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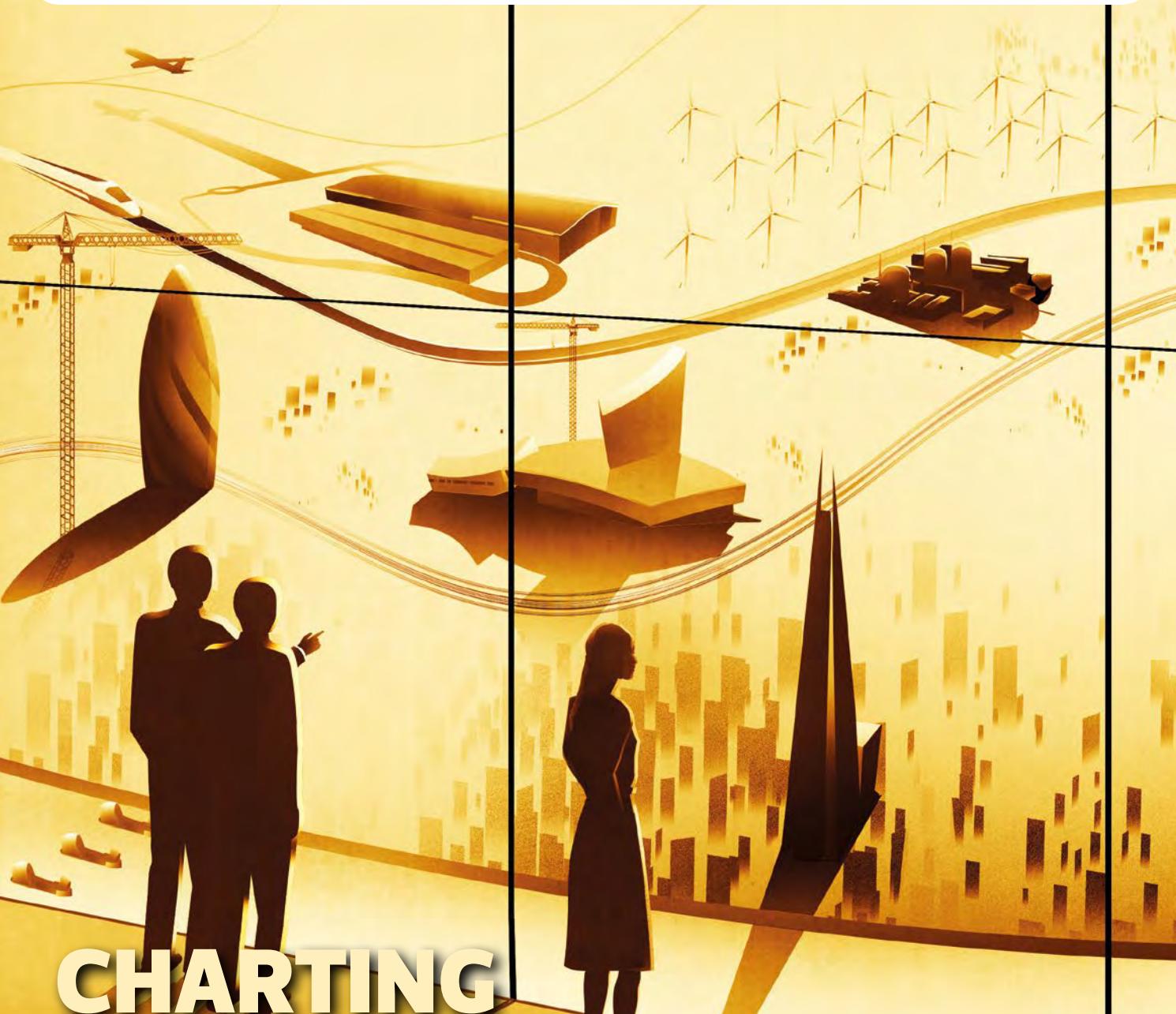
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Spring 2017  
ISSUE 290/£13.75

# PROJECT

the voice of the project management community



## CHARTING THE FUTURE

CELEBRATING APM'S ROYAL  
CHARTER AND WHAT IT  
MEANS FOR THE PROFESSION





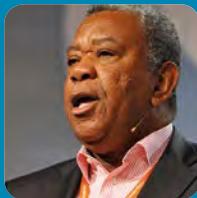
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17

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# Welcome

**It has been wonderful to start 2017 with the positive and exciting news that APM has received its Royal Charter. This is the culmination of a huge amount of hard work by many committed people, and a great step forward for the project management profession.**

Naturally, we are taking the opportunity to celebrate this achievement in *Project*. We reflect on the legacy that project management has had on the world around us, as well as how these skills are necessary to equip the nation to face the challenges of the future. In addition, a number of voices from APM and within the project management community talk about what achieving Chartered status means for them. Turn to page 24 to read more.

Many thanks for all your emails with suggestions for articles. As an editor, it is always gratifying to have such an engaged and responsive readership. Please do keep sending your ideas through. I am particularly interested in hearing about the projects you work on that reflect the importance of project management in our everyday lives – what we do, what we eat and what we consume.

Starting a series of project profiles around this particular theme is a look behind the scenes of the London Marathon. One of the world's largest mass-participation marathons, this event is an important part of the fabric of UK life. Turn to page 34 to read more.

The financial services industry has always been a vital aspect of the UK economy. With all the uncertainty swirling around about its status post-Brexit, we look at various aspects of the project management challenges in this sector in our special report, which starts on page 43.

Finally, this year's APM Project Management Conference will be held at London's Barbican on 27 April. Entitled 'Making the mould – transform, diversify, revolutionise', the conference promises to raise many fascinating issues about the need to adapt to our rapidly changing world. On page 38, one of the conference speakers, Christian Bason, talks about his vision of how design-led thinking can help shape public sector delivery.

Enjoy the issue. I look forward to receiving your comments and suggestions.



**APM'S ROYAL CHARTER IS THE CULMINATION OF A HUGE AMOUNT OF HARD WORK BY MANY COMMITTED PEOPLE**

COVER ILLUSTRATION: MATT MURPHY



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## PROJECT

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# KICK-OFF



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## Design a key priority for infrastructure

The National Infrastructure Commission (NIC) has promised to make good design a priority, stating that it is essential for infrastructure. This will be evident both in the Cambridge-Milton Keynes-Oxford study and the UK's first ever National Infrastructure Assessment.

Asked to consider how to maximise the potential of the Cambridge-Milton Keynes-Oxford corridor, the NIC found that a lack of sufficient and suitable housing presents a fundamental risk to the success of the area. Without a joined-up plan for housing, jobs and infrastructure across the corridor, it will be left behind by international competitors.

"Suitable" is key," said Phil Graham, CEO at the NIC, during a speech to the Campaign to Protect Rural England. "It means new housing and communities whose design recognises that each of these places is successful and attractive as somewhere to work and live in its own right.

"Good design is about more than aesthetics," Graham continued. "It is about delivering infrastructure



that works for its users, and for everyone affected by it."

To help with the study into the corridor, seen as a once-in-a-generation opportunity to create the UK's answer to Silicon Valley, the NIC has teamed up with 5th Studio, a spatial design agency based in Cambridge.

The NIC's study into the Cambridge-Milton Keynes-Oxford growth corridor will work with 5th Studio to address the lack of sufficient

and suitable housing, and encourage good design in infrastructure and housing in the area, based on international best practice.

"The NIC can't solve these problems in their entirety," said Graham. "Good design doesn't come from a 'black box' – it engages with those who use or are affected by the products and systems in question, whether that is an iPad or a new railway, and the homes and communities around it."

- *For more on how design can affect public sector change, read our interview with Christian Bason, CEO at Danish Design Centre, on page 38*

- *In related news, the NIC has become an executive agency with its own budget. The new body came into being in January 2017*

### COMMENT

**“**The NIC can't solve these problems in their entirety. Good design doesn't come from a 'black box' – it engages with those who use or are affected by the products and systems in question, whether that is an iPad or a new railway, and the communities around it**”**

**PHIL GRAHAM** CEO, National Infrastructure Commission

### NEW COMMISSION TO HIGHLIGHT 'GOOD WORK'

The Work Foundation has launched its Commission on Good Work, while inviting leaders in business, trade unions, professional bodies, and the public and voluntary sectors to join the 'Good Work' task force. The task force will drive the Work Foundation's strategy over the next two years, leading up to its 100th anniversary.

The Work Foundation describes 'good work' as a complex and evolving concept, which, by necessity, encapsulates the importance of productivity and skills needs, the consequences of technological innovation, and good working practices. The commission's objectives are to:

- understand what good work is;
- ensure that good work is at the heart of rebuilding the economy;
- secure sustainable improvements in productivity and social prosperity;
- understand businesses that are profitable through people;
- explore the careers of the future; and
- address the challenges and barriers to good work.

"Research findings repeatedly show good work is a critical way not only to enhance business performance, but also to drive social prosperity," said Work Foundation director Lesley Giles. "The launch of this new commission and a new strategic focus for the Work Foundation could not be timelier in light of the current political, technological and social climate."



OIVIND HOVLAND/IKON

## PM confidence in the future

Project managers are confident about the future of their profession and predict that project management will become a business skill that everybody uses, according to a study by AXELOS that examines how the profession will look in 2030.

Participants felt that project management will continue to grow as a life skill, with more than three-quarters (76 per cent) of those surveyed agreeing that it will become a basic business skill. In addition, 72 per cent said that project management will become a respected career choice and more professional, with a similar number (76 per cent) agreeing that project managers will become more specialised based on their industry.

The strategic role of project management was clear throughout the survey findings, with 90 per cent of respondents saying that professionals will need a stronger strategic vision for their projects that is aligned to the wider business.

Increased regulation and compliance will generate more projects by 2030, said 75 per cent of respondents. Ninety per cent agreed that new technologies will generate risks that need to be managed carefully, and 59 per cent said that, as automation increases, routine project management tasks will no longer be a burden on them.

The survey also reinforces the importance of agility in project management: 84 per cent of respondents said that agile will grow in importance. A large majority (90 per cent) agreed that ongoing training will be vital to keep up with the pace of change, and that there will be a need for more creativity and flexibility in project management.

### REGISTERED PROJECT PROFESSIONAL REFRESH

APM has refreshed its Registered Project Professional (RPP) standard in line with the *APM Competence Framework*, second edition, adding a route recognising achievement of the APM Project Professional Qualification or APM Practitioner Qualification.

The standard, initially launched in 2011, is awarded to those who demonstrate competence and professionalism throughout their project career. The high-calibre reputation of those who hold RPP has resulted in the standard becoming highly sought after by employers and organisations. The additional routes to gaining the standard seek to create a diverse pipeline of project professionals to ensure the industry continues to operate to the highest standards.

Gill Hancock, APM head of professional standards and knowledge, said: "Our profession continues to evolve, and the refreshed standard reflects this. By welcoming applicants from a range of pathways, industry will enjoy an invigorated, confident pipeline of highly competent project professionals who have demonstrated the renowned capability needed to attain RPP."

### AROUND THE UK

#### **WSP | PARSONS BRINCKERHOFF AWARDED HOUSE OF COMMONS CONTRACT**

WSP | Parsons Brinckerhoff has been awarded the programme, project and cost management role for the House of Commons' £650m northern estate programme (NEP). The NEP will refurbish a number of listed buildings on the Parliamentary Estate that house offices for MPs, their staff and House of Commons workers. In total, approximately 15,300m<sup>2</sup> of office space will be refurbished. Work is due largely to the age and fragility of the buildings' mechanical and electrical services, their poor environmental performance, and fire safety improvement requirements.

Completion of the work is expected in the early 2020s. The NEP is separate from the restoration and renewal programme for the Palace of Westminster, which is set to cost at least £1bn.



#### **RICS MEMBERS AIM TO INSPIRE THE NEXT GENERATION**

When asked about their wishes for 2017, members of the Royal Institution of Chartered Surveyors who are engaged in UK infrastructure said inspiring the next generation is at the top of their list.

As David Ferroussat, Heathrow's infrastructure procurement director, said: "I would like to see all construction-related professional bodies be more visible in their collaboration to create an innovative industry that can attract and grow the next generation of construction professionals."

Second on the list – unsurprisingly, perhaps, in the light of the Brexit vote – is 'to position the UK as a global player', while in third place is 'to be more creative'.

## AROUND THE WORLD

### ACQUISITION FOR CBRE

CBRE Group Inc has acquired retail firm Skye Group. Based in Ohio, and led by founder Bradley Sanders, Skye provides retail project management, shopping centre development and tenant coordination services in the US and Canada. The firm was founded in 2000.

Skye's client list includes Simon, Howard Hughes, Westfield, LaSalle and Vornado Realty Trust, as well as brands such as Barneys New York, so the acquisition bolsters CBRE's retail project management service offerings.

Sanders will lead CBRE's retail project management business and report to Mark Fewin of CBRE's project management services. The business will operate as CBRE | Skye.

### US HIGH SCHOOLS ADOPT PROJECT-BASED LEARNING INITIATIVES

Three US high schools have been awarded grants to continue teaching 21st-century skills through project-based learning (PBL) and project management. The grants, awarded by P21, the Partnership for 21st Century Learning, aim to increase awareness and advocacy for a common vision of 21st century learning; increase involvement by community members working with schools; and raise awareness and use of project management and project-based learning to prepare students for college, career and life.

David Ross, CEO at P21, said: "There is no doubt that bringing in PBL and project management to schools helps students develop the skills necessary to be successful."

**"PBL AND PROJECT MANAGEMENT HELP STUDENTS DEVELOP THE SKILLS NECESSARY TO BE SUCCESSFUL"**



GETTY

## National infrastructure plans published

The Infrastructure and Projects Authority has published a new National Infrastructure and Construction Pipeline, setting out more than £500bn worth of planned private and public investment. It is estimated that this represents a £38.9bn jump in the value of the pipeline since March 2016. It is predicted that 60 per cent of the total will be spent by 2020. More than half of the planned pipeline will need to be privately funded.

The pipeline follows the chancellor's autumn statement, in which a new £23bn National Productivity Investment Fund was announced. This includes infrastructure investments of more than £2.6bn to improve transport networks, a multimillion-pound package to accelerate the future of broadband, and £7.2bn to support housing construction.

Investing in better infrastructure is at the heart of the government's strategy to

close the UK's productivity gap. The pipeline ranks as the largest and most comprehensive ever and will help deliver local projects across the country, including transport, broadband, flood defence and housing projects. It also includes the Cambridge to Oxford expressway.

In addition, the government has published a new funding and finance supplement to help attract further private sector investment into some of the UK's most important infrastructure projects.

The hope is that publishing a pipeline will create financial certainty. KPMG's UK head of infrastructure, Richard Threlfall, commented: "Infrastructure investors and the construction industry will welcome having a comprehensive view of the spending plans of government and utilities, covering both social and economic infrastructure."

### GET ON WITH IT, BUT DO IT RIGHT

**76%**  
say that investment in infrastructure is vital to future economic growth

**60%**  
agree that we are not doing enough as a country to meet our infrastructure needs

**42%**  
support foreign investment if projects can be delivered more quickly as a result

**48%**  
agree that the UK has a poor record at getting national infrastructure projects right

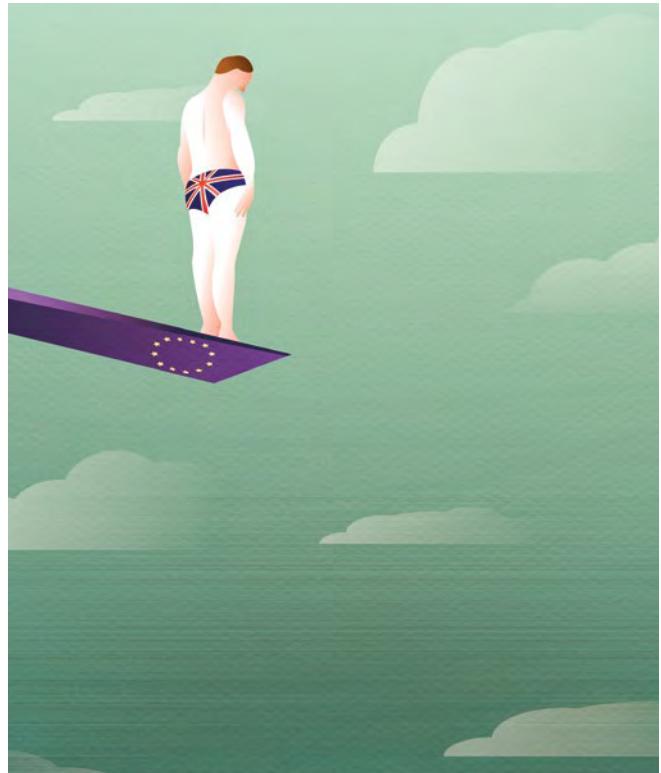
# Brexit effect still unclear

At the start of 2016, a survey by Smith & Williamson revealed that only 15 per cent of property and construction executives in the UK favoured an exit from the EU. However, construction growth reached a nine-month high in December 2016. The Markit/CIPS UK Construction Purchasing Managers' Index rose to 54.2 in December, with anything over 50 indicating growth. Employment rates in the sector have also increased after an initial freeze in employment, suggesting a more positive attitude in the industry.

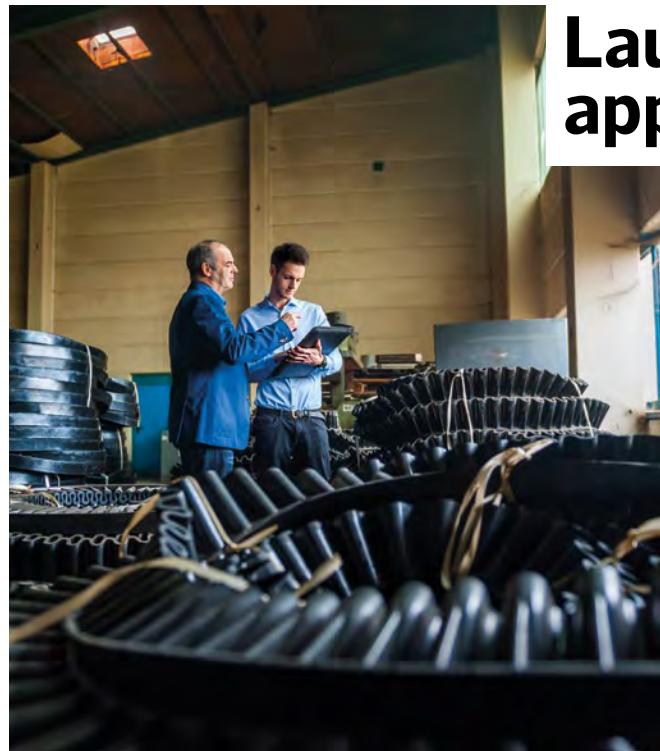
Despite the optimism, the growth rate is still slower than at the beginning of 2016. The weaker pound has also impacted the price of construction materials, with costs rocketing at the fastest pace since 2011.

There are fears over Brexit's effect on the workforce too. According to Arcadis, British construction stands to lose out on almost 215,000 workers from house-building and infrastructure projects in the event of a 'hard' Brexit – for instance, extending the points-based system currently in place for non-EU migrants. Arcadis estimates that such a scenario could mean that those EU nationals leaving the industry could not be replaced at the same rate by new EU workers. Even with a 'soft' Brexit, the industry could lose as many as 135,000 workers.

While surveys and data support both sides, the only clear conclusion is that there is still no certainty on Brexit's impact.



ALIX THOMAZI



## Launch of trailblazer apprenticeship schemes

A new standard for project management apprenticeships in England has been launched, following an event hosted at the House of Commons. Spearheaded by Sellafield Ltd, the 'trailblazer' project is the latest step in the government's plans to deliver three million new apprenticeships by 2020. The scheme gives employers a leading role in designing apprenticeship standards specific to job roles in their sector.

