just one expression (not the only one) of a growing impatience and lost confidence that conventional approaches to project management will ever get on and deliver to the customer.

1 I only discovered years later why they were called Gantt Charts. They were named after their inventor, Henry Gantt in the early 20th century. I believe this is significant. They were regarded as so staple, so mainstream, that it seemed no one questioned them or the situations in which they were appropriate.

2 I am convinced ‘resources’ - which usually means people and their skills in the type of projects I deal with - are much more critical in their scarce availability than the logical dependencies identified by the critical path.

3 See <http://www.cafe-encounter.net/p1183/it-success-and-failure-the-chaos-report-factors-for-an-interesting-commentary>.

APM BoK and Competence Framework

So what should be the most important areas of attention for project managers?

One approach to getting this answer has been to add bits to the project manager’s play book. Much work has been invested into creating ‘bodies of knowledge’ or BOKs, the attempt to document in one place the sum of all project management knowledge. A BoK might be described as the summation of ‘everything you wanted to know about project management, but never dared to ask.’ APM has one. It is very comprehensive; it is illuminating; in fact, it makes me feel very inadequate in places. But the BoK is comprehensive in the way a catalogue of a hardware store is comprehensive, with tools in it that I know I will never need to use. Also it can seduce me back into thinking that the profession is largely an intellectual exercise: learn enough and I will be successful.

Then there is the Competence Framework. This prompts us to consider actual practice and it defines what levels of mature practice might look like. It is a really useful encyclopaedia of knowledge, skills and ability that you can use to assess yourself and others. There is much of value in the Framework. I regard it as one of the best contributions coming out of the APM. Within the Framework are some real insights into the skills, practice and experience required to manage projects of all kinds. It is clear that the Competence Framework embodies a rich community of practitioner experience.

The difficulty with the Framework is that it too is big. Like the BoK, few, if any, use all of it. Most select certain competences.

I believe the problem is not so much with the concept and contents of the Framework as it is with its form. The Competence Framework is in the form of a book with linear listings of three major sections and lists of competences within them – a good design as far as it goes. However, this means that, for a casual reader, those that come first grab their attention. And what comes first is the technical domain, and that domain is logically arranged according to the lifecycle sequence. Thus the reader might tend to weigh these early elements as more important.

It begs other critical questions: which areas of competence are the most important? And which ones should we develop first?

What high performers prioritize

Several years ago, pearcemayfield researched into the behaviours and thinking of high performing programme and project managers⁴. We discovered that, significantly, high performers consistently used a quite different set of priorities as observed in their behaviours, the choices they made in using their discretionary time, and from what they confirmed in interview. They tended to put a premium on two areas of practice in particular that were under-emphasized by the majority:

1. **Leaning to people**, key people; and
2. **Leaning to action**, prioritizing execution on a considered risk basis.

These two practices are related, of course. Our conclusion was that the high performers achieved their superior results and positive regard from their managers and their peers largely because they weighted these two elements as of first importance.

4 <http://www.slideshare.net/Patrick58/engaging-your-stakeholders>

The Value Ladder

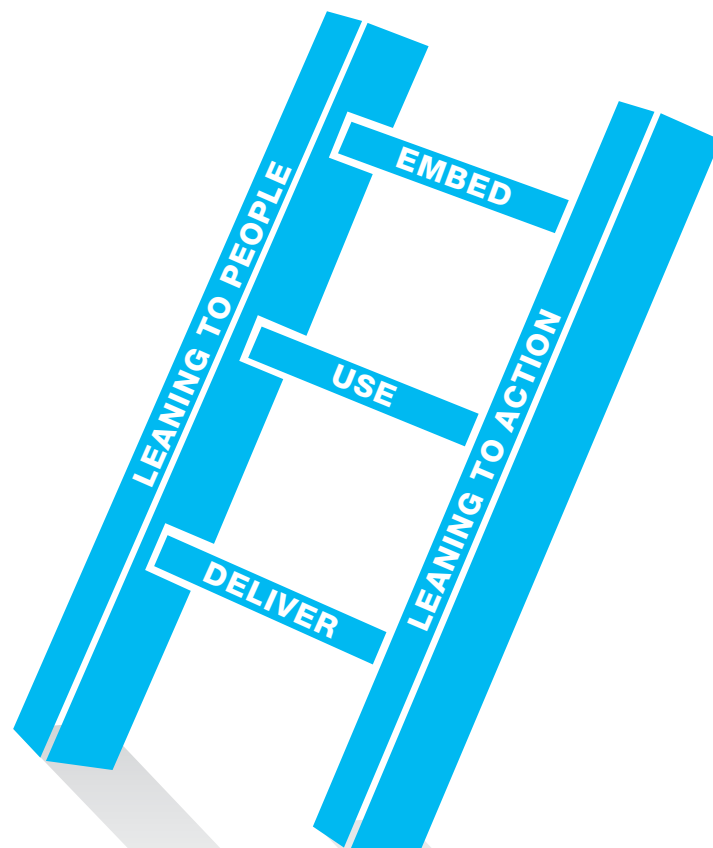
Elsewhere ⁵, I have presented these two key behaviours as the two supports for the Value Ladder.