Over the past year, Sellafield, selected by government to act as a 'trailblazer' lead, has been working alongside the Department for Business, Energy and Industrial Strategy to develop project management apprenticeship standards as a way of growing the UK's project delivery capability. Other participating employers have included Rolls-Royce, Transport for London, Lloyds Banking Group, Balfour Beatty, training providers, qualification awarding bodies and APM, which has helped to develop the new and improved national project management apprenticeship.

The new employer-designed apprenticeship standards are short, easy to understand and able to describe the knowledge, skills and behaviours that an individual needs to be fully competent in an occupation. The new Qualifications and Credit Framework Level 4 standard meets the needs of aspiring project managers in any industry sector and is aligned to the APM Project Management Qualification.

## 90 DAYS IN THE LIFE OF...

*Project* meets Jennifer Hearne, project manager at Hyperdrive Innovation

**How long have you been in your current job, and what do you like most about it?**

I have been at Hyperdrive Innovation for 18 months, working on automotive electrification and battery energy storage projects at the company's base in Sunderland.

I enjoy the hands-on approach at Hyperdrive. I used to work in shipbuilding and power generation, which involved working on projects that spanned long periods of time. At Hyperdrive, the environment is more fast-paced, which keeps things interesting.

I also enjoy looking at the business strategically. I need to be able to understand the supply chain, engineering, manufacturing techniques and finance. Project management is organisational, but you also need to be able to keep people

on side. The human element of my job is the part I really like.

**What professional challenges did you face in the past 90 days?**

We are entering new markets with our customers. Many want to get to market quickly and be first adopters. Juggling this with the challenges of growing a small company and resourcing accordingly has been challenging, but it has also been exciting and rewarding to see the business transformation in this time.

**What is the most important lesson you have learned in the past 90 days?**

Time management. When you face challenging times, some basic principles get forgotten. I've been getting a lot of advice from a friend who works in HR. She has given me tips for going back to basics in terms

of prioritising tasks by their urgency and importance.

**What are the biggest challenges facing you in the next 90 days?**

Hyperdrive continues to grow and win new projects. My role is not only to ensure effective project management, but also to make sure we have the appropriate processes in place to support growth. I think it will be challenging in Q1 2017 to embed the changes that have started to be developed and rolled out in the past 90 days.

**If you could spend 90 days with anyone – living or dead – who would it be?**

Such a difficult question! I've been following the BBC's '100 Women' season; there are so many inspirational people. Could I spend a day with each of them instead?



### DIARY DATES

**14 March 2017**

Ethical project management: how to apply governance, manage the risks and gain the benefits, London

**23 March 2017**

Uncommon sense in project management, University of Cumbria

Changing focus... is an overarching approach to change the way forward?, Enabling Change SIG, London

**27 April 2017**

APM Project Management Conference, London

**11 May 2017**

Portfolio Management SIG Conference, London

For more information, visit [apm.org.uk/events](http://apm.org.uk/events)

## Upgrade to Antarctic facilities to keep UK at forefront of research

Research group British Antarctic Survey (BAS) has partnered with BAM Nuttall to modernise UK Antarctic and other polar research facilities.

Projects under the £100m partnership will include the redevelopment of BAS's Rothera Research Station – situated on the Antarctic Peninsula – which acts as a gateway for UK operations deep in Antarctica. An upgrade is required to accommodate the new polar research vessel the *RRS Sir David Attenborough*. BAM Nuttall has teamed up with European design consultant Sweco to assist with project delivery.

Commissioned by the Natural Environment Research Council, the

partnership programme – set to last from seven to 10 years – will enable a world-leading capability to ensure that the UK remains at the forefront of climate, biodiversity and ocean research in the polar regions. The Antarctic construction projects, which will include storage and living quarters, will present unique challenges. The continent is the highest, driest, coldest and windiest on Earth, and most construction work will need to be completed during the four-month window of the Antarctic summer. Construction workers will live and work alongside science teams in harsh and remote environments, sometimes in sub-zero temperatures.

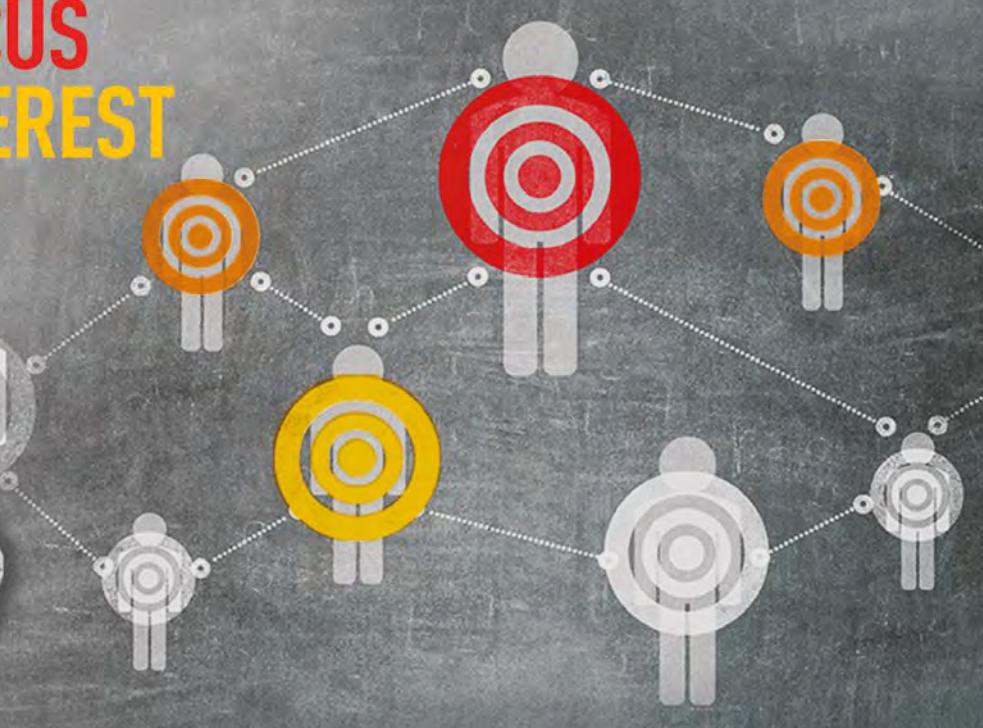




# Agile Business

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To find out more about this, and how you can get involved, visit [www.agilebusiness.org](http://www.agilebusiness.org)

# NETWORK

KEEPING  
APM  
MEMBERS  
CONNECTED

## Defining the future of project management

This year's APM Project Management Conference, to be held at London's Barbican on 27 April, will tackle some of the issues facing project management in our ever-changing world. Entitled 'Making the mould: transform, evolve, diversify', the conference will provide an insight into the future of the profession against the backdrop of a world where norms are constantly being challenged.

Chaired by KPMG's Sue Kershaw, the event will welcome headteacher Sir William Atkinson as its keynote speaker. Atkinson is recognised for his innovation and success in turning around failing schools. Other speakers include Maarten Kleinhout, managing director at Commercial Systems International, and Professor Jennifer Whyte, Laing



### THE CONFERENCE WILL PROVIDE AN INSIGHT INTO THE FUTURE IN A WORLD WHERE NORMS ARE CONSTANTLY BEING CHALLENGED

O'Rourke/Royal Academy of Engineering professor of systems integration at Imperial College London, whose research addresses the new opportunities and challenges facing major infrastructure projects.

In addition, there will be three discussion streams running throughout the day – new generation, new projects and new practice.

- **For more information and to book, visit [apm.org.uk/conference](http://apm.org.uk/conference)**

### APM 2016/2017 BOARD

Following APM's Annual General Meeting on 21 November 2016, the following board members were appointed:

- **John McGlynn** – chair
- **Alan Macklin**  
– deputy chair
- **Steve Wake**  
– deputy chair
- **Susie Boyce**
- **Dr Paul Chapman**
- **Alistair Godbold**
- **John Groden**
- **Stephen Jones**
- **Sue Kershaw**
- **Milla Mazilu**
- **Roy Millard**
- **Simon Taylor**
- **Brian Wernham**



## New Systems Thinking SIG created

A new APM specific interest group (SIG) has been created to promote and encourage the benefits of systems thinking to all projects, programmes and portfolios.

Systems thinking – making the link between every part of a project by adopting a different thought process – can help avoid problems, pitfalls and potential failure.

The Systems Thinking SIG is championed by APM's new chair, John McGlynn, and has been set up in conjunction with the UK chapter of the International Council on Systems Engineering.

Although systems thinking is not new – this 'mind modelling' technique has its roots in the world of engineering – until now, it has not been widely adopted and applied in project management.

"Systems thinking is a very productive way of looking at projects, programmes and portfolios," said McGlynn. "It gives you the ability to take a holistic view, understanding how all the constituent parts fit together and interact, so helping to better identify, mitigate or even avoid unintended consequences."

If any single part of a 'system' changes or fails, there is a knock-on effect on the entire project, he explained. Having the ability and skills to understand and identify the relationships between all the elements and the way they interact can prevent problems before they arise and can be a powerful tool for any project manager.

As well as avoiding unintended consequences, the better understanding of requirements, problems and solutions can lead to greater stakeholder engagement and

communication, enable better risk planning and mitigation, and improve reporting.

An awareness of systems thinking is valuable for even the simplest of projects. Developing a deeper understanding can be a real asset in managing complex projects, programmes and portfolios.

"I believe there is a definite gap in current project management practice, and we need to fill this gap and introduce systems thinking as a competency," added McGlynn.

The new SIG will be developing the application to project management and offers those who join the opportunity to keep abreast of current thinking, tools and techniques, enabling them to get the best from the approach.

- **To get involved, visit [apm.org.uk/community/systems-thinking-sig](http://apm.org.uk/community/systems-thinking-sig)**



## Awards for project management students

Two MSc project management students from the University of South Wales have been presented with academic prizes sponsored by the APM South Wales and West of England (SWWE) branch.

The prizes for best students of the year were awarded to Chidi Lawrence Ogbonna and Mabedi Letsholo at a special graduation ceremony held at the university's Treforest Campus on 15 December 2016. Allan Reid FAPM,

South Wales chapter co-chair, presented the prizes on behalf of the SWWE branch.

The university's project management master's programme is accredited by APM and aims to provide a deeper understanding of both the theoretical and practical aspects of a project, programme and portfolio management environment while developing the essential skills and professional competences to deliver successful projects.

### APM HONG KONG CELEBRATES 25TH ANNIVERSARY

More than 70 members and guests attended a special dinner on 19 January to mark the 25th anniversary of APM's Hong Kong branch. Held at The Hong Kong Jockey Club, the event had an enthusiastic atmosphere, particularly when branch chair Steve Root explained the recent award of APM's Royal Charter, which many guests were not aware of.

Participants celebrated the achievements of the past 25 years, including ongoing mega-projects in Hong Kong, such as the third airport runway, Mass Transit Railway extensions and West Kowloon Cultural District (WKCD).

WKCD is one of the world's largest arts and cultural projects, with a budget of almost \$6bn. It is set to become a world-class multi-venue hub for visual and performing arts. Guest speaker Duncan Pescod, CEO at the West Kowloon



Cultural District Authority, shared his experience in the planning, construction, and development of artistic programmes, and the thriving, ongoing local events and community engagement as part of this mega-project.

It is a branch tradition to donate the money raised from the raffle to a charity of the guest speaker's choice. The event raised around HK\$7,000 for the Children's Heart Foundation, which supports children suffering from congenital heart disease.

### NEW APM PUBLICATIONS

#### INSIGHTS INTO PROGRAMME MANAGEMENT

The recently published second edition of *APM Introduction to Programme Management* outlines the fundamental principles of this discipline and looks at how they are applied in the real world.

This comprehensive book discusses what programmes are, how they work and how to review progress. It also explores the changing environment in which programmes exist, and their relationship to the strategic context of organisations, frameworks and ways of working.

In the foreword, Sir John Armitt comments: "This update to *APM Introduction to Programme Management* brings new insights into what programme management is. It is an 'easy read' for executives, for those relatively new to programme management who have a thirst for knowledge, and for the project management community who should, and need to, understand how their project management skills play into the 'bigger picture'."

#### GUIDANCE ON CO-OWNED PROJECTS

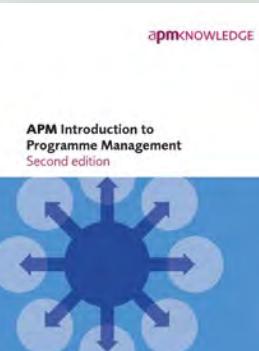
*Governance of Co-Owned Projects* is the latest guide from APM's Governance Specific Interest Group (SIG) and follows up on the group's earlier publication *Co-directing Change*.

Led by Dr Hartley Millar, one of the key members of the original team of authors, numerous members of the SIG contributed to the guide via workshops and study groups. Organisations that have experience in sponsoring or delivering co-owned projects conducted reviews.

Building on the previous guide's content, *Governance of Co-Owned Projects* is a direct response to the challenge of managing projects in an increasingly interconnected world where boundaries are blurring between government and non-government organisations; private and social enterprise; and communities and individuals.

Principles-based, the revised guidance provides probing questions rather than definitive solutions, and is aimed at board members or those who influence the board.

● Order the guides at [apm.org.uk/book-shop](http://apm.org.uk/book-shop)



# Partnering to deliver an integrated programme at AWE

A recent collaboration between defence contractor AWE and APM saw project management professionals from both organisations come together to share knowledge and best practice.

The interactive forum explored AWE's journey to establish a programme management office (PMO). In particular, it demonstrated how the PMO is supporting cultural change and engagement at AWE, and how it is working to remove barriers and create more integrated ways of working. Discussions also focused on the right level of decision making for programme delivery.

Presenters included AWE's director of programme, Graeme Nicholson, and director of programme and supply chain management, Joe Adams. They described their

commitment to delivering excellence in programme management at AWE while recognising the challenges and demands of operating in a complex technical environment.

AWE head of programme management office Andrew Nicholson said: "It was encouraging to note, from the large turnout, that we are not alone on our journey to an integrated programme managed by a PMO. The diversity of attendees has opened up greater opportunities for AWE to share with, and learn from, other organisations."

AWE head of profession for project management Bob Ward said: "Sharing with external people helped us gain a benchmark of our success and the questions posed were very insightful. I look forward to the future collaborations that this event created."



The team from AWE (L-R) Joe Adams, director of programme and supply chain management; Steve Teasdale, head of programme performance management; Andrew Nicholson, head of programme management office; Bob Ward, head of profession for project management; Graeme Nicholson, director of programme; Jeff Maple, finance & business management PMO representative; Carol Williams, head of supply chain management and acting head of programme management

**"SHARING WITH EXTERNAL PEOPLE HELPED US GAIN A BENCHMARK OF OUR SUCCESS"**

## Profile of an APM volunteer



Name: **David Cox**

Job title: **Head of project management, Thales UK**

Volunteer role: **Planning, Monitoring and Control Specific Interest Group committee**

### Why did you decide to volunteer with APM?

Having worked for Thales UK for 30 years, I realised I was in a position to give back to the community. My current role as head of project management includes monitoring, assessing and improving business project management governance activities. I now coach and mentor other community members.

My director gave me the opportunity to join APM's Planning, Monitoring and Control Specific Interest Group (SIG). The APM SIGs have an industry-wide, global reach, and give access to so many individuals with the drive to establish and share best practice.

### What benefits have you gained from volunteering?

I now see how other industries and businesses implement project management methodologies. My experience and knowledge continues to grow. I have further validation that the ways in which I have managed my projects are best practice, and I am able to share this with confidence with the community.

### Any advice for members looking to volunteer?

Think carefully about the branch or SIG you want to work with. If you work for a company, get sponsorship at the right level. Work with the SIG's chair to find the right interest area – then throw yourself into the group. It will be challenging. However, you will soon realise that you have much to talk about and many common goals. Remember, you are also there to enjoy yourself.

FIND OUT MORE

IF YOU ARE INTERESTED IN FINDING OUT MORE ABOUT VOLUNTEERING, PLEASE CONTACT [ANNA.GRABHAM@APM.ORG.UK](mailto:ANNA.GRABHAM@APM.ORG.UK)

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Some  
dream,  
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become



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# Your view



Please send your letters to editor@project-journal.co.uk  
Letters may be edited for publication

## SEEKING ASSURANCE BEST PRACTICE

I was delighted to see the *Measures for Assuring Projects* toolkit made available to members and covered in an excellent article in the Winter 2016 edition of *Project*. I have heard that the toolkit has been downloaded by more than 6,000 APM members.

As one of the authors of the toolkit, I wanted to share my experience of measuring assurance and to learn from others. We have started a blog and are hoping to arrange a number of discussion evenings around the UK to respond to members' interest.

The measures are based on a structure of 10 criteria. Within these, guidance is provided on what good looks like based on expert judgement and evidence. The group of experts who developed the tool blended expertise from a wide range of sectors, including IT, infrastructure, railways, manufacturing, and oil and gas, my own area of experience.

The 10 criteria for assurance cover all aspects of projects – from client and scope to governance. From my experience of oil and gas, the criteria fit very closely the way I have seen and practised assurance, though there are differences in the precise terminology used based on company and industry practices.

Larger companies with experience of projects will have their own framework for assurance, with terminology based on company and industry history and practice. However, the measures for assurance framework, along with the guidance to support assurance with judgement and evidence of best practice, can be a useful benchmark.

It would be great to hear about best practice from others, and suggestions for areas of improvement for the toolkit. Please check out the blog ([bit.ly/2kxhKkW](http://bit.ly/2kxhKkW)) to look out for events where we will be able to discuss the *Measures for Assuring Projects* toolkit, which is available to download at [bit.ly/2jj9TXq](http://bit.ly/2jj9TXq).

**Tim Podesta**



## LINKEDIN CAREER ADVICE NEEDED

### THE ISSUE

I'm trying to become a project manager. However, I have limited experience (although I have the foundation certification in PRINCE2®). Can you provide some advice

as to how I can boost my possibilities, please?

**Gemma Edwards**

### THE REACTION

Look at the APM *Competence Framework* – a self-assessment tool that enables you to plot

specific areas for development. You may find that you have the competences already.

**Jason McEwen**

Find a core skill/industry that you are interested in, then apply your project management skill set there. Having an understanding in

whatever you choose helps tremendously.

**Andy Ledward**

Look for project support or project analyst roles in the project function or project management office function. It helps you get some experience and, after one to two years, it helps as a

stepping stone to other project roles. As a starting point, get familiar with managing Risk, Assumptions, Issues and Dependencies (RAID) documents, putting together plans, and practising breaking down pieces of work into manageable packages.

**Mignon Mapplebeck**

## ONLINE REACTION TO APM's ROYAL CHARTER ANNOUNCEMENT

That is very good news and a great start to the year.

**Christine Majella Kennedy**

a profession. Congratulations to all involved.

**Mark Robinson**

Excellent news to finally be awarded the Charter. Well done to all involved.

**Iain Paterson**

Great news for APM and all those working in the project management profession. Well done and thank you to all at APM who have worked so hard to achieve this recognition.

**Roger Walker**

Excellent news – a long time coming. Project management really is a profession – official.

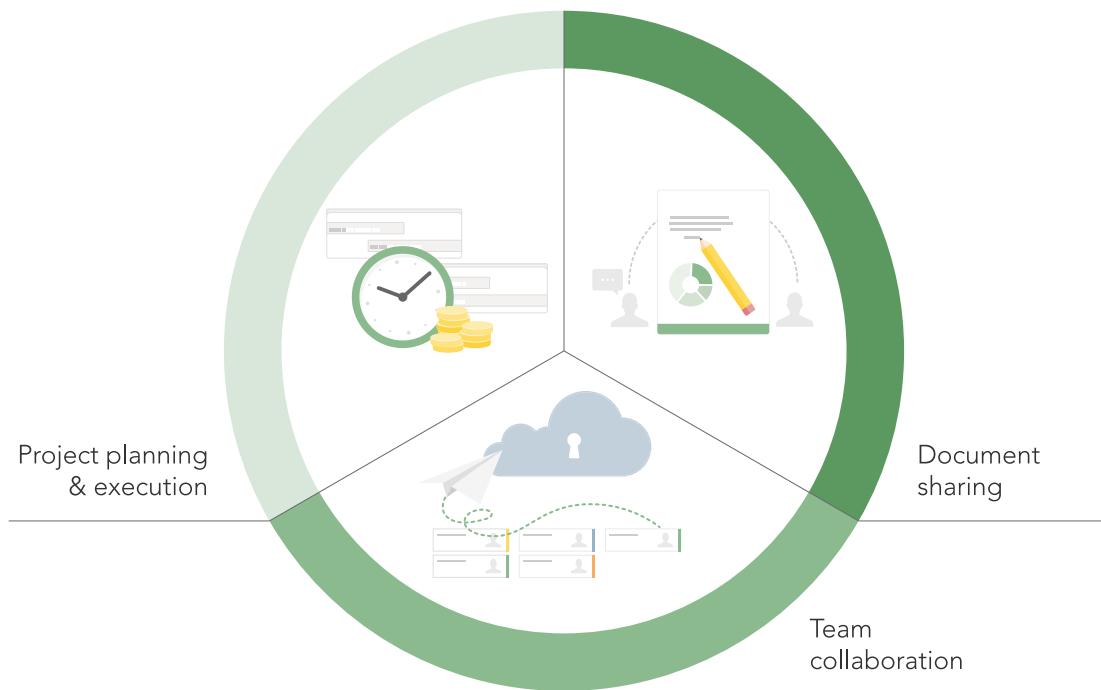
**Derek Bowles**

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# Best of the blogs

Project learns what APM's experts have been debating in these excerpts from their blogs. Read the blogs – and many more – in full at [apm.org.uk/blog](http://apm.org.uk/blog)



## COMMUNICATE, MOTIVATE, COLLABORATE

Posted by John Chapman on 5 December 2016



Airline pilots are taught the mantra 'aviate, navigate, communicate'.<sup>1</sup> It stands to reason that they are there first and foremost to fly the plane and keep it in the air. Then, they need to navigate the plane to the target destination. Finally, they must communicate with

those who need to know what the status is, how the flight is progressing, any issues and so forth.

Now, what about when it comes to project work? I suggest an alternative mantra for project managers: 'communicate, motivate, collaborate'.

The first thing to do is communicate. Project planning requires communication, risk management requires communication, issue resolution requires communication, and stakeholder management requires communication. For project managers, it can't be denied that excellent communication skills are essential, and we must use them.

Next, the team needs to be motivated, to have drive and determination. If team members do not have fire in their bellies, it needs to be lit. John Kotter says: 'Establishing a sense of urgency is crucial to gaining needed cooperation'.<sup>2</sup> Let us inspire, encourage, embolden and fire up the team to deliver.

To collaborate means to work together. Having communicated what needs to be done and motivated the team with the desire to deliver, we collaborate to complete the work successfully.

In conclusion, remember these three powerful words: communicate, motivate, collaborate.

1. The Federal Aviation Administration, *Fly the Aircraft First*  
2. John P Kotter, *Leading Change*, Harvard Business Press (2012)

IF YOU WANT TO WRITE A  
BLOG FOR THE APM WEBSITE,  
CONTACT KIRSTEN BIRD –  
[KIRSTEN.BIRD@APM.ORG.UK](mailto:kirsten.bird@apm.org.uk)

## SHOULD MAJOR PROGRAMMES HAVE A 'SINGLE CONTROLLING MIND'?

Posted by Neil McCrimmon on 20 October 2016

Two questions I have been grappling with are: should major programmes have a 'single controlling mind'? And could it work?

A single controlling mind doesn't necessarily mean a single individual; more realistically, it is a small group of experts working as an integrated planning team. In my opinion, due to its complex responsibilities, a single controlling mind can form part of the programme management office (PMO) or the programme executive leadership team, but the role needs to be formalised, clearly defined, resourced and empowered to make the appropriate decisions.

Some programmes decentralise this role, with each work stream or function undertaking these planning activities at the local level, with the central PMO responsible for integrating inputs.

There is a compelling military analogy here for the use of a single controlling mind. Military campaign strategy and mission command and control are undertaken centrally by teams with situational awareness from across the battle space – making decisions based on 'campaign first' criteria. The troops out in the field are then empowered to work within the boundaries set by the central command team.

The key attribute of the centralised command structure is the authority to instruct. The central team makes decisions for the good of the programme based on having visibility across the portfolio of interrelated projects being delivered. This could include concentrating scarce shared resources in the right areas of the overall programme at the right time, and designing/evolving the overall delivery model for the programme.

The single controlling mind should:

- Comprise deep subject-matter experts, who have experience of the domain and programme type.

- Be dynamic – capable of anticipating and reacting to emerging situations, making decisions at short notice, and analysing the long-term strategic needs of the programme to put in place the actions required to ensure success.

But can a major, multibillion-pound programme of tens of thousands of people and thousands of suppliers really be planned and managed in this way?

My contention is that it can. Every orchestra needs a conductor, every battle a commander. They have the full picture upon which to make decisions and provide clear direction and instruction.

Using the conductor analogy, they set the direction and boundaries within which the orchestra works, allowing the members of the orchestra thresholds of freedom within which to play and be creative. Major programmes can also work in this way – with the single controlling mind setting boundaries for the work streams and/or functions of the programme to work within.



# Reasons to be cheerful

APM's Chartered status should further help project management professionals take their rightful place at the corporate top table, argues **MIKE CLAYTON**



## **Chiropractors, taxi drivers, the Marylebone Cricket Club and internal auditors.**

All of these have received a Royal Charter in recent years, as have many other organisations. The first one was granted to the University of Cambridge in 1231. So what does a Royal Charter mean?

The Privy Council (which grants them) says on its website that, nowadays, Royal Charters are granted to "bodies that work in the public interest... which can demonstrate pre-eminence, stability and permanence in their particular field."<sup>1</sup>

Pre-eminence, stability and permanence. These seem to me to be particularly valuable at the present time. In a world where public discourse and mass politics are becoming more distrustful of expertise, we are facing more, not less, uncertainty. While respect for expertise is diminishing, its value is increasing. And we need a balancing force of stability.

But does it seem a little incongruous? Project management as a force of stability? We are all about change. Of course, permanence and stability refer to your professionalism in managing the process of change.

**THE BIGGEST BENEFIT OF FORMAL PROFESSIONALISATION OF PROJECT MANAGEMENT WILL BE OUR ROLE IN BUSINESS AND PUBLIC AFFAIRS**

So, project management matters. I don't need to persuade you of that. But what I may need to convince you of is the reason to be optimistic. Because, if experts are decried, why would you seek to be one?

And what do I think will be the impact of APM's Chartered status? I do expect it to raise levels of interest in the Chartered standard for APM. But I don't think your colleagues will look at you differently, just because your professional body is Chartered.

But words matter, and APM clearly links Chartered status to professionalism. And that's the word I'd like to explore. What does it mean?

Originally, a professional would profess an oath on entering their profession. This was a symbol of their commitment to 'work in the public interest'. APM already has a *Code of Professional Conduct*, the 'Accountability' strand of its FIVE Dimensions of Professionalism. We need this now more than ever. It is about ethics and responsibility.

Of course, there has always been more to the professions than their oaths. There has been collegiality on the positive side and self-interest at the opposite extreme. And there has been rigorous training and standards. Project management has moved a long way on this in the past 20 years, and APM continues to lead us in the right direction.

But, for me, the biggest benefit of formal professionalisation of project management will be our role in business and public affairs. In APM's application

for Chartered status, it drew attention to the scale of government expenditure on projects. That is mirrored in the private and not-for-profit sectors.

Not only do we act as professional custodians of a vast amount of spending, but we also hold the reputations of vast organisations in our care. And there is an associated point I make when speaking to and training project boards and sponsors. Because project expenditure carries more risk than other corporate spending, the governance of projects needs to be all the stronger.

This should open up big opportunities for professional project managers. In recent decades, the IT (1984), marketing (1989) and HR (2000) professions have gained Chartered status. And, increasingly, we are seeing marketing, HR and IT professionals taking their seats on corporate boards.

I believe it is only a matter of time before a substantial proportion of UK businesses have a board-level director of project management. That is a reason for optimism, both for your career and for the success of your projects. Chartered status can only help to accelerate that welcome shift. □

<sup>1</sup>[privycouncil.independent.gov.uk/royal-charters](http://privycouncil.independent.gov.uk/royal-charters)



**MIKE CLAYTON**  
is a speaker and trainer, the author of several project management books, and the founder of **OnlinePMCourses**

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# Dealing with digital disruption

Project managers must ensure they have the skills to embrace the ways in which technology is changing the workplace

**Digital disruption is changing the way we work.** Presenting both new challenges and opportunities for business, it is all about innovation and empowerment, and is consistently demanding change from established business technologies and methodologies.

Self-driving cars, health and fitness monitors, artificial intelligence and 3D printing; these are just a few of the technologies that will have a massive impact on how we work. Analyst firm Gartner predicts that, in the near future, many employees will be required to wear health and fitness tracking devices as a condition of employment, and that, by 2018, 45 per cent of the fastest-growing companies will have more smart machines than employees.

Another advance is 3D-printing technology. However, a Gartner report noted that, by 2018, 3D printing could result in intellectual property owners losing at least \$100bn per year through copyright theft.

## THE NEED TO BE AGILE

It is clear that companies need to adapt and become more agile to deal with these evolving challenges and make the most of the opportunities digital disruption provides.

One of the main challenges is the speed of technological change. Today, technology moves faster than regulation, compliance and governance, including most project approaches. It can be tough for organisations to change their mindsets to thinking disruptively, to throw aside legacy systems and build something new from scratch. However, with the transformative ability that even the smallest technological project can

now bring, such 'pinpoint laser focus' approaches can bring the largest return on investment.

## EMBRACING CULTURAL CHANGE

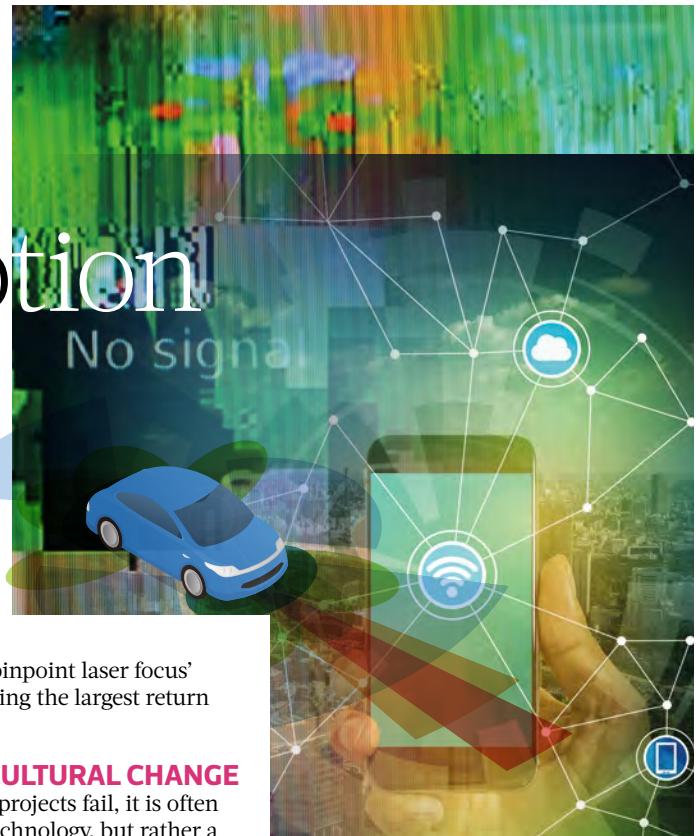
These days, when projects fail, it is often not down to the technology, but rather a lack of willingness to accept the cultural change it brings. This is why the project manager's role of ensuring organisational buy-in and preparing staff for the upcoming changes is so crucial.

Disruptive technology enables the creation of a service or system at a much faster rate than ever before, but, alongside this, it brings the chance of projects opening up the business to new threats. In this situation, I feel that it is the project managers that are the first line of cyber-defence. This is because they are increasingly heading up digital projects that may not even have the involvement of their IT department.

With this in mind, project managers need to consistently consider whether current and new systems are secure, and understand where data is stored and how it is encrypted. Throughout a project – whether or not IT is a key component – they must continuously consider security and cyber-threats, and question whether the potential cultural changes are understood, what the cyber-risks are, and how high such risks are.

## THE IMPORTANCE OF CPD

Project managers are not, and should not try to be, cyber-security experts, but I do think it is important that they know the basics in order to be able to question the processes and choose the best technical advisers. Continuing professional development (CPD) in its many forms can help keep knowledge up to date.



Project management is changing, and those who lead the way will become more agile, innovative and proactive in their approach. Successful project managers will watch for emerging trends and technologies and ensure they are aware of upcoming changes – something that can be done in all manner of ways.

CPD isn't just about professional accreditation; it is also about attending workshops or lectures, taking part in webinars, and keeping a journal of what you set out to achieve and the outcomes – something I have done for the past 15 years.

Digital disruption is exciting – fun, even – and should be embraced. Behind the technology is the goal of making life better and easier, and, for businesses, it can lead to new markets and growth opportunities. While trying to keep up with high-speed technological changes, it is important to think about how to make the most of them and remember the benefits they can bring. □



**JON BUTTRISS** is CEO at BCS Learning & Development Ltd, part of BCS, The Chartered Institute for IT

# With advances in artificial intelligence (AI), could traditional project management skills become a thing of the past?

*Project* asks two experts for their opinion on this issue's big question

A former mentor once told me that, in 45 years in business, nothing much had changed – the only advance had been the kind of reporting made possible by earned value analysis. He used this technique from the early 1990s, well before it was fashionable or even widely known. His message was that the fundamentals of good project management remain the same, but we should embrace new tools as and when they come along.

With all the technological developments that surround us, the pace of change is much more acute than it was for him. At my firm, we embrace innovation and technology. New techniques and devices enable us to do a better job for clients. AI will simply be another tool in our belts, rather than something that fundamentally disrupts what we do.

Traditional project management skills – such as managing teams, clients and stakeholders; decision making; and managing the politics of the project – will remain at the heart of our work. Project

management requires the ability to answer, and influence, the core aspects of what is happening. What is it going to cost? When is it going to be ready? Are we getting value for money? It might be that AI could answer some of

these questions, but let us look one step further.

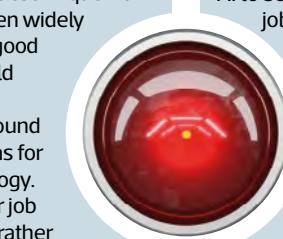
In the introduction to APM's *Planning, Scheduling, Monitoring and Control*, we included a paragraph on the most fundamental of all project management skills: the application of common sense. We wanted to make the point that all of what we have written on the subject needs to be taken, in effect, with a pinch of salt – that a one-size solution cannot possibly fit all. How does one define common sense? And, more importantly, how can AI be programmed to either learn or develop common sense?

Now consider planning, one of the hard skills of project management. Planning is an art based on experience, sector knowledge and technical skill. An allied but separate skill is scheduling, the science of describing a plan. AI could conceivably undertake the scheduling part of project management – but for a machine to truly plan would be a much bigger challenge.

Can AI achieve this level of sophistication?

Possibly, in part. But, in terms of bringing everything together to fulfil a goal, the human element will remain fundamental.

**PAUL KIDSTON** is director of project controls at Costain and the lead author of *Planning, Scheduling, Monitoring and Control*, published by APM



## TRADITIONAL PROJECT SKILLS WILL REMAIN AT THE HEART OF OUR WORK

AI is all around us. We see more deployments announced each day, and we see positive and negative comments about the prospects for AI to both augment what we do, and potentially take over people's jobs. Although many of the AI techniques that are now being put to productive use have been around for decades, we seem to have just reached the tipping point where computing systems, networks and online knowledge bases have sufficient power to use AI to assist us. In the past year, we have seen effective speech-driven personal assistants, adaptive machine learning-driven applications, capable game-playing programs, autonomous vehicles and more.

Project management, planning aids and task-achieving agents will form a new wave of deployed AI systems alongside large-scale machine learning and adaptive systems, semantic-web knowledge systems and the speech/voice interfaces seen today.

Some people see AI applications operating in isolation and taking over specific jobs or roles from people. But I see future AI systems more as cooperative agents, working alongside people and augmenting their skills. AI planning, scheduling and constraint-based systems are in use across many industries. We will see more deployments as the platforms that can use these compute-intensive algorithms improve.

One example is the Optimum-AIV system for assembly, integration and testing of the Ariane spacecraft's payload bay. This system works alongside traditional project management tools to deal with the complex constraints and options available, especially to advise when fixes are needed in high-tempo situations or if tight deadlines apply.

The project management task lends itself to support from a particular type of AI called 'mixed-initiative systems', where the unique capabilities of people work alongside the particular strengths of AI systems, and each can contribute to improved and effective outcomes. A project manager's tasks relate to people and organisations, as well as dealing with the technicalities of the constraints and resources – and those roles will not disappear.

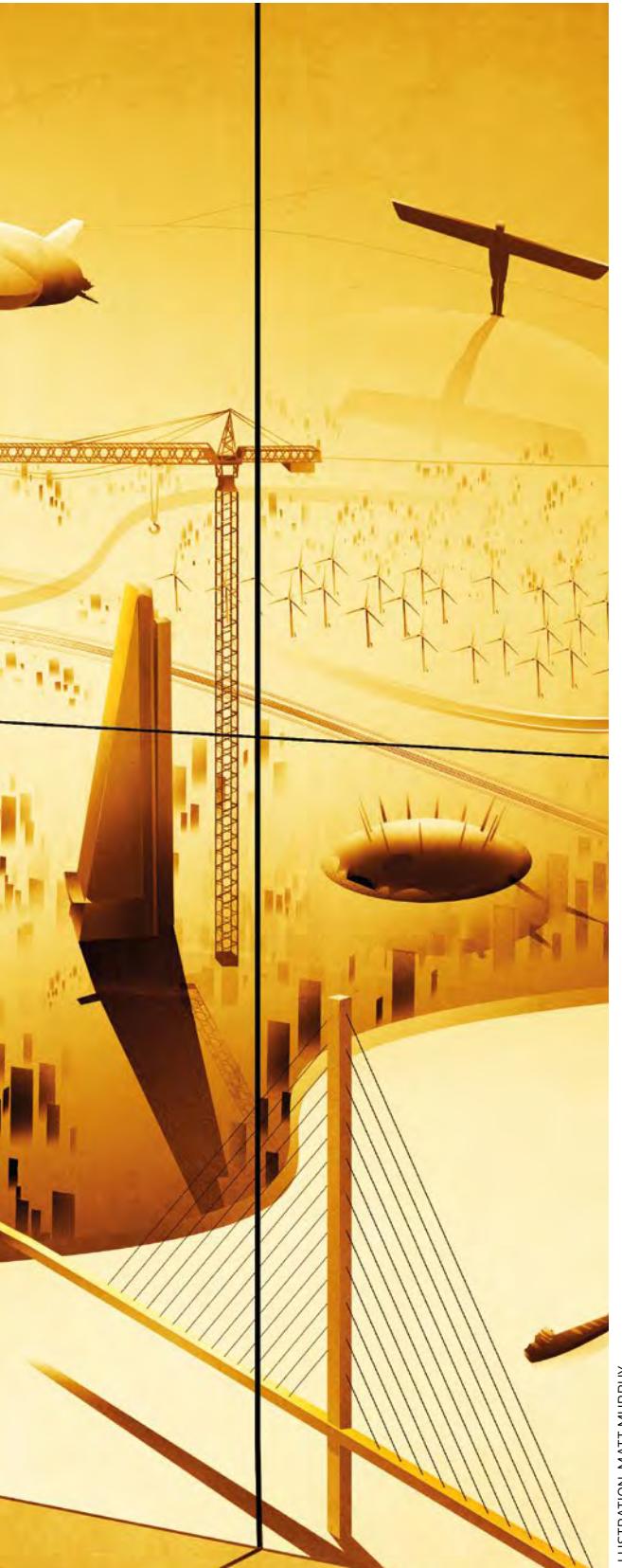
So, project managers will not be replaced by AI. But change is coming to many jobs. I expect that those of you reading this will be among those able to take advantage of the changes.