The steps on the ladder represent key milestones in the life cycle of every project-enabled business case: **delivery**, outcome from **use**, and **embedding** use into routine, enduring practice. Note that this is not the same as the life cycle for every project; few projects can be justified to extend beyond final delivery, but the customer journey to benefit realization does not end with delivery.

On this simple model hangs everything in the change agenda of traditional or agile project management. Using this ladder as our frame of reference, we can contextualize subject areas such as governance, programme management, risk management, benefits management, etc. within the context of this ladder.

For example, portfolio management can use this simple model. I can envision a time where portfolio dashboards and reports have, in addition to RAG status, DUE status (Delivered, Used, Embedded).

5 *Practical People Engagement: Leading Change through the Power of Relationships* (Elbereth Publishing:2013)



A brave new world, or a new world where we must be brave?

More and more we seem to live in a VUCA⁶ (Volatile, Uncertain, Complex and Ambiguous) world. The days of steady state and stable external contexts seem for many of us to be long gone. VUCA has become the 21st Century “new normal”, it seems. Even if our customers are intelligent, willing, clear and present, they cannot seem to anticipate major strategic drivers that hit them during the life cycle.

In this context, complexity theory is becoming more relevant to business. As applied to organizations it considers how organizations adapt over time. It's very title is daunting; we'd rather have less complexity in project management, thank you very much.

Traditional, casual, linear modelling can be so descriptive in that we are wrong more often than we are right...

But complexity theory has much to offer us. For example, complexity theory suggests that one valid change strategy is to ‘poke’ the complex system and discover what really happens. Traditional causal, linear modelling can be so deceptive, in that we are wrong more often than right, such as with top-down estimating.

However, taking action, some careful step, even a small step, can give us surprising, and sometimes encouragingly helpful, data. It may encourage us to take another small step in that direction, or adapt, and so on. From what we have observed, this is what our high performers do. They courageously lean towards action, taking cautious steps, not recklessly, not aimlessly, but they regularly poke the system and adjust accordingly. They take considered action-oriented risks.

6 I first heard the acronym ‘VUCA’ explained in a strategic military context by Colin Powell at a Leadership Conference a few years ago. It has since been referenced in business contexts.

The project as a relational enterprise

Allied to that, high performers lean into relationships with people. For them, stakeholder engagement is not merely a marginal, cosmetic, ‘touchy-feely’ add-on to the more reliable and respectable parts of their professional kit bag of competences. For them, it is where they stand or fall in their effectiveness, in their ability to make change happen as a project through their relationships with key people around them.

They look at a project quite differently. They see their social skills as key. Their reaction to the enormity of engaging with lots of people is to lead, mobilise and coordinate the engagement effort first through a close group of stakeholders. They realise that unless other key players come on board, it just won't scale. Even as high-performers, they seem to move beyond the false idea of the individual hero project manager. “I can't do this on my own. I need help,” they say. So they influence and lobby to get that help.

The high performer understands that a project is so much more than a finite set of tasks and processes, but is a social enterprise of a temporary organisation that won't work or scale without the involvement and alignment of others and their efforts. As such, it must adapt and adjust as new information comes to light.