**AUSTIN TATE** is professor of knowledge-based systems at the University of Edinburgh and director at the Artificial Intelligence Applications Institute







# THE ROYAL CHARTER

## ACHIEVING RECOGNITION AND RESPECT

Since its early days, APM has played a leading role in promoting the profession, raising standards and developing excellence through its qualifications in project management.

This contribution has included the APM Body of Knowledge and APM Competence Framework, as well as qualifications that provide developmental opportunities and recognition for all stages of a project professional's career.

Chartered status takes APM to the next stage in its journey of growth.

It has been achieved thanks to the hard work and commitment of those dedicated to achieving APM's goals of upholding and raising professional standards in project management.

To celebrate this achievement, leading figures from APM and the wider project management community reflect on what APM and its new status mean to them as project professionals.



**DAVID WABOSO**  
PRESIDENT, APM

Projects are the way that modern economies deliver change.

They act as a key driver of jobs and growth in the economy, enhancing the quality of people's lives, and aiding sustainability and security.

Although it is true that project management largely grew out of engineering and the built environment, it can now be seen at the heart of nearly all business sectors, from financial services to pharmaceuticals, retail and wholesale.

Now, through APM's Royal Charter, the profession has achieved official recognition of the sheer scale of project management's impact on both the economy and society.

This, in turn, demands that we, as individuals, continue to commit to personal learning and development, and also to the highest standards of probity and integrity.

The challenges for the profession are becoming more complex and intertwined. The world is politically fractious. We face endless demand, increasing expectations and an ever-present downward pressure on costs. Technological advancement is driving a fourth industrial revolution, in which managing data and automation will be key.

Increasing social, political, economic and technological change, nationally and globally, underline the need for successful management of projects.

So, the Royal Charter brings welcome status and recognition that consolidate our position among other professional bodies. But we must make it a staging post on a longer journey towards growth and prosperity.

**"THE CHALLENGES FOR THE PROFESSION ARE BECOMING MORE COMPLEX AND INTERTWINED. THE WORLD IS POLITICALLY FRACTIOUS. WE FACE ENDLESS DEMAND, INCREASING EXPECTATIONS AND AN EVER-PRESENT DOWNWARD PRESSURE ON COSTS"**

**DAVID WABOSO**, PRESIDENT, APM



John McGlynn, David Waboso and Sara Drake with APM's Royal Charter



**SARA DRAKE**  
CHIEF EXECUTIVE, APM

This is an important moment for the profession, providing official recognition of the status of project, programme and portfolio management. Chartered status will help APM develop its leadership role as the voice of the profession, demonstrating the societal and economic contribution of project management, leading and influencing others, and encouraging interdisciplinary collaboration with like-minded individuals and organisations.

There is a need from time to time to consider the forces buffeting the profession and what we can do to help members succeed. But our core purpose – meeting the needs of members and the wider public, creating a sense of community, facilitating networking and employment opportunities, and providing qualifications and skills – will always remain important.

APM will, as always, continue to promote the core values at the heart of the project profession: confidence and trust, excellence in professional knowledge and judgement, and delivering beneficial change.

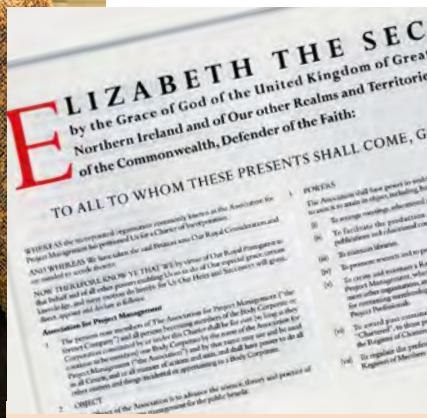


**JOHN  
McGLYNN**  
CHAIRMAN,  
APM

It is a real privilege to take on the chair role for APM at such an exciting time for the profession. The Charter provides recognition for the profession, reward for the Association that has championed its cause, and opportunities for those who practise its discipline.

Having a day job as a director at Atkins, one of the world's leading engineering and project management consultancies, brings home to me the importance of the work that APM has been doing over the past 40 years. That work has made a significant contribution to the ability of organisations such as mine to deliver today's increasingly complex projects on time as well as on budget.

The APM *Body of Knowledge* has guided our project managers, who assess their skills against the *APM Competence Framework*, and make extensive use of qualifications and professional networking events to develop their skills and share knowledge.



## THE BENEFITS OF CHARTERED STATUS

- **Raising standards through a robustly assessed register of project professionals who are committed to professional development and a code of conduct**
- **Enhancing the status and recognition of project management as a means of delivering beneficial change in our economy and society**
- **Facilitating continued collaboration and research to develop the practice and theory of project, programme and portfolio management**



**TOM  
TAYLOR**  
PAST  
CHAIRMAN  
AND PAST PRESIDENT, APM

I would like to express my and many others' appreciation to all the people and groups who have conscientiously and professionally supported the Chartered application, over an extended period, each and every step of the way – and achieved this result and success.

It is invidious to name names. APM chairmen, APM board members/trustees, chief executives, company secretaries, and our special advisers and legal teams – they all deserve our appreciation. There are very many others who showed understanding, discretion and patience.

So, time to consider, reflect and celebrate... but only for a short time. Then we will be pressing on. This is a great time to be interested and involved in any aspect of project management. The project management community, including APM, now has important and vital work to do.

**FRANCES NICHOLS, CHAIR,  
AND KATHRYN NICHOLS,  
CEO, THE NICHOLS GROUP**

In 2007, as chairman of APM, Mike Nichols, our father and the founder of

The Nichols Group, began a project to inspire and gather support to obtain a Royal Charter for APM. He worked determinedly towards achieving this until his sad passing in 2013, and we are certain that he, like us, would be delighted at this successful outcome.

Chartered status demonstrates how important all those involved in project management are in achieving growth, improving the quality of people's lives and enhancing future prosperity. It gives project professionals recognised standing among the others who contribute to project delivery. It also gives the public confidence that the Chartered professionals delivering projects have achieved a standard, abide by a code of professional conduct, and maintain and develop their skills.





The Mike Nichols Award, launched to celebrate his legacy, commemorates Mike's ethos – recognising projects, organisations and individuals who inspire others and deliver positive and



**Mike Nichols**

lasting benefits to society and the world. The Royal Charter will inspire and attract people into the project profession, and it will be an important part of Mike's legacy.

### **SIMON TAYLOR BOARD MEMBER AND VOLUNTEER CHAMPION, APM**



When I first joined APM some five years ago, Chartered status (and when we would attain it) was always a hot topic of debate. Becoming Chartered has

always been a key step on the career paths of other professions and, for APM, it represents a critical part of our journey towards cementing the importance of project management to society.

This news is a pivotal step forward for APM and really highlights the importance of the volunteer community and the role it plays in generating, disseminating and facilitating the discussion of project management principles and the application of knowledge.

Chartered status will drive us to ensure we actively safeguard the reputation of the Association and the profession in everything we do. I've never been more excited about our future.



### **SPENCER HOBBS 2016 APM PROJECT PROFESSIONAL OF THE YEAR**

APM's Chartered status will provide a benchmark for project management excellence that practitioners from all industries can aspire towards and be measured against.

I found that obtaining the Registered Project Professional designation gave me a highly effective framework to identify the project management competences that I needed to develop to the acceptable standard. It also gave me the confidence to put

### **THE NEXT STEPS NOW THAT APM IS CHARTERED**

- APM is now establishing an operational Chartered body.
- The grant and sealing of the Charter completes the first stage in this process.

Two further stages must follow:

- Stage 2: APM's executive will undertake various procedural, legal and accounting steps necessary to activate the new Chartered organisation on 1 April 2017.
- Stage 3: The new Chartered organisation will conduct an open and public consultation on aspects of the new Chartered designation. It will then give due consideration to the results of the consultation in order to finalise the criteria for admission to the register of Chartered project professionals. After this, APM will begin accepting applications to the register.

**It is anticipated that Registered Project Professionals will have already demonstrated the competence level required for any future Chartered standard. More information about this will be provided by APM on its website throughout the process.**

**"BECOMING CHARTERED HAS ALWAYS BEEN A KEY STEP ON THE CAREER PATHS OF OTHER PROFESSIONS. FOR APM, IT REPRESENTS A CRITICAL PART OF OUR JOURNEY TOWARDS CEMENTING THE IMPORTANCE OF PROJECT MANAGEMENT TO SOCIETY"**

**SIMON TAYLOR**, BOARD MEMBER AND VOLUNTEER CHAMPION, APM

myself forward for APM's 2016 Project Professional of the Year award.

I anticipate that the Chartered designation for APM as it makes the transition to the new Chartered body will encourage many others to identify and make improvements across each of their project management competences, which will result in a better holistic performance.



### **SARAH TYSON PROJECT MANAGEMENT APPRENTICE, SELLAFIELD LTD**

I am currently studying an FdSc in project management, part of the four-year Project Management Apprenticeship Scheme. This course complements my day-to-day work because it is delivered on a day-release basis and will allow me to develop my academic understanding of project management.

One of the key benefits of attending this course is that the degree is accredited by APM. As a consequence of this, the degree is recognised by various industries and remains in keeping with the professional body's best practice.

Through Sellafield's Project Academy, my goals are to successfully complete my foundation degree and continue my academic studies further within the company, potentially progressing to a master's degree. □

**READ MORE ABOUT APM'S JOURNEY TO CHARTERED:  
[APM.ORG.UK/ABOUT-US/CHARTERED-STATUS](http://APM.ORG.UK/ABOUT-US/CHARTERED-STATUS)**



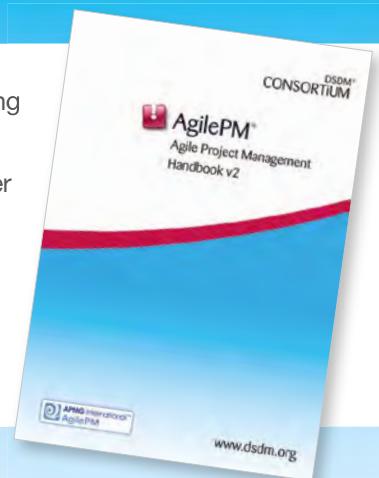
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# BUILDING A LEGACY

The Crossrail project will leave an indelible mark on London's infrastructure. **DAVID CRAIK** investigates how an innovative programme is also delivering tangible benefits for the communities Crossrail has affected



**Cooking meals for the homeless, setting up** a science club in a school and helping a cash-strapped kids' football team travel to the World Youth Cup are not what most people associate with a construction project.

But these are just some of the life-enriching schemes carried out as part of Crossrail's ambitious Community Investment Programme. Hailed as the first of its kind for a major infrastructure project, the programme requires Crossrail construction contractors to donate their skills, time, money and expertise to bring lasting benefits to the communities in which they are investing.

Each contractor is required to provide a community investment plan customised to each specific community.

Ben White, Crossrail's head of community relations, says its role begins at the bidding process: "The community relations team looks at every contract tender, and part of the evaluation of a bidding contractor is our assessment of its community plans. At this stage, we would expect it to lay out an approach to its community work, but we would understand that it would have a fair amount of research to do after it won the contract to fully develop it."

"Again, this evaluation at the bid stage is a first. It is not as high a priority in a bid as cost, value and quality, but it is important."

It is very much up to the contractor to define what community work it will do.

White explains: "We expect them to get out to communities, talk to local organisations, and understand where their skills and experience can add value. It may not be the direct neighbour to the worksite; instead, it may be a school or charity a few streets back. They will have to work hard to properly understand the needs."

## MOTIVATING FACTORS

Why the deep focus on community relations? White cites legal obligation as the first reason, with the *Crossrail Act 2008* requiring the project to be the best neighbour it can be.

"Second, it makes great sense to do community relations," he states. "We strive to minimise disruption, keep people informed of the process and add value through projects. It means that businesses, schools and residential neighbours, as well as the local authorities that give us consent on a range of matters – such as planning or night-time working – will see us as a good, caring operator. If that is the case and we can build a permissive environment, then they are far more likely to let us do the job on time and on budget. Those are the pragmatic reasons – to get on with the job without much fuss."

The third driver is a moral obligation. "We are spending nearly £15bn of the





Clockwise from left: Excavation of Broadgate ticket hall at Liverpool Street station; Thames Ironworks uncovered at Instone Wharf; part of a Roman figurative pottery vessel; gravestone of Mary Godfree, found at Liverpool Street station



## DIGGING THE PAST

Crossrail claims that its archaeology programme is one of the most extensive ever undertaken in the UK. It employs a team of archaeological specialists to investigate and record findings.

Since the construction of the Elizabeth line began in 2009, 100 archaeologists have found more than 10,000 items from 40 sites spanning 55 million years of London's history.

Items include horse skulls and gaming counters from Roman times, a 16th-century knife scabbard, bison bones, human remains from the infamous Bedlam psychiatric hospital, and a rare piece of amber, estimated to be 55 million years old.

Crossrail has disseminated the information on its finds to the wider archaeological community, with significant artefacts being provided to the Museum of London and the Natural History Museum.

public's money in the middle of where they are living and working. It is a multi-year job, so we have to do community relations well and mean it," White says.

"Can we tap into something good from our contractors to help the community while they are carrying out the job? These are often deprived areas of London and, for not much capital investment, we could do some lasting good."

### THE IMPORTANCE OF LEGACY

A contractor's project also needs to show a legacy element, White explains.

"When a contractor has finished its job, we want to see its projects run beyond the life of the contract. It is easy to spend £5,000 on painting a community centre, but what happens when it needs repainting? As a contractor, you need to think 'What can I do that will mean this great scheme will continue well into the future?' It's a challenge, because it is easy to look around and find quick fixes. Even local organisations struggle to tell us

what a long-term sustainable community scheme might look like."

Starting in 2016, contractors have been obliged to create exit plans detailing how they intend to withdraw from their projects, keeping legacy firmly in mind. White says this work will be assessed in 2017 and continue the evaluation work developed since the start of Crossrail.

"We assess contractors across a range of criteria, including community investment and delivery strategy," he says.

The criteria measure how much financial investment a contractor has

**"THESE ARE OFTEN DEPRIVED AREAS OF LONDON AND, FOR NOT MUCH CAPITAL INVESTMENT, WE COULD DO SOME LASTING GOOD"**

put in and the hours it has given to the activity. Outcomes are also assessed, such as how many people have been employed after going to a contractor's 'getting back to work' scheme.

"Contractors are then given a marked report," White explains. "We sit down with them to see where they've been good and discuss sharing these ideas with other contractors. We also look at areas where they need to improve. There are no financial penalties for bad scores, but we do publish all the contractor results, and they can see how they stand against their competitors. That can be an incentive."

### RECOGNISING THE BENEFITS

Crossrail's approach raises questions about project managers' attitudes to community relations, and how community work might affect the core job of construction.

"We have found that it can really engage a workforce. People come back from a reading class at a primary school



## GIVING BACK

Over the past four years, BBMV has worked with homelessness charity Providence Row, whose main projects have involved transforming its previously unused courtyard and rooftop into urban gardens. Here, vegetables and herbs are grown for use by the charity's catering trainees when they make meals for up to 50 rough sleepers every day. Homeless people can also wander through the garden and engage with nature.

BBMV has donated £40,000 to date to help supply the equipment, project management support and staff volunteers.

"We hadn't specifically lined up a charity before we got the Crossrail contract," explains BBMV project director Nigel Russell. "We looked at the local area and found Providence Row, whose base was in the middle of our two work areas in Whitechapel and Liverpool Street. It works hard getting people off the streets, including re-education and employment support. It was a very interesting scheme."

He says that one of the keys of the project is leaving a legacy after BBMV has gone. "It's about spending the money smartly on a project that will continue to flourish into the future. The gardens will keep helping the charity and the homeless for years, and that is very satisfying."

The scheme has also helped Providence Row attract other investors. "They've seen what we've done, read the articles and also want to get involved. It's about breeding success," Russell says.



enthused and energetic, and they put that back into their work," says White. "Initially, some say 'This is an add-on – do we really have to do it?' But now the vast majority of project managers really understand the importance of getting on with the neighbours. They get the pragmatic and moral reasons for putting this into contracts. Many of them get personally involved in the schemes."

Nigel Russell, project director at BBMV, the joint venture between Balfour Beatty, BeMo Tunnelling, Morgan Sindall and Vinci Construction that is delivering Crossrail's new Whitechapel and Liverpool Street station tunnels, certainly has this enthusiasm. Over the past four years, BBMV has worked closely with homelessness charity Providence Row, creating two urban gardens (see box, left).

"The benefits from our work include leaving a contribution to London, a legacy after we've left, and the sense



**"YOU GET TO BETTER UNDERSTAND THE COMMUNITIES YOU ARE WORKING WITH. YOU SEE COLLEAGUES WORKING IN A DIFFERENT WAY, AND YOU SEE THEM BOND. A COMMUNITY PROJECT GIVES PROJECT MANAGERS A BROADER EXPERIENCE"**



of pride it gives our workers," Russell explains. "They are all volunteers; it is not compulsory to help the charity, and they get so enthused by it. It's people from different walks of life coming together. From a project management perspective, it enhances the job that we do. There is no extra operational hassle, and it doesn't take us away from our core work. All construction projects are developing this community involvement nowadays."

Indeed, he says it is something his firm, Balfour Beatty, now does regularly on its major schemes.

## GAINING MOMENTUM

Mark Williams, government finance expert at PA Consulting, agrees that these schemes are now commonplace: "Construction firms have long focused on their corporate and social responsibility. Crossrail sensibly packed it up in a specific way around a major project,

a specific geography in London and a series of contractors. With major projects, if they were all purely commercial endeavours, then none would ever get completed. The whole thing is generally being done for social and economic benefits."

From a project management viewpoint, Williams believes community schemes are invaluable: "You get to better understand the communities you are working with. You see colleagues working in a different way, and you see them bond."

"For a project manager, a community project will just be one of the added things they have to work on that gives them broader experience. If I were a project manager, I would identify a bright young junior project manager and let them manage it. It would help keep the best young talent highly engaged."

Holly Price, training and development director at Keltbray, says her team helps its project managers handle community

relations: "Project managers like to get involved and choose a local charity or school to help, but we then manage the process. Doing community relations can add to the work a project manager does, and sometimes it may be difficult for them to step out of their day-to-day job."

"We make the effort to engage with the community, which helps the whole project run more smoothly and the project manager get their core job done."

She says local authorities and developers, not just London 2012 and Crossrail, are pushing community work forward. However, there is no national strategy.

"Local authorities have different priorities when they contractually require developers to make community investment," Price says. "They may have homelessness or employment issues. We have to adapt to that and meet their targets, or face financial penalties. Assessments can include how many apprenticeships you created per millions of pounds, or how many training days you put on. It is a target, but we love it, and it gives our staff the chance to do something that isn't written in black and white on their job description sheet."

## TEMPLATE FOR THE FUTURE

Williams picks up on the national point. He declares that he is a fan of Crossrail and urges the government to replicate such major schemes and their community impact outside London: "Let's see something similar in other parts of the country where there are infrastructure demands, and economic and social needs."

White is hopeful that there will be replication of the Community Investment Programme in future national projects.

"It genuinely is the right thing to do and makes for a better project, so any future project would be foolish to ignore it," he states. "We are trying to share all the work we have done on Crossrail and are already engaged with HS2, the Thames Tideway Tunnel and Crossrail 2 on this. HS2 is requiring all of its contractors, just as we did, to carry out community investment as part of their contract. That's because of what we have done."

For more details, see [crossrail.co.uk](http://crossrail.co.uk) □

**DAVID CRAIK** is a business journalist and editor

# RUNNING LONDON'S GREATEST SHOW

The London Marathon is one of the world's largest mass-participation marathons. Sarah Notton talks to its operations director, **LISA THOMPSON**, about what is involved in organising this great sporting institution

**As anyone who has participated or been** a spectator at the London Marathon will know, it is an event like no other. For one amazing day every April, the streets of London are filled with crowds cheering on runners of all abilities who have trained for months for the chance to complete the gruelling, 26.2-mile course. A record 39,140 people finished the course in 2016.

Backing up this grit and determination is an enormous logistical operation to deliver the event. First staged in 1981, the London Marathon has grown to become a national institution of fun, fitness and fundraising that has raised millions for charity. It is a major challenge to ensure that marathon day is safe, enjoyable and memorable for runners and spectators.

Lisa Thompson, operations director at London Marathon Events, is proud to be involved: "Everyone loves the London Marathon. Even taxi drivers are hard pushed to criticise it. It has tremendous resonance with so many people and is, I believe, one of Britain's greatest sporting festivals. After 36 years and a million finishers, virtually everyone knows someone who has run the London Marathon."

A former international-standard middle-distance runner, Thompson has been working for London Marathon Events since 1994, and has been its operations director since 2008. Her 16-strong team works across a portfolio of seven events, the newest of which is Swim Serpentine, a festival of open-water swimming that was held for the first time in September 2016. She is passionate about her involvement with the London Marathon.

"One of the reasons it is so great to work on," she says, "is that it is held in such high regard by so many people, including the hundreds of stakeholders we engage with each year. People work really hard to ensure the London Marathon's continued success."

## LARGE-SCALE LOGISTICS

Unsurprisingly, the challenges come thick and fast, explains Thompson: "London is a huge, complex and ever-changing city. It is amazing that, as we approach the 37th London Marathon, the route has not changed significantly.

"Last year, we were grappling with the installation of the Cycle Superhighway, which was a huge project. Transport



A record 39,140 people finished the London Marathon in 2016; Lisa Thompson (inset) has been the event's operations director since 2008

for London had been in close communication throughout the build, and, like many projects, it went absolutely to the wire. At lunchtime on the Friday before the race, I was looking at unfinished sections, thinking it was doubtful it would get done.

"But, of course, it did, and the desire to make that happen – from the contractors on the ground to the project managers taking the stress – was a great example of how, when there is a will and a common goal, you can achieve anything."

## MANAGING MULTIPLE STAKEHOLDERS

Stakeholder management is a huge part of the team's day-to-day work: "We have regular planning meetings with stakeholders that include all the boroughs on the course, emergency services, transport services and more. We invite all the relevant stakeholders to detailed planning group meetings and we use a file-sharing site to upload documents, so stakeholders can download and read at their leisure."

Thompson continues: "We also have a very close relationship with BBC Sport, our host broadcaster, and hold regular



#### A PROBLEM SHARED

**"PROBLEMS ARE SOLVED BEST WHEN DISCUSSED WITH THE TEAM. WE HAVE A WIDE RANGE OF PEOPLE WITH DIFFERENT EXPERIENCE AND SKILLS. SOMETIMES, THE ANSWER COMES FROM AN UNLIKELY SOURCE"**

meetings with the BBC team to plan the huge outside-broadcast operation on race day."

She is a great advocate of the view that a problem shared is a problem solved: "I've always found that problems are solved best when discussed with the team. We have a wide range of people in our team with all sorts of different experience and skills. Sometimes, the answer comes from an unlikely source."

#### A CONTINUOUS LEARNING PROCESS

Learning legacy is also important for the team: "In terms of efficiencies, we have learnt the hard way over the years. This includes understanding that one large lorry to deliver equipment is usually more efficient than several smaller ones."

Thompson explains how the team deals with the stress involved in putting on such a high-profile event: "We have a mantra in our department when the stress builds during the last few weeks of planning, the working hours get longer and longer, and fatigue really starts to set in. We say 'but it's only a running race!'

The London Marathon is, of course, much more than that, but sometimes you need to clear your head and strip it back to bare bones. Remember what you are trying to deliver and why. Then get back to work."

*The Virgin Money London Marathon will take place on 23 April 2017. For more information and to enter the 2018 ballot, go to [virginmoneylondonmarathon.com](http://virginmoneylondonmarathon.com)*

**SARAH NOTTON** is the editor of Project

#### THE LONDON MARATHON IN NUMBERS

More than  
1 million  
people have  
finished the  
marathon

More than  
£770m  
has been raised  
for charity  
(2015 figures)

35  
articulated lorries  
transport the  
runners' bags from  
the start to  
the finish

50km  
of barriers  
keep runners  
and spectators  
safe

400,000  
passengers  
were carried by  
the Docklands  
Light Railway on  
marathon day  
in 2016

Following an epic construction project, the Gotthard Base Tunnel went into full service in December 2016. Forming a super-efficient rail route under the Swiss Alps, it is the longest tunnel ever built for passengers and freight, and has reduced journey times between Zürich and Milan by half an hour. **MATT PACKER** delves into some of the dizzying numbers behind this project

# PEAK PERFORMANCE

## CHIPPING AWAY: THE PROJECT'S BEGINNINGS

**1947**

the first concept for the tunnel is sketched and proposed

**1992**

the Swiss government holds a referendum on the project

**64%**

vote in favour of the tunnel's construction

**11 years**

between government approval and the dig's final breakthrough in 2010

**6 years**

between the breakthrough and completion

## A ROCK AND A HARD PLACE: ENGINEERING CHALLENGES

**2,400**

workers during peak periods

**73**

types of rock removed during the dig

**46°C**

temperature of some rock types

**28.2 million**

tonnes of rock excavated during construction – most was returned to the tunnel as processed concrete

**410m**

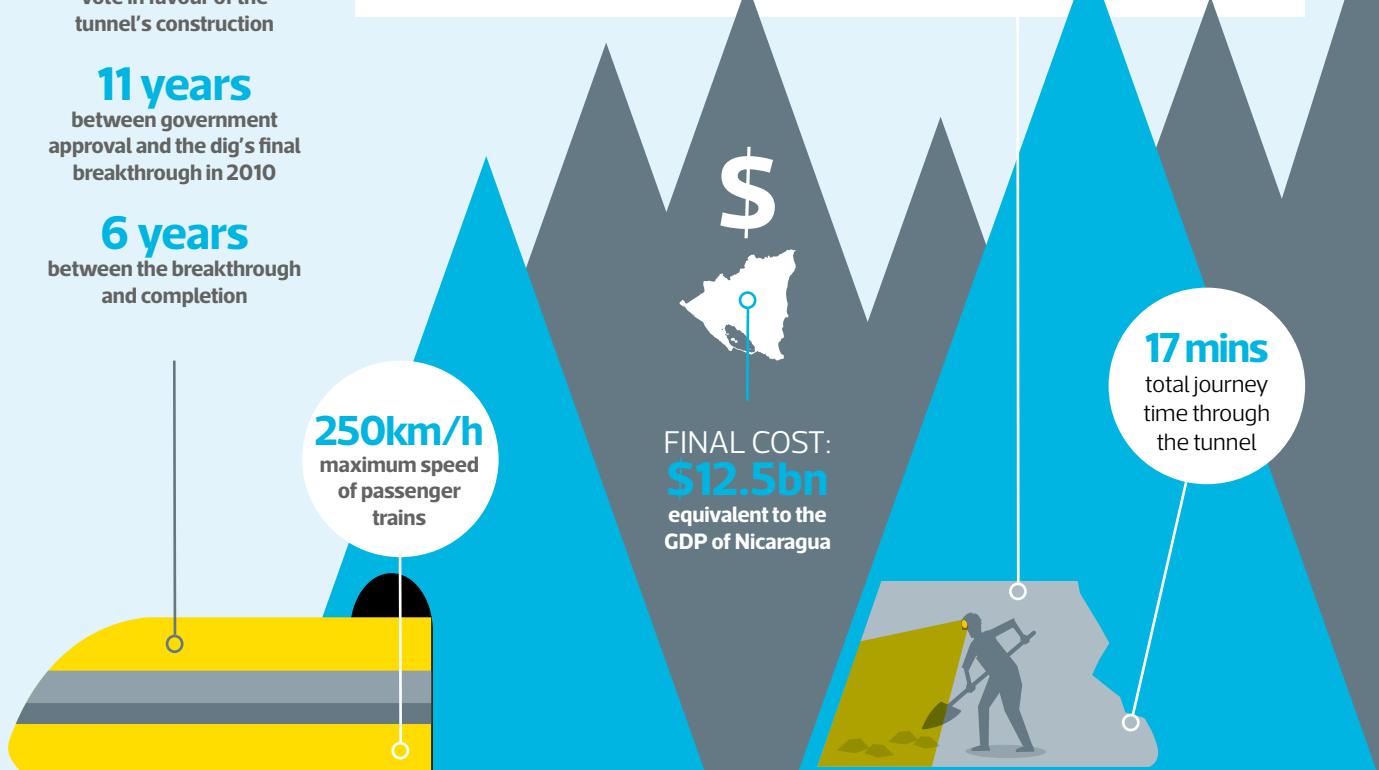
length of the project's purpose-built tunnelling machine, described as a 'rolling factory'

**2,300m**

depth of the tunnel at its deepest point

**0.00014%**

maximum deviation from intended angles and measurements allowed by project managers



## WORLD BEATER: TOP THREE LONGEST TUNNELS ON THE PLANET

**1) 57km**

Gotthard Base Tunnel

**2) 53.85km**

Seikan Tunnel (Japan)

**3) 50.5km**

Channel Tunnel (UK to France)

### BUT HOW LONG WILL GOTTHARD'S RECORD STAND?

Future contender:

Bohai Strait Tunnel (China)

Estimated length:

**123km**

Projected cost:

**\$42.4bn**

### ON THE RAILS: FIXTURES AND FITTINGS

**2,600km**

of fibre-optic cable

**3,200km**

of copper cable

**7,200**

lights

**1,900**

electrical cabinets

Safety exits every

**325m**

### DIGGING FOR EFFICIENCY: VITAL GAINS

#### 1 MILLION

freight trucks will be removed from local roads per year, to be replaced by the tunnel's trains

#### 40 MINS

time saved travelling between Lucerne and Milan

#### 67%

projected increase in daily passenger numbers by 2025 (15,000 per day expected – 6,000 more than the older Gotthard rail route)

#### 25%

projected increase in total daily freight by 2020 (from 1,600 tonnes to 2,000 tonnes)

#### 325

number of trains that authorities want to traverse the tunnel each day (260 freight trains, 65 passenger trains)

### NUTS AND BOLTS: THE FIGURES BEHIND GOTTHARD'S 'SLAB TRACK'

**131,000m<sup>3</sup>**

of concrete

**308km** of track

**380,000** sleepers

**43,800** hours of non-stop work

## BLOCKBUSTER BUILDS

Three more vast construction projects in the transport arena

### Yavuz Sultan Selim Bridge, Turkey

**Cost: \$3bn**

**Duration: 27 months**

Opened in 2016, this suspension bridge – also known as the Third Bosphorus Crossing – is the world's widest, at 59m. With a span of 1,408m and a dual-lane rail system, it is also the longest suspension bridge ever to include an integrated railway. Its 322m main tower dwarfs that of any other bridge of its type. Comprising eight highway lanes, the bridge was designed primarily to ease severe traffic congestion in Istanbul. Car trips over the Bosphorus strait now take 15 minutes, reduced from one hour.



### Panama Canal expansion project

**Cost: \$5.5bn**

**Duration: Nine years**

This ambitious build was approved when officials saw that the Panama Canal in its original form could no longer handle growing numbers of increasingly large cargo ships. No wonder – the shortcut between the Atlantic and Pacific oceans originally opened in 1914. A massive and radical excavation made way for a new set of locks – some of which weigh 4,200 tonnes – supported by infrastructure that soaked up 4,400,000m<sup>3</sup> of concrete. At the June 2016 opening of the canal's new section, a giant Cosco ship carrying 9,000 containers passed through.



### Second Avenue subway, US

**Cost: \$4.45bn**

**Duration: Ongoing**

Under discussion for around a century before work commenced, New York's Second Avenue subway will run over 13.7km along the city's East Side, providing commuters a relief from jam-packed trains. It is the first major expansion of New York's subway system for 50 years. Work began in 2007.



# DELIVERY BY DESIGN

Christian Bason is passionate about the role design thinking can play in achieving the best possible outcomes in the public sector. **JO RUSSELL** talks to him about his vision

**In many organisations, design is no longer** simply the preserve of the creative department, busy conjuring up aesthetic new products. Design thinking is increasingly being adopted as a means to tackle ever-more-complex scenarios – nowhere more so than in the public sector.

Design thinking focuses squarely on the user. If a product can be designed with the end consumer in mind, so the thinking goes, why can't the same approach be adopted for the way in which processes and services are designed? In this way, the end result could be something simple, intuitive, pleasurable to use and, ultimately, more effective.

"Public sector design is about creating more value for people," says Christian Bason, CEO at Danish Design Centre, an independent organisation funded by the Danish government that acts as a knowledge centre on design matters for businesses. "Public policies and programmes ought to be run on the basis of how they impact people's lives, and how they can better achieve citizens' objectives. Design is an approach to solving problems and developing

innovative solutions that is human-centred, experimental and challenging in nature."

## THEORY IN PRACTICE

To illustrate this, Bason uses the example of the Heart Centre at Rigshospitalet, Copenhagen. The hospital had adopted lean project management to the extent that it was believed that no further waste could be eliminated. Yet more efficiencies were being demanded, together with a better, more meaningful experience for patients. The hospital sought the help of MindLab, the Danish cross-governmental innovation unit.

"We started with the end user, the patient, and framed the project around the question, 'How might we create a more meaningful patient experience?' None of the doctors or nurses had considered that to be their job. They thought their job was purely to cure patients," says Bason, a former director at MindLab.

The first step was to spend time with patients and understand their experience around the ward. The design process combined data collection from the patients with a series of workshops and collaborative sessions with nurses, doctors and external experts.

Qualitative research methods were used, including audio recordings of patients highlighting their concerns and where they saw room for improvement. Hearing these voices prompted changes in the professionals' view of themselves and their role. In the workshops, questions were raised as to how to redesign to create a more coherent, meaningful patient experience with regard to waiting times, delivering information, noise confusion and space.



"An important element of the process is prototyping," says Bason. "We asked, 'If we do something different, how will it work in practice?' We took the approach that a patient's time should be prioritised, and then planned a day where the work processes would focus around minimising waiting time for patients, and not optimising workflow for doctors."

The changes led to significant efficiency improvements and unearthed opportunities for improving medical staff workflow. Annual savings of around £600,000 were generated in addition to improving patient experience and satisfaction levels.

## DESIGN IMPERATIVE

Proven results mean that design methodologies are being embraced in the public sector both in the UK and globally. There is recognition that governments

**"PUBLIC POLICIES AND PROGRAMMES OUGHT TO BE RUN ON THE BASIS OF HOW THEY IMPACT PEOPLE'S LIVES, AND HOW THEY CAN BETTER ACHIEVE CITIZENS' OBJECTIVES"**



**"THE COMPLEXITY AND SCALE OF THE CHALLENGES GOVERNMENTS ARE FACING ARE SO HUGE THAT WE NEED NEW APPROACHES"**

constantly design, whether it is services, forms to fill out, policies or interventions. Designing a simple, intuitive, digital experience is just as important for public services as for the private sector. The hope is that a design-centred approach will engage citizens in new and more innovative ways, while dealing with an increasingly complex stakeholder landscape. And that level of complexity

can only increase with the advent of Brexit, believes Bason.

Although not from a design background, Bason explains, "I embrace design because I have seen that the complexity and scale of the challenges governments are facing are so huge that we need new approaches, new ways of engaging citizens and running projects."

#### A FLEXIBLE APPROACH

Then there is the notion of rehearsing the future. Design is about creating something that is not yet here, Bason says.

"It is about prototyping and testing, being curious about whether something will work for people, but being humble enough to get feedback. It is also important to be confident enough to discard something if it doesn't work, rather than assuming that, because it is being delivered by experts, it must be right. Lots of business programmes and

#### TIPS ON ADOPTING A DESIGN-LED APPROACH

In his book, *Leading Public Design*, Christian Bason sets out a number of different approaches required from managers in order to adopt design. The first of these is to challenge assumptions.

"People dive in without challenging the brief they have been given, especially in bureaucratic or top-down organisations," he says. "That means they may end up looking at the wrong problem or developing the wrong solution. Design requires you to have an inherent curiosity and challenge assumptions while asking new questions."

The second point is to use the insight from citizens' experiences as a lever for creating change. A critique of many projects is that, while they may lead to different outcomes or solutions, they do not deliver organisational change.

Openness is also key, Bason says: "Good managers are involved in innovation, searching for new solutions with new ideas, not just delivering the norm. That means the solutions space has to be left open for a long time while new ideas are constantly floated and tested. There is no set endpoint, and managers must be able to navigate the unknown."

public policies turn out not to work in real-world settings."

This sort of approach does not come naturally. Project managers are used to managing risk and delivering on deadlines. The lack of control posed by design is challenging, and doing something that has not been done before is inherently risky. The cultural change required will not happen overnight.

Bason's advice is to "just get started". The best way to learn is by experience, he believes: "Start by spending time with the end user and take it from there. Consultancies can help, and that will obviously have cost implications on already tight budgets.

"But I can almost guarantee that, if you work with a strong design agency, there will be benefits to both the public purse and citizens as a result," he concludes.

Christian Bason will be speaking at the APM Project Management Conference on 27 April **P**

**JO RUSSELL** is a business writer and editor



# High flier

Lucy Walton's role at BAE Systems involves managing the upgrade of the Hawk TMk1 aircraft fleet flown by the iconic Red Arrows.  
Interview by CHARLES ORTON-JONES



## LUCY WALTON

Age: 27

Current position:

Senior project manager

Current employer: BAE Systems

Years of experience: 8

Qualifications:

- BSc (Hons) project management, first-class honours, Blackpool and The Fylde College in association with Lancaster University
- Project Control Foundation Scheme, BAE Systems
- NVQ Level 3 Certificate in Project Control, BAE Systems
- APMP (now known as the APM Project Management Qualification)



**The Royal Air Force Aerobatic Team – known as the Red Arrows** – is a national institution in the UK, and also enjoys a stellar reputation internationally. Last year, the nine-pilot team completed a grand global tour, showing off its aerobatic skills in 17 countries, including Malaysia, Singapore and, for the first time, China. The mission supported the UK government's GREAT campaign, which aims to promote Britain abroad. And what better way to impress audiences than a nerve-jangling sky-dance spectacular?

The Red Arrows have continued to wow audiences since the 1960s, but the ultra-nimble Hawk TMk1 aircraft they fly are scheduled for some modifications and upgrades. In 2016, the Hawk TMk1 celebrated 40 years of Royal Air Force (RAF) service. Modifying and upgrading a fleet of aircraft is an incredibly complex challenge – just the sort of job to appeal to the new breed of project manager.