So taking the two skill sets together, a valid step for such a manager might be to “walk across the room”, to another important but strange individual, group, division or silo, and ask pertinent questions in an empathetic manner. This might mean breaking a cultural taboo within an organisation (“we don't talk to them”), but it is considered courage that make things happen.

A future entry-level curriculum

What we now call “Stakeholder Management” will become of first importance as we induct trainee project managers in the future. We can be confident that everything else they need to learn can be gained within the early context of appreciating and developing these two fundamental skill sets: pro-activity and interpersonal skills.

“...the humble conversation becomes a conscious, legitimate tool of better analysis, influence and project management.”

“**Stakeholder Engagement**” is a better term⁷. The novice project manager will learn first that such engagement is not merely broadcasting news, but prioritising key players, learning their wants, needs, and preferences and adjusting her interventions accordingly. She will learn that the simple conversation, purposefully undertaken, with practice will make her more skilled, effective and successful in meeting her customer's brief. And so the humble conversation becomes a conscious, legitimate tool of better analysis, influence and project management.

If an apprentice project manager then needs to produce a critical path then they will be able to validate this with appropriate stakeholders, they will learn its use in the context of who matters and where the focus of execution in the next step needs to be.

7 It is a better usage if we consider that we can ‘manage’ things. With people though, particularly those over whom we have may have no line authority, we seek to understand, influence and lead them. All of these things are implied in ‘engage’.



"Stakeholder Engagement" is a professional training and certification scheme administered by APMG International.

Based on the publication *"Practical People Engagement: Leading Change through the Power of Relationships"* (by Patrick Mayfield, author of this white paper), training and certification helps candidates explore and develop the key competence area of identifying, influencing and leading key stakeholders.

Training and certification will be of significant benefits to those tasked with delivering results and benefits from projects, programmes and other change initiatives.

A global network of Accredited Training Organizations (ATOs) offer approved training services – assessed and accredited by APMG International – to prepare candidates for certification. Find them online at **www.apmg-international.com/AccreditedProviders**.

Find out more about the scheme at **www.apmg-international.com/StakeholderEngagement**.

Your Next Step

Thank you for talking the time to read this paper. Now, may I put a question to you? How will you 'poke' your system? What will be your next practical step? Consider something that will take you no more than 20 minutes and do it in the next 24 hours.

Some of the most successful knowledge workers I have observed work with their books open. They are learners. The encouraging conclusion from recent research⁸ is that we can learn and improve our interpersonal skills. With the right supervision and support I believe we can become more courageous and effective with practice also.

I encourage you to consider an accredited training course in Stakeholder Engagement to develop your skills in this critical area. Not only will training equip with valuable new information, techniques and best practice, certification will help you stand out in a crowded marketplace.

In addition, here are some suggestions for further reading:

- **APM Competence Framework**, The Association for Project Management (2008).
- **Jurgen Appelo, Management 3.0: Leading Agile Developers, Developing Agile Leaders** (Addison-Wesley, 2011).
- **Stephen Denning, The Leader's Guide to Radical Management: Re-Inventing the Workplace for the 21st Century** (Jossey-Bass, 2010).
- **Patrick Mayfield, Practical People Engagement: Leading Change through the Power of Relationships** (Elbereth, 2013).



About the Author

Patrick Mayfield is the founding director and Chairman of pearcemayfield (www.pearcemayfield.com), a UK-based training and consulting company specializing in programme, project and change management.

In 2013 Patrick published *'Practical People Engagement: Leading Change through the Power of Relationships'* and this has since been adopted as the core reference material for the APMG Stakeholder Engagement certification.

He is a regular speaker at conferences on topics such as project / programme management, mind-mapping, creativity and problem-solving.

Patrick was practitioner assurance on the management team that originally delivered the PRINCE2 method in 1996 and has kept a close association with the method ever since. He was one of four authors commissioned to refresh MSP ('Managing Successful Programmes'), leading to the 3rd edition that was published in September 2007.

Check out Patrick's blog - "Lessons of a Learning Leader" - at <http://pearcemayfield.com/blog>.

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