Lucy Walton is the enterprising individual running the Hawk TMk1 upgrades programme at BAE Systems. As a senior project manager, she needs to coordinate the team of more than 100 engineers, designers, technicians, supply-chain staff and pilots involved in the multi-year programme. In addition to those flown by the Red Arrows, a further 50 active Hawk TMk1 aircraft, used elsewhere by the RAF and Royal Navy, are due for upgrade. It is a huge task.

Walton admits that walking into the position took some nerve: "I'd never done anything like it."

As a fresh faced 24-year-old, she first had to win the respect of the engineers. She took a direct approach: "I'm not an engineer, but I'd like to learn. What they hate is when a project manager tells them how to do their job. You need an understanding."

The more she asked for help, the better the relationship became. "Technical jargon is one of the hardest parts," she says. "Sometimes it's about admitting you don't know. Engineers are always happy to explain the complexities." Walton also relocated to the shop floor during the trials to promote good communications and integrated team working.

### PROBLEM SOLVER

Now 27, Walton has proved her worth. Repeatedly, she has faced challenges and come up with inventive solutions. For example, testing new avionics systems requires substantial aircraft ground-support equipment. Due to operational requirements, ground equipment was in high demand, so there was an understandable reluctance to relocate the equipment for the trials. However, the equipment was essential to completing the trials, and deadlines loomed.

Walton's answer? "I proactively established contacts with each of the bases, provided a detailed list of requirements and located the equipment under pressurised timescales. I overcame their hesitancy to loan us the equipment by offering to utilise a designated

**"TAKE TIME TO GET TO KNOW PEOPLE, AND, MOST IMPORTANTLY, SAY 'THANK YOU'. IT SHOWS TEAM MEMBERS THEY ARE VALUED AND REMEMBERED"**

courier service to ship it in and out with minimal loan periods. There were a lot of shipments to coordinate over the six-month window, and a lot of saying 'thank you'!"

She rattles off a number of challenges and her responses. A pattern is clear. Whenever there is a problem, Walton takes command and cuts through bureaucracy by talking directly to the decision maker to get a resolution. When new mechanical pieces were needed immediately for the trial aircraft, she slashed lead times by seeking support directly from experts on the production line to maintain the schedule.

When regulations were introduced imposing new obligations on the programme, a pragmatic solution was needed. "Neither we nor the Ministry of Defence had previous experience of these emerging regulations, and it was an onerous task," she says.

Again, her method of resolution was to be as direct as possible: "A workshop was held to brief all impacted stakeholders, and I created a compliance matrix for the team to complete to ensure we met new regulation requirements and could identify any shortfalls. The task, on the face of it, was very daunting, and the matrix allowed us to complete the requirements in smaller, more manageable phases."

### POSITIVE THINKING

There's a special ingredient in Walton's philosophy: staying positive. She has got bundles of energy and a plain-speaking likeability.

"My boss always says networking is my strongest skill," she admits. But it is no accident – she works hard at it: "My advice would be to take time to get to know people, and, most importantly, to say 'thank you'. It shows team members they are valued and remembered. On project delivery, it is nice to take the team out; getting everyone out round a table promotes great team spirit."

As the Hawk TMk1 programme has progressed – completion is scheduled for post-2020 – Walton has been given increasing responsibility and now has a wide portfolio of duties. Her success in the role was recognised at the 2016 APM Project Management Awards, where she was shortlisted for Young Project Professional of the Year.

Walton is also a success story for the apprenticeship scheme devised by BAE Systems with Lancaster University. One of the first to enrol in 2008, she took five years, combining work and study, to achieve a first-class degree in project management.

"At university, you can learn, and then forget," she says. "But apprentices immediately use what they've learned in the workplace, so it's a massive bonus. A lot of people go to university and can't find a job after they graduate. On apprenticeships, you get the theory and the experience of applying it, without the worry of trying to secure a job when you've qualified."

This rising star plans to stay with BAE Systems for the foreseeable future. With 82,500 employees in 40 countries, the company can offer Walton a trajectory fitted to her talents. The Red Arrows may be the headline act, but the orchestra of engineers and technicians working in harmony, conducted by project engineers like Walton, is no less impressive. □

**CHARLES ORTON-JONES** is a business journalist and editor



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# PROJECT SPECIAL REPORT

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# TEACHING OLD BANKS NEW TECH

Managing change – such as increased regulation, economic upheaval and technological disruption – is driving banks to adopt more speed and agility in their project delivery, writes **KEVIN REED**

**In a world where business has few certainties to cling to, the banking and financial services (FS) sectors could make a strong case that they face the greatest, most fundamental challenges ahead.**

Some might argue that the financial markets and lenders, who through a combination of lack of oversight and arrogance helped drive the financial crisis, deserve what they get. But that was 10 years ago – and the ramifications are still being dealt with, making it difficult for them to move on. And a healthy banking sector is vital for its corporate and consumer customers.

Stronger oversight is being implemented, slowly. And the next 12 months will see huge, fundamental regulation come into effect.

Basel III seeks to introduce stronger capital and liquidity requirements upon financial institutions – alongside more robust risk management within an enhanced governance framework. IFRS 9 is a new international accounting standard that will see problem debts shown earlier in accounts.

If these were the only concerns of the banks in 2017, then things would be relatively painful. But they are also contending, as all businesses are, with an increasingly internet- and tech-driven market. The growing use of digital in people's day-to-day lives has created expectations that FS is struggling to keep up with: better mobile offerings and broader services, all in real time.

## REAL-TIME CUSTOMER FOCUS

New market entrants, including those facing the customer and specialist service providers in the burgeoning fintech industry, are setting the bar high for institutions that have forever been used to doing things at a sedentary pace.

**"THERE IS PRESSURE ON BANKS TO KEEP UP WITH THE PACE OF DELIVERY, PLUS NEW ENTRANTS LOOKING TO GRAB MARKET SHARE WHO IMPACT THE WAY BANKS THINK ABOUT WHAT THEY DO"**

"There is pressure on banks to keep up with the pace of delivery, plus new entrants on the scene looking to grab market share who are impacting the way banks think about what they do," says Tom Merry, managing director in Accenture's UK banking strategy division. "I have sympathy for them. There's a huge amount going on: regulation, which is complicated and increasing; the macroeconomic backdrop; interest rates cramping margins; and customers or clients being more empowered and expectant."

So, despite the headwind – more because of it – banks must change. They must become better at managing risk, be more financially robust, and yet be able to invest and flex depending on both the rapidly evolving economic climate and customer needs.

Change programmes, and the projects supporting them, are about business transformation and new digital products – which all affect legacy finance/IT teams and systems. Oh, and holding more capital gives you less capacity to invest. So, what's to be done?

## SMALL IS BEAUTIFUL

Institutions built on huge, legacy, siloed databases cannot just reconstitute them for the 21st century. Instead, banks are running numerous smaller projects that are aimed at providing discrete customer solutions, according to Nick Sherrard, managing director at customer proposition consultancy Market Gravity.

Sherrard, whose firm has recently worked with Standard Life and Clydesdale, says that agility comes from the formation of cross-functional teams – from different disciplines and with different backgrounds



– looking to solve a problem or find a solution based on a commercial driver.

Short- to medium-term projects need a mix of task orientation, with flexibility to allow individuals responsibility. Flexibility in the aim of the project is important too, Sherrard says: “What are you willing to bend on? If something has to be live in six months or you lose out to the competition, what parts of the project can we flex on?”

“Gone are the days when banks undertook a project because it seemed like a good idea at the time,” says Howard Berg, managing director at data security outfit Gemalto UK, who has seen a ‘160-day rule’ implemented in FS organisations: if a project is likely to take longer, that incarnation is shelved.

“There is more immediacy, but with proper objectives and milestones, based on customer expectations,” he adds.

## EMBEDDING COMPLIANCE AND CUSTOMERS

Many regulatory requirements are about process change or documentation, and not necessarily technical, Berg believes.

To mitigate the financial and resource cost of meeting regulation, such projects should be built into those focused on the customer.

Culturally and organisationally, departmental projects are disappearing, Berg says, concurring with Sherrard. Security projects often have to flex as new frauds occur.

“The nearer that FS gets to retail [in terms of customer interaction], the more agile it has to be. People expect the immediacy. Agile is the keyword in the market, but with a process-driven methodology,” Berg concludes.

Agility doesn’t mean that the back office leviathans of finance and IT are left out of the equation – which would be near impossible for any type of business, let alone the financial data-driven exploits of banking. So where do they fit?

## BACK OFFICE AT THE FOREFRONT OF CHANGE

The heads of both finance and IT have seen their roles expand and become more forward facing, with the respective functions providing more strategic support to their organisations because of it. Berg sees their involvement at the very start of the plan – rather than parachuted in at delivery phase – as crucial: “Although accountants must play the gatekeeper and audit roles, they now act more like consultants.”

The ability to analyse customer data and act on it means that IT will play a crucial role in legacy banks keeping up with the pace of change in the market.

Rather than rebuild their databases, banks are adding an interfacing layer, or an ‘adaptor’, that enables new technology to work with legacy systems, according to John Lyons, PwC’s leader of retail and commercial banking, and EMEA FS technology.

“They are building flexibility for the future,” he says. “Real-time analytics are needed to manage customer expectations. More agility, more insight – what would have been a two-year journey can be achieved in weeks or months. They can test and learn far quicker.”

Another important part of the ‘agility’ piece is involvement from executives, without whom projects inevitably slow down, according to Merry. They are displaying more accountability and involvement on a day-to-day basis, he believes.

“C-suite people are going into project meetings and walking the floors of the office, because the model for change allows them to get access. In the old days, projects were a 100-page document that no one wanted to read, which was then broken up and handed down,” Merry explains.

It’s not all sweetness and light, however. Banks are “still struggling” to be nimble, says Lyons. They could be smarter about how they approach their portfolio of work, he explains – with Brexit an example of an issue that will inevitably translate into ‘another project’ for banks to handle.

Echoing Berg’s thoughts, Lyons says a more strategic approach could see them roll projects into each other, rather than running multiple iterations – but the tech platforms need to be in place to enable this change: “For some, it’s easier to do it the same way. It’s difficult to step back and say ‘Let’s do things differently.’” □



**KEVIN REED** is a business journalist and former editor of *Accountancy Age* and *Financial Director*

# THE MULTIMILLION-POUND PMO: 10 THINGS YOU NEED TO KNOW



Most of us are familiar with the proverb 'good things come in small packages'. As project management offices (PMOs) expand to span divisions or even whole enterprises, many of us find ourselves managing larger and growing portfolios. At the same time, we are proving good things

can also come in big packages.

By following the top 10 dos and don'ts explored below, you will be able to navigate challenges and avoid some of the most common pitfalls in managing a large portfolio.

## 1 GET ORGANISED BY DEFINING A PORTFOLIO HIERARCHY

Although each project is important, all things are no longer created equal. Agree a portfolio hierarchy with senior management and confirm which initiatives are most critical for the portfolio. Not only does this set priorities for your PMO, it will also illustrate the escalation path for risks and issues that arise in the portfolio.

## 2 SET STANDARD REPORTING PERIODS

Establish and agree with senior management the fixed intervals (eg monthly, fortnightly, weekly) to gather status information from the portfolio. Use the most recent version to feed all reporting needed until the next time the data is refreshed. Not much will change between periods, and this will prevent a vicious circle of continual updates and discrepancies when two reports issued around the same time reflect different statuses. However, in the event that something major has changed between reporting periods, a verbal comment or text footnote may be added to highlight this update. If you find this happening often, you should consider a more frequent period for refreshing the information.

## 3 INVEST IN PROPER TOOLS AND REPORTING

With a large portfolio, it is critical to be able to slice, dice and drill into the data that is captured. Sophisticated data-warehousing and reporting tools are nice, but it is always helpful to have a Microsoft Access or Excel guru in the PMO who can design and create tools and reporting quickly to massage the data into the different views you need. Adding the right 'tags' to existing data will often give you the additional information requested without having to design an entirely new process to capture it. For example, by tagging existing milestones reported as 'regulatory' where applicable, a regulatory milestone roadmap can be created using existing data.

## 4 DRIVE STANDARDISATION

Encourage stakeholders to source from the data and reports provided by the PMO, instead of building their own separate tracking and reporting. This not only helps avoid unnecessary reconciliations between their data and yours, it also improves quality. Push to have this standard reporting used for all governance bodies. Be assertive – there is only one version of the truth, and that is what the PMO creates. When project managers know that their

submission will be seen by senior management, they will pay much more attention to the quality. Standardisation also saves resource time, with effort spent on one report, rather than several.

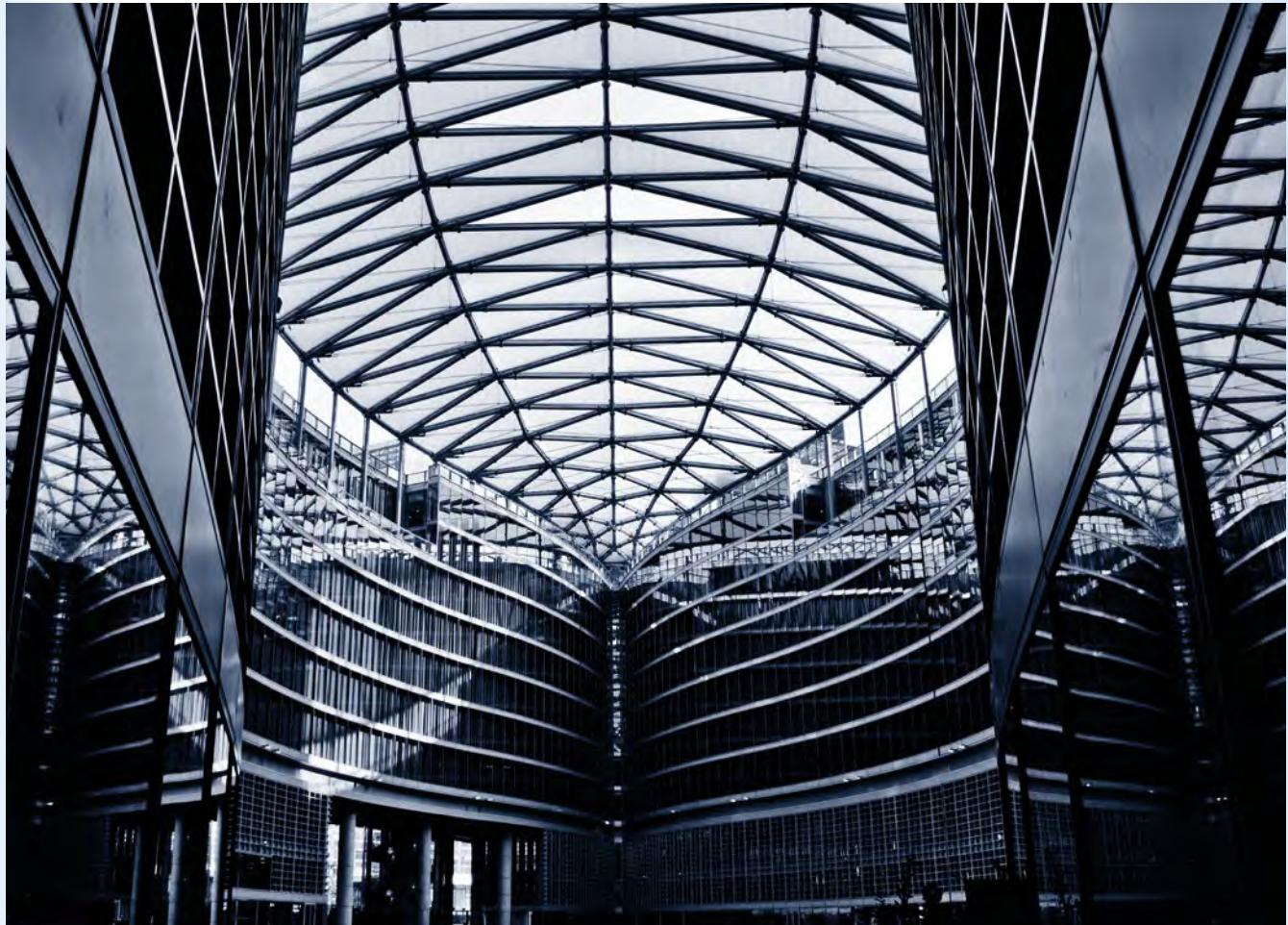
## 5 KEEP IT SIMPLE

Both those providing and those consuming PMO information have many other roles and responsibilities beyond their interaction with you. Do not over-engineer your processes for the sake of designing a top-of-the-line process. Communication should be in the language and frame of reference of the target audience. It is the responsibility of the PMO to take the time to communicate in a clear manner, rather than putting this burden on your stakeholders.

## 6 COMMUNICATE A CONSISTENT AND UNIFIED MESSAGE

The larger the PMO team, the greater the risk of ineffective communication, with the left hand not knowing what the right hand is doing. Formalise a communications plan that allows you to leverage existing meetings and communications, along with consolidating requests from various PMO sub-teams to the same stakeholders for information. The PMO team should avoid scenarios such as sending an email on Monday requesting a response on financials due on Wednesday; sending an email on Tuesday requesting a response on resource plans due on Thursday; or sending an email on Wednesday requesting a response on status due on Friday. One email should go out requesting a response on financials, resource plans and status due on the same day, or as close together as possible.

**AS THE SIZE OF THE PORTFOLIO INCREASES, YOU WILL NOT BE ABLE TO KEEP UP WITH THE CONTENT, AND NEED TO RELY ON THE PROJECT TO PROVIDE THE HIGHEST QUALITY OF INFORMATION FROM THE START**



SHUTTERSTOCK

## 7 BE CLEAR ON ACCOUNTABILITY

You will no longer be able to know it all. In smaller portfolios, it is easy to correct careless mistakes and improve the quality of information reported, as you are familiar with the subject matter. As the size of the portfolio increases, you will not be able to keep up with the content, and need to rely on the project to provide the highest quality of information from the start. Define clear roles and responsibilities, and reinforce that the PMO is responsible for the reporting and transparency of the portfolio, while the actual content is the accountability of the project.

## 8 KEEP TRACK OF 'FIRE DRILLS'

One of the biggest time killers is responding to unplanned and often urgent requests from management. Before

beginning to gather the information, make sure you truly understand the question. At times, the requestor does not know exactly how to ask for what they need. By digging just a little deeper, you may find that you already have the information to hand. Most ad hoc requests turn into routine requests in the future, so determine a way to incorporate the task into the PMO book of work to avoid it becoming another 'fire drill'.

## 9 EMBRACE BEING AN ENABLER

Always remember that the PMO does not actually deliver the end product of the organisation. Although you are a valuable ally for the projects and the first line of defence of the portfolio to senior management, delivery should, and will always, come first. Use this to your advantage when working with your

stakeholders by positioning your PMO as one that solves rather than creates problems.

## 10 STRIVE FOR EFFICIENCY AND SAVINGS

Regardless of how essential and helpful the PMO is, it is a cost centre, as opposed to a revenue generator. PMO expenses take away funds that could be applied to delivery, so you should continually strive to keep your PMO lean and efficient. Do not assume that your costs should grow at the pace of the portfolio. With the right portfolio hierarchy, tooling and reporting, the PMO should be able to scale to the size of the portfolio. Often, the solution is not adding staff or costs, but instead improving the processes. When costs come under pressure, do not be afraid to renegotiate the PMO's level of service with senior management.

**The PMO discipline has become more advanced, with an increasing number of organisations really understanding its value. Each PMO encounters its own unique situations, but, with the 10 tips listed above, you will have an idea of how to start tackling your issues. Hopefully, you will discover that good things come not only in small packages, but also from your PMO. □**



**MICHELE ECHOLS**  
is a director at a financial services firm, leading the global project portfolio services team in the risk and finance IT division



What programme management challenges does the notoriously complex world of financial services present? *Project* gets the inside story from **KARL WILLIAMS**, financial services practice lead, and **DAVID ARRICK**, management consultant, at project and portfolio management consultancy Pcube

# THE TASK AHEAD

## Large-scale transformation programmes have been a major priority for the banking sector since the financial crisis struck. Why?

**Karl Williams:** Before the crisis, banks were focused on growth. They were expanding in new markets and acquiring new businesses, especially in Asia-Pacific and South America. But once the crisis happened and regulation tightened, they moved towards strategically rationalising products, systems and people.

**David Arrick:** Every decision that banks have made, and every programme they have kicked off, has been around cutting operational costs and finding more effective and efficient ways of working. But that is not a particularly strategic way of thinking, so the next raft of programmes and projects is likely to be more forward looking.

## What particular challenges are associated with bank transformation programmes?

**DA:** Large-scale change involves large-scale investment, and the two don't sit particularly well with the procurement and finance teams that are funding these programmes. There is

pressure on teams to submit effective business cases that set out the detailed benefits that the programme will deliver.

**KW:** Banks have been hit by some pretty profound regulatory changes. A few years ago, 70 per cent of a bank's change budget was put into regulation in some cases. Even now, I suspect it is still somewhere around 50 per cent.

**DA:** A lot of the programmes of work are focused on the cloud automation of activities like testing, and creating more flexible ways of working. When banks want to put customer data in places like the cloud or digital infrastructure that crosses multiple geographies and national boundaries, they come across problems with regulations that kick off a stream of other activities.

I was recently involved in a large-scale assignment that involved a bank outsourcing all of its infrastructure operations to one external provider. When the programme went through its initiation and delivery phases, we had to get regulatory approval from 34 individual regulators. That probably added an extra 200 days to the normal project timeline.

For this outsourcing engagement, we also needed to change the legal entity structure – the intra-group agreements that

**"PROJECT MANAGEMENT IS CHANGING BECAUSE PEOPLE WANT TO DELIVER FASTER IN A MORE COLLABORATIVE MANNER. WHETHER IT IS SCALED AGILE OR SOME OTHER FORM OF AGILITY, IT WILL FUNDAMENTALLY CHANGE PROJECT MANAGEMENT AND THE ROLE OF THE PMO"**

**KARL WILLIAMS**, FINANCIAL SERVICES PRACTICE LEAD, PCUBED

outline their regulatory commitments – for every single legal entity within the bank. This bank was structured into more than 100 legal entities, which sat within five regions, which sat within eight top-level intra-group agreements. The stakeholder management challenge was particularly tough to manage.

#### **How is the digital revolution impacting the work that you do with financial services clients?**

**KW:** It means people want to deliver faster, and are delivering faster, through approaches such as scaled agile. For example, a major mutual bank created a mobile app that has Touch ID, essentially using a scaled agile premise.

But, generally, we have found that, while banks want to take an agile approach to project management, they are also usually forced to take a traditional waterfall approach. So, in major programmes, they have got to do both well. There is a real debate about how banks can scale their project and programme management capability to deal with both, as well as manage the challenges of the programme itself.

#### **Are there any elements of project management best practice that really matter in financial services?**

**DA:** There are some relatively strict requirements around confidentiality. In a number of cases, no information – written and verbal – can leave the programme and project rooms.

Also, it is fair to say that financial services programmes tend to be global. We usually complement our teams in London with teams based in other financial services locations, such as Frankfurt, New York and Singapore.

#### **Now we've had more clarity on Brexit, how do you expect it will affect project management within financial services?**

**KW:** A lot of major change programmes within banks are actually run from London. There are two reasons for that. One is that there is a lot of talent in the UK and in Europe; the other is the time zone. London is in the right place between New York and Asia-Pacific, so we think that it will continue to be one of the key hubs from which banks look to manage change.

#### **Is Brexit going to lead to extra work for project managers?**

**KW:** I think it will. European law will effectively become disaggregated from

UK law. Banks will have to deal with changes to money flows and legal entity structures, and the wider implications around labour mobility.

#### **What role will artificial intelligence (AI) play within financial services?**

**DA:** Banks have a lot of unstructured and unmanaged data swimming about in their servers, which is a big problem for them, so I think we are going to see a lot of feasibility studies for the use of AI in data categorisation. We will review how we can engage and support our clients with that from a programme management perspective.

#### **How do you see project management in financial services evolving over the next 10 years?**

**KW:** The role of project management is changing because people want to deliver faster in a more collaborative manner. Whether it is scaled agile or some other form of agility, it will fundamentally change project management and the role of the project management office (PMO). We have invested heavily in scaled agile because we believe there is going to be an increasing need to manage in that way. We've also invested a lot of time in understanding how agile and traditional waterfall work together.

**DA:** The role of the PMO tends to be quite fragmented at the moment. In any given organisation, you have some project teams that have their own individual PMO and their own staff team. But we are going to see a centralisation and consolidation of those PMOs. They will probably become a centrally aligned service that is more akin to a portfolio function. We are aiming to offer our clients project management and PMO specifically as a managed service.

**KW:** We have provided a managed service for Airbus for 15 years, supplying project managers into its major programmes. Recently, banks have also asked us to pitch to provide an outsourced PMO service.

Banks want consistency of project management quality – especially if they have used a proliferation of contractors and found they can't retain intellectual property or necessarily guarantee consistency. Having dealt with a lot of change over the past five years, banks recognise the need for improved quality in managing change at all levels of their organisation. □



**"BANKS HAVE A LOT OF UNSTRUCTURED AND UNMANAGED DATA SWIMMING ABOUT IN THEIR SERVERS, WHICH IS A BIG PROBLEM FOR THEM, SO I THINK WE ARE GOING TO SEE A LOT OF FEASIBILITY STUDIES FOR THE USE OF ARTIFICIAL INTELLIGENCE IN DATA CATEGORISATION"**

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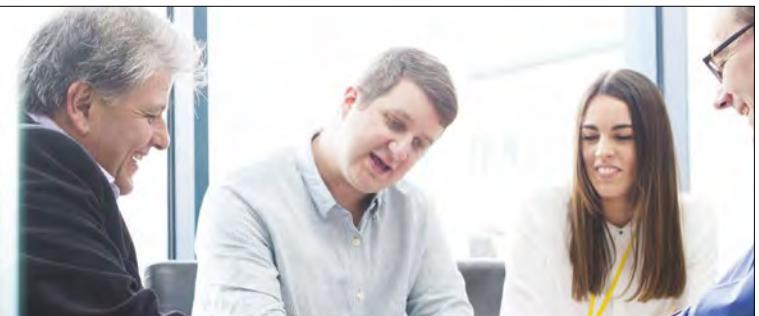
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# Why a compass is better than a map

Increased stakeholder visibility, combined with more uncertain political and economic environments, means that project managers need to adopt different strategies to ensure a greater chance of project success

## Imagine the perfect project. Your team is motivated and self-organising.

The client and service providers have an excellent working relationship and frequently come up with improvements to product or process. Everyone understands the project objectives and delivery strategy, and team members can identify issues and adapt calmly to changes. Emails and meetings are useful and productive. Planning activities are positive and take up little time. You are on the way to project success, and it is not a constant battle, but a pleasant journey.

To a cynic or even a realist, this is a far-fetched utopia. However, when faced with the gap between the way things are now and how much better they could be, there are always two choices: lowering expectations to bring the vision closer to reality, or the braver option of pulling reality towards the vision.

## PROJECT SUCCESS: APPROACHES AND PROBLEMS

Project success is usually discussed in terms of:

- **criteria for success:** what needs to be achieved; and
- **critical success factors:** how it should be achieved.

Historically, success was defined in terms of the 'iron triangle' of scope, budget and schedule – but definitions of project success are increasingly taking a broader view that focuses on the value to stakeholders, including post-project delivery. It is now generally accepted that an emphasis on stakeholder satisfaction is just as important (if not more so) than simply meeting quality or functional requirements for a given cost and schedule.

Since the 1960s, the term critical success factors (CSFs) has been used to define a specific set of areas in which things 'must go right' to meet pre-determined goals. CSFs are therefore a key focus for measurement, control and decision making. Research has sought to establish generic CSFs for project success, mostly



IT IS NOW GENERALLY ACCEPTED THAT AN EMPHASIS ON STAKEHOLDER SATISFACTION IS JUST AS IMPORTANT (IF NOT MORE SO) THAN SIMPLY MEETING QUALITY OR FUNCTIONAL REQUIREMENTS

## VALUE v VALUES

The word 'value' is used in two main contexts in project environments. Values-led leadership approaches recognise the importance of both.

**Value management** originated in the US during the Second World War as a collaborative approach to secure the best functionality for limited resources. Value is defined in terms of project objectives and aspirations

from the stakeholder, and end-user perspective, teasing out needs and wants. It may consider either product or process. This is in contrast to the more recent 'value-based management', popular within management accountancy since the late 1990s, that defines value in terms of the financial benefits for shareholders.

**Values** are deeply held principles, expressed in actions and behaviours that people adhere to when making decisions. Values and behavioural norms together build an organisational culture. Much research focuses on the role of values to integrate organisations and give what Victoria von Grotdeck calls "orientation for decision situations".

## «FIVE DIMENSIONS» VALUES-LED PROJECTS



focusing on procedural, organisational or behavioural factors. However, there are two persistent criticisms of the CSF approach:

- A simple list of CSFs does not recognise interrelationships between factors.
- CSFs do not reflect the dynamic nature of projects and some factors' differing levels of importance over the life of the project.

Combined, these approaches tend to drive an emphasis on processes as a mechanism for project control and governance. However, an increasing move towards ever-tighter project controls will not always bring improved outcomes.

Requirements to follow numerous procedures can place a high cognitive load on people, leaving less energy available to deliver the thing of value. Overspecified processes can also close off thinking and dilute individual agency.

### PROJECT SUCCESS: A NEW VALUES-BASED APPROACH

Projects in uncertain and unpredictable environments need to adopt a new model to improve their chances of success.

The behaviour and decisions of the project team are critical. Research suggests that personal action is driven by beliefs about the expected outcome, and by the opinions of influential colleagues. The progress of the project may be measured in 'hard' decisions and deliverables, but it is driven by 'soft' project culture and values.

Values-led approaches to project management focus on clearly defining what is of value to the project and establishing shared values to build a project culture that supports teams and individuals.

### A STARTING POINT

- Define and agree the intended benefits of the project at the outset through a robust facilitated discussion between all stakeholders.
- Agree where these project value objectives sit on the graph (shown above). Differentiate between needs and wants, and use distance along each axis to identify the relative importance of each objective.
- Make all project decisions consistently against the agreed project value drivers – this will reduce friction and save time and energy later.

- Widen the focus to adding value rather than reducing cost – strategic cross-project opportunities may emerge.

### DIRECTION: WHY AND HOW

- Rather than seeking to define all project activities (the 'what'), project leadership needs to start by defining the project value objectives ('the why') to set a clear project direction.
- Clearly communicate project value objectives – this ensures that decisions at all levels are technically and commercially coherent.
- Allow teams to identify and prioritise activities by how much value they add. Take small steps and keep checking your bearings. This iterative mindset allows the project to use the most appropriate processes and techniques to navigate changes and uncertainties along the way, while maintaining a clear direction.
- Project leadership also needs to be about the 'how'. Build and sustain a project culture to encourage behaviours that support the team's ability to meet the project objectives.

Traditional approaches to defining project success still tend to be based on static success criteria that may not relate to broader organisational objectives, while approaches to achieving success are too focused on processes. This can lead to poor team performance. In times of change, unpredictability and uncertainty, oversimplification can lead to disaster.

A values-led management approach enables a team to start becoming the project team it wishes to be. Clearly, identifying what is important to project stakeholders, and establishing shared project values, allows project managers to set a clear course. It also gives team members the freedom and flexibility to use the best routes available to them, rather than trying to map an exact path through a landscape that may be uncertain and changing. □



KATE PARKER is a director at Agilis KLM

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# Procuring projects ethically

**PHILIP REESE** and **DR JON BROOME** discuss the risks that can be avoided and the opportunities seized by adopting a company policy of ethical procurement

'Ken dumps Barbie because of links to deforestation'. That was the essence of an eye-catching article published in the trade publication *Supply Management* last year describing how, in 2011, charity Greenpeace linked Mattel, the producer of the Barbie doll, to the deforestation of orangutan habitats in parts of Indonesia.<sup>1</sup> The link was in its supply chain: a company called Asia Pulp & Paper (APP) that had been producing paper used in Mattel's packaging.

The longer-term effects of this reputational damage were that a number of APP's global customers followed Mattel's lead in dropping APP as a supplier, creating a significant effect on its profitability and, hence, stock value. What's more, since then, Mattel's global annual sales of Barbie dolls have fallen around by 25 per cent, from just over \$1.2bn to around \$900m.

The sourcing of raw materials for use in our businesses and projects is just one of many ethical matters that we should be aware of in our position of influence as project managers. A less than careful approach can lead to significant consequences, and there are many cases in the public domain where companies have faced censure for unethical practices.

Transparency International provides some startling statistics on the perception of corruption and the impact of fraud.<sup>2</sup> For example, fraud is estimated to cost the UK more than £70bn per year. Perhaps most worryingly, a majority of respondents to one survey believe that corruption is on the rise. More positively, they estimate that, by reducing corrupt practices by just 10 per cent in a high-risk country, the country's GDP will then rise by four per cent, because the money paid for the finished goods and services can filter down to those toiling at the grass roots, instead of being sucked out by those who may be up to no good.

## SCRUTINISING SOURCES OF LABOUR

The Walk Free Foundation estimates in its latest *Global Slavery Index*<sup>3</sup> that 45.8 million people (up from an estimated 29 million in 2013) are the subject of modern-day slavery, fuelling a human-trafficking and cheap labour sector estimated to be worth \$32bn. Risk consultancy Verisk Maplecroft found that modern slavery was 'rife' in 58 per cent of 198 countries.

The Ethical Trading Initiative has also concluded through industry research<sup>4</sup> that 77 per cent of companies think there is a likelihood of modern slavery somewhere in their supply chains.

In the UK, health and safety initiatives have greatly improved the way that the final project workplace is managed, with behavioural safety initiatives becoming more widespread. But are these practices applied in the production of goods before they make it to your project? Bangladesh has been the setting

of at least three serious disasters since 2012, including the infamous Rana Plaza building collapse, in which 1,129 people died and about 2,500 people were injured. Many of the UK's high street retailers were not even aware that some of their produce came from factories in the building – which were many tiers down the supply chain. Do you really know which companies make up tiers two to seven of your supply chain?

## WHAT CAN PROJECT MANAGEMENT DO?

NGOs and other interested parties have identified several specific risk factors and industry sectors known to be linked to an increased likelihood of unethical labour practices occurring. Take a moment to consider if any (or all) of the following circumstances occur as part of projects that you are familiar with:

- Are there multinational supply chains?
- Are there any hidden tiers of the supply chain or a lack of direct contact with suppliers?
- Are any materials sourced by mining and extraction?
- Is there any use of electronics and high-tech components?
- Is there any use of steel?
- Are any materials brought to site by shipping/transport? (Of course they are)
- Is the supply chain or project work being done anywhere that has an informal economy or a culture of cash payments?
- Are products sourced from countries or regions with weak governments, areas of conflict or widespread poverty?
- Is there use of migrant workers or agency labour?
- Is there contact with raw material industries?

For a project of any complexity and significant value, the answer is almost certainly 'yes' to at least one of these questions. And we can add in some project-specific factors, such as time-driven projects where normal processes are cut to save time.

Therefore, your organisation is at potential risk of being linked to bribery and corruption, exploitation throughout the supply chain, human rights violations, modern-day slavery, health and safety failings, fraud, erroneous specification, and the supply chain not getting paid on time (or indeed at all).

This could lead to loss of reputation or profit, decreased share price, company fines and, in some cases, criminal charges against individuals. So, to understate the case, there is clearly a business rationale for managing these risks.

## TAKING CONTROL

But there are also opportunities to grasp, and best practice to share. In many parts of the world, simply getting project funding



## GET INVOLVED

APM's Contracts & Procurement Specific Interest Group (C&P SIG) is in the process of developing a seven-stage approach regarding ethical procurement governance that can be applied to identify structures, provide assurance, guard against any risks, and deliver benefits and value to a project.

The intent is to identify a framework that includes:

- **how to undertake risk assessment of ethical issues;**
  - **signposting project managers towards sources of information and resources;**
  - **methods for the prioritisation of actions;**
  - **guidance on developing appropriate policies, procedures and processes for aspects such as governance, transparency, accountability, anti-corruption, prevention and controls;**
  - **how different contracting strategies are affected by and affect ethics;**
  - **what forms of due diligence exist, when to use them and how effective they are;**
  - **how we can develop trust, confidence, transparency and continuous improvement; and**
  - **how to communicate your business or project's stance on the issues that are relevant in your sector or for the project.**
- If the subject is of interest, we welcome you getting in touch. The C&P SIG is organising an event in March 2017 to expand upon these issues and develop the approach to managing ethical risks. For more information, email [c&p@apm.org.uk](mailto:c&p@apm.org.uk) or visit [bit.ly/2kxeMgg](http://bit.ly/2kxeMgg).

(for example, funding from development banks to build roads and infrastructure), relies on being able to demonstrate that the money will be well spent and that controls are in place, so the very existence of the project depends on the ability to procure your project ethically.

There are other opportunities, too:

- **Elimination of bribery and corruption reduces 'expediting' costs.**
- **Paying faster often reduces the price you pay.**
- **Procuring and contracting ethically can also have a very positive effect on the supply chain and wider society.**

Doing the right thing

improves your organisation's reputation, which means other organisations – whether clients or suppliers – will want to work with you, giving you more favourable terms etc. In addition, anecdotal evidence suggests that businesses can often also attract brighter talent on the back of an ethical reputation, which is increasingly important in a 'skills shortage' world.

## DELIVERING ETHICAL PROJECTS

So, how do we go about making the projects we deliver more ethical? The answer is partly cultural and partly attitudinal, ie it involves reflecting on your moral compass and not knowingly encouraging or letting these practices occur in your project or organisation.

This starts with how we behave and conduct ourselves on a day-to-day basis as role models, and what we call people to task for. The higher up we are in an organisation or project's hierarchy, the greater our influence. However, that is not enough either practically or legally.

It is far better to take a positive approach to considering ethical concerns and acting upon them at various times during the project's life cycle.

For example, at project set-up: decide whether the project is ethical and the right thing to do in the first place; identify

less well-known suppliers or across borders.

Finally, make sure that you have policies and procedures in place for dealing with so-called associated persons, agents or any intermediaries.

Above all, as project managers, we must ensure the very highest standards of ethical procurement are adhered to in order to minimise business risk and promote better business practices around the world. □

**1** [bit.ly/2kxaYQg](http://bit.ly/2kxaYQg)

**2** [bit.ly/2jBnRVx](http://bit.ly/2jBnRVx); [bit.ly/2jtRFph](http://bit.ly/2jtRFph)

**3** [bit.ly/2kx6WmO](http://bit.ly/2kx6WmO)

**4** [bit.ly/2kxdTo9](http://bit.ly/2kxdTo9)



**PHILIP REESE** is an independent procurement consultant for Reese Procurement Ltd

**DR JON BROOME** is the chair of the APM Contracts & Procurement SIG, and managing consultant of Leading Edge Project Consulting Ltd

# The age of opportunity

To successfully deliver its infrastructure book of work, UK plc must adopt a structured approach to the scoping and prioritisation of projects, explains **PAUL TAYLOR**

**The UK has ambitious goals. It wants to make its economy more** successful (through increased GDP), more effective (with improved standards) and more efficient (with increased productivity levels).

The strategy is to make infrastructure the catalyst that will help the country improve in the decades ahead. This will mean a huge amount of economic and social infrastructure investment.

To successfully deploy this level of investment, programme management covering both strategy and delivery is the single most important enabler. We hear terms such as 'northern powerhouse', 'Midlands engine' or 'transport for a world city'. There is a buzz of excitement in the air around everyone involved in infrastructure. But, before we get ahead of ourselves, we need a reality check. The UK will need far smarter and more targeted thinking both in the strategic planning of the investment in these large infrastructure programmes, and in their capital delivery.

In the initial programme management stages, it is important to focus on a structured approach to:  
**1 objectives, benefits and outcomes,**  
**2 scope management, and**  
**3 prioritisation.**

The term 'programme management' is normally only used in the context of delivery. The purpose of the three elements above is to give sound foundations before any capital investment and delivery commences. If a programmatically structured approach to the above is not followed, the infrastructure in most cases will still happen, but the chances of it being late or over budget, or not achieving the required objectives, are vastly increased.

## FUTURE PLANNING

The UK will need time to remobilise for this infrastructure push. Although the vast sums of expenditure will occur post-2020, programmes will start in this decade.

As well as current 'shovel ready' infrastructure to be delivered pre-2020, there is a huge pipeline of post-2020 infrastructure that will need planning and, importantly, financing, with the business benefits clearly identified. The production of robust business cases will be critical, as organisations will need the support of banks and other financial institutions.

There will also be a need for sufficient people, equipment and material resources. Programme management will focus on this in the early stages. Clearly defined objectives, provided by a minimum scope and prioritised to gain the benefits as early as possible, will be crucial to ensure necessary resourcing.

## SYMBIOTIC GROUPING

In the past, large-scale programmes in the UK have usually been carried out in the regulated sectors, such as rail, water, energy transmission, nuclear and telecoms. These were either to support EU directives or maintain existing services.

However, there has been a change in emphasis. Infrastructure projects are providing a catalyst for growth; this means programmes are far more interconnected than they were previously.

It is not simply about increasing capacity on the rail network and reducing journey times. It is now about developing transport to help reshape the UK for future generations. This means that the social infrastructure requirement that is linked to economic need has to be developed.

It is easy to think that this investment is all about transport infrastructure – moving people and goods faster, thereby increasing productivity. In reality, that is only part of the equation.

## THE ECONOMIC AND SOCIAL RELATIONSHIP

Infrastructure breaks down into two specific groups. In most cases, they interconnect and are essential to each other's business case

Utilities
Communications
Energy
Transport

Education
Health
Housing
Regeneration

ECONOMIC INFRASTRUCTURE

SOCIAL INFRASTRUCTURE

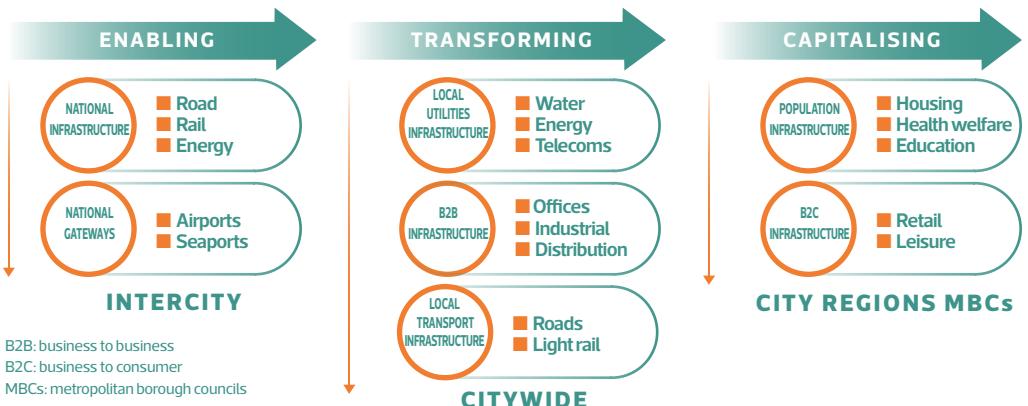
## THE INDIVIDUAL PROGRAMME OBJECTIVES AND THE WIDER CONTEXT

As funding will be key, financial institutions need to understand the overall objectives on completion of each infrastructure programme. They have to be clear on what benefits infrastructure programmes should deliver, and be aware that, in many cases, the benefits and objectives occur sometime after all the capital works are complete. This will often be viewed above the specific programme at a wider portfolio level, as the objectives will have direct relationships with other programmes. Individual programmes and the projects within them shouldn't be viewed in isolation.

The interfaces with other key stakeholder programmes will need to be clearly understood, and the associated risks mitigated. With this level of interrelated investment, it is expected that

## THE WIDER CONCEPT OF INFRASTRUCTURE PROGRAMME OBJECTIVES

This graphic shows how the wider concept of infrastructure programme objectives is first to enable the area to support inward investment by improving the infrastructure to move goods and services. This stimulates transformation by attracting B2B companies to invest in offices and factories. Then schools and hospitals are built to support population movement, which, in turn, attracts B2C companies.



there will be far more collaborative working than occurs at present, within both a host programme and other associated infrastructure programmes.

### DEFINING BENEFITS MANAGEMENT

With regard to benefits management, scoping or prioritisation, individual sectors have been allowed to develop their own ideas and techniques. While best-practice documentation is widely available, its adoption and uptake are relatively low. In many cases, best-practice documentation is at a high level, and professional bodies have a role in assisting sectors in developing and aligning techniques to reach an overarching consistency and quality.

Benefits management has to be used throughout each individual programme life cycle; the methodology should be specifically tailored for the programme down to individual projects. Realisation is then continuously tracked through the life cycle of the project and programme. If the benefits deteriorate, the specific project or programme's overall business case becomes threatened and rectification processes are required. Again, due to wider interrelationships with other programmes, the impacts are amplified.

### PROGRAMME SCOPE AND PRIORITISATION

As infrastructure outcome requirements are defined, the capital scope needed to achieve those outcomes has to be challenged. The need for infrastructure has to balance with value for money and return on investment (ROI) for the multiple stakeholders.

Effective front-end scope management and categorisation techniques such as MoSCoW<sup>1</sup> are well defined and documented, but, as of yet, not used effectively in infrastructure programmes. Their primary role is to confirm the minimum scope requirements that are needed to deliver the objectives of the capital programmes.

The best-in-class business processes that are available in this field should be adopted to minimise scope requirements while still providing the necessary outcomes of the programme. This will usually result in lower expenditure and maximising ROI.

Scope prioritisation and categorisation also has other benefits with regard to delivery timescales. By applying effective scope management, in most cases, the reduction in scope requirements also results in a reduction in deployment times by altering the focus on the most important items to maximise benefits and outcomes.

All scope requirements are important. However, if the projects that form the programme's scope are prioritised to deliver the greatest and most immediate business benefits as early as possible, it significantly improves the overall perception of the programme. This, in turn, accelerates value and ROI for stakeholders.

One way organisations prioritise the projects in a programme is by developing a standard, structured approach using ranking criteria for each of the key benefits of the overall programme, and then measuring each project against those benefits.

Understanding which projects are needed first can maximise the ROI for shareholders, help customer satisfaction and maintain engagement in the delivery programme. It is important to see tangible improvements over the programme's life, and not just at the end. By prioritising correctly, these objectives can be time phased, allowing a continuous management of expectations on top of improving overall business performance. As part of the ranking criteria, strategic delivery risks have to be accounted for. This reduces optimism bias and brings an increased realism to the priority process.

### BE PATIENT

There is a need to release work at a controlled rate, which can encourage a balanced per annum sustainable growth in the supply chain, but with checks and balances to prevent the sector overheating with increasing rates on labour equipment and materials. There will also be a strict requirement to control expenditure and ensure value for money, with outcomes and objectives, not outputs, being the order of the day.

Only after the capital programme has been effectively shaped is it time to move to the programme management acquisition and delivery cycle that people are familiar with. □

<sup>1</sup>An acronym derived from 'must have, should have, could have and won't have but would like'



**PAUL TAYLOR** is head of programme development in the UK at MWH

# A flexible approach

**TIM BANFIELD** outlines five key strategies to help deliver effective projects in these uncertain times

## Projects are the way governments and commercial organisations

deliver improved social, economic, business and environmental outcomes. Here we explore five strategies to enable senior leaders to ensure that their projects are successful:

- 1 developing deeper relationships with stakeholders to understand the diversity of perspectives on what successful outcomes are;
- 2 adopting a smarter, adaptive approach to change;
- 3 planning and managing major projects differently so that key outcomes are delivered earlier;
- 4 considering smaller-scale projects where benefits are realised sooner as part of a balanced portfolio; and
- 5 prioritising better project initiation to ensure schemes are ready to proceed when the time is right.

The project delivery landscape is changing rapidly. Low interest rates have made borrowing to invest in long-term projects more attractive than ever. Events such as Brexit have made the economic landscape uncertain, and business cases must convince against a range of new scenarios.

Consumers are more demanding and impatient to receive immediate benefits. Allied to rapid technology evolution, the inevitable political indecision and unexpected global events, the challenges to effective project delivery are multiplying. As learned while developing techniques to help a client respond cost-effectively to the Fukushima disaster, organisations and projects

must be able to absorb the shock loading that occurs during an economic or societal earthquake and continue to perform. Yet the track record of delivering successful world-changing projects is, at best, varied. Organisations need to act differently to secure the anticipated beneficial change from projects.

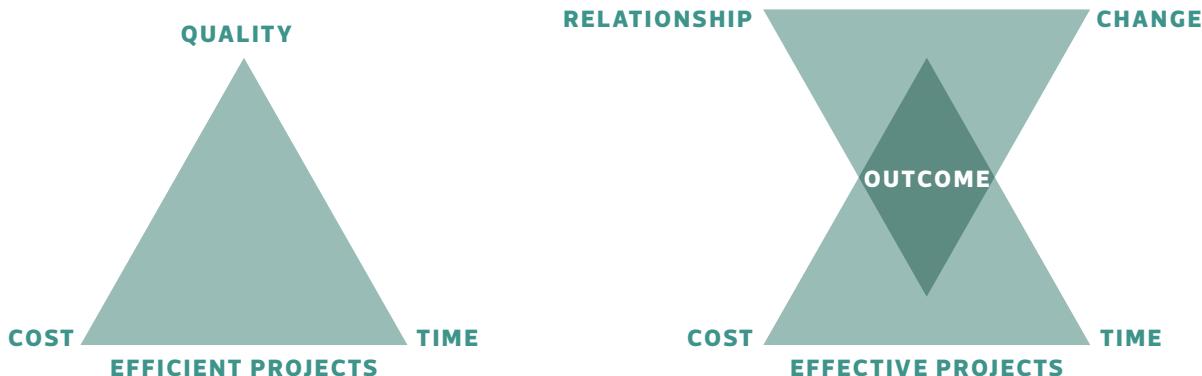
Today's increasingly virtually connected world means transparency is optimal and interested parties are more connected to infrastructure projects than ever before. It offers new and powerful outlets. There is greater opportunity for divergent views and dissatisfaction to be expressed, making projects more political than ever before. Conversely, the proliferation of media channels provides new opportunities to engage with citizens and customers in different ways, and to achieve outcomes through a broad range of delivery approaches.

Traditionally, the focus has been on doing projects efficiently – the ‘iron triangle’ of cost, time and quality beloved of project managers. Efficiency of delivery is important, but is no longer sufficient. Understanding diverse and conflicting stakeholder perspectives and motivations is crucial to enable organisations to balance tensions, and plan and deliver projects effectively.

## CONSIDER PROJECT OUTCOMES

To achieve an effective project requires an outcome-centred approach where projects are a living cycle, delivering benefits

### EFFECTIVE PROJECTS FOCUS ON SUCCESSFUL OUTCOMES





## THERE IS NO SUCH THING AS BEST PRACTICE; RATHER, IT IS WHAT IS APPROPRIATE IN EACH GIVEN CIRCUMSTANCE

throughout, and better reflect our complex and uncertain delivery landscape. The difference between an efficient and an effective project is shown in the diagram on the left.

Adopting an outcome-centred approach means challenging accepted thought processes. Viewed through a more traditional lens, delivering infrastructure may be complicated, and cause and effect are self-evident, so plans can be made and stuck to religiously and traditional best practices applied.

In our experience, this is often not the reality, due to the many variables and unknowns. There is no such thing as best practice; rather, it is what is appropriate in each given circumstance. Effective organisations adopt approaches that help leaders handle the complexities. An outcome-centred approach places a premium on experience, relationship building and using diverse data sets both to predict and manage the effects of change positively.

London's Crossrail has adopted an approach that could be characterised as 'disciplined flexibility' in response to the inevitable changes, and a lively approach to innovation to maximise the opportunities presented.

### THINK ON A SMALLER SCALE

One way to faster benefit realisation is to commission more small-scale projects. The benefits of this type of approach were highlighted in *The Eddington Transport Study* of 2006, which concluded that "small junction improvements often cost below £20m but show wider [benefit cost ratios] well in excess of 4 and some are between 8 and 10".

There are, however, risks associated with relying too much on smaller projects. We have seen cases where projects were poorly managed, lacked quality resource and did not benefit from economies of scale because they were deemed 'small' and did not receive sufficient priority.

Sir Rod Eddington recognised the importance of balancing investment in both small and major projects, particularly where sustained demand growth meant new capacity schemes were needed. The challenge for senior leaders is how such short-term enhancements can be designed to provide value and fit into

a wider delivery plan. Similarly, when major projects are required, these could be planned and delivered differently so that benefits are gained and demonstrated throughout the project timeline. Careful consideration must be given to the outcomes that are important from a political, wider stakeholder and project management efficiency perspective.

These approaches have implications for the way senior decision makers plan future projects and take decisions on which projects to commit to. In times of uncertainty, organisations should take care to ensure that the full range

of potential outcomes from the project have been scrutinised and that vulnerability to change is clearly understood. This might mean deeper exploration of the business case, stakeholder needs and expectations, and refraining from fixing solutions too early. By investing adequately in the project initiation phase, organisations can be ready to move forward quickly when circumstances make schemes more relevant or affordable.

Restructuring project portfolios and management strategy may be necessary to recognise the benefits of delivering different types of outcome at different times and prioritising designs accordingly. For example, delivery of a major road-capacity project might be structured as an incremental series of junction and highway improvements that reduce the most severe bottlenecks quickly. The end product remains the same, but the approach will show more improvements in the early stages and give more opportunities to recognise and share successes with stakeholders.

### THINK OUTSIDE THE BOX

In conclusion, successful project delivery is central to healthy organisations whether they operate in the commercial or public sectors. The environment within which projects are planned and delivered is becoming ever more uncertain, complex and contradictory. The limitations of traditional approaches are becoming increasingly apparent. Senior leaders need to think and act differently if they are to secure the full range of anticipated beneficial changes from the projects they undertake in a timely manner. An outcome-focused approach characterised by disciplined flexibility is key. Relationships between delivery partners, clients and diverse stakeholders must be more engaging and intuitive.

Early benefit delivery can be a valuable tool in winning public support for infrastructure investments. Well-planned and well-executed smaller-scale projects can deliver benefits quickly, while the design of larger projects can be optimised

so that benefits are realised sooner as part of a balanced portfolio. Investing more time and resource into project initiation and scoping will ensure that organisations can move forward quickly when the time is right for projects to proceed. **P**



**TIM BANFIELD** is a consultant at The Nichols Group and an Honorary Fellow of APM

# How to unlock relational capacity

**RICHARD GEDGE** looks at the importance of establishing strong relationships with both external and internal teams to achieve optimal performance

"Of course, contracts are only a rough guide," said a Brazilian contractor with a wry smile during a payment discussion. Anyone who has managed projects in South America will know that the contracting environment there is somewhat more 'flexible' than in Europe. Corruption in the judiciary weakens the power of written agreements, so that detailed knowledge about those you are relying on becomes crucial. Building strong relationships with suppliers became imperative for that project's success.

I learned my trade as a design and project engineer building glass factories around the world. When I later had oversight of multiple projects, I began to see how the quality of relationships with partners (suppliers, community groups, etc) and within the project management team correlates with project success.

So, for example, when a project in Asia experienced significant delays and cost overruns, spending a short time in the site office revealed two groups among the site management team that were highly suspicious of each other, barely talking and certainly not collaborating well. On a different project, barriers to communicating well with a main contractor meant he had to walk off the job to get the project manager to listen to the real cost increases he was facing due to changes in world steel prices. The adversarial approach to the relationship by the project manager led to a two-week delay in that project.

On the other hand, taking time to build a strong relationship with new suppliers in South Africa developed sufficient trust and transparency that orders could be placed using local, rather than national, contractors. The less bureaucratic and more flexible collaboration saved \$10m on \$50m of contracts.

In Poland, experienced equipment installation contractors were used to waiting for detailed instruction, rather than taking the initiative. Significant amounts of time were being lost each day because they were used to a command and control culture. By addressing this issue with their site management team, taking steps to encourage autonomy in decision making (and sharing the obligatory glass of vodka), they became a highly productive unit. Respect for their knowledge and modelling of a no-blame culture built levels of trust that they had not experienced before with a client. They said it was one of the best jobs they had worked on.

## MANAGING YOUR TEAM

Within a project management team, an overbearing leader crushes both individual creativity and relational connections by controlling the sphere of influence of team members, keeping each in their role or 'silo'. On the other hand, if a project leader understands that one of their key tasks is to provide the right

conditions for the team to relate well, the relationships actually create capacity. That capacity means fewer balls get dropped and less misunderstandings occur, thus creating a safer environment and delivering lower costs. Investing in the team's relationships early on means the leader has extra capacity to draw on throughout the rest of the project, especially in a crisis.

I have also found that teams with strong relationships are generally smaller for a few reasons:

- The skills and abilities of individuals and subgroups are better known and can therefore be put to full use.
- We naturally try to find win-win solutions for those we have strong relationships with.
- Relationships develop opportunities for team members to contribute to the work of others, increasing chances of first-time success.
- Fluid communication between team members leads to lighter control structures.

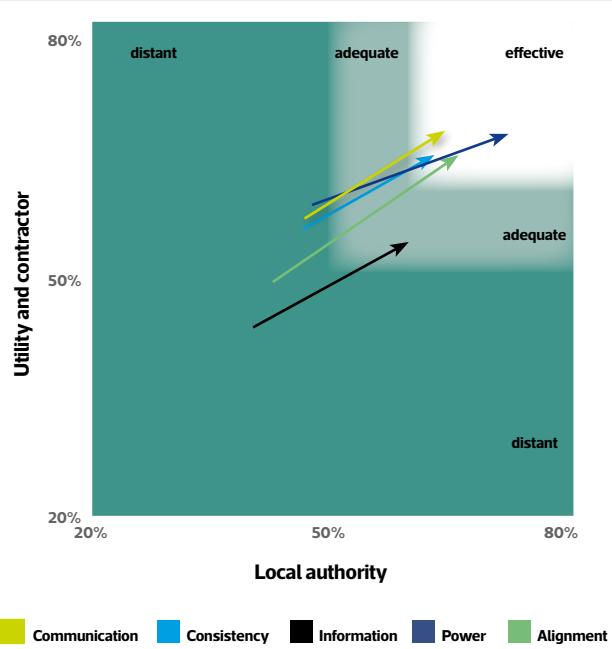


Figure 1: Change in the relationship because of the relational engineering project



SHUTTERSTOCK

## TOP 10 TIPS TO DEVELOP A HIGH-PERFORMING TEAM

**1) KNOW THEM:** Have one-to-one conversations early on with each member of your team. Understand what is going on in each person's life. You can then be generous when it matters most – for example, giving slack in a crisis or on a child's birthday. That can mean more than a pay rise.

**2) KNOW THEIR WORLD:** Know your team members' names, and their family members' names. Invite them to a family day. Dedication to the project comes not only from the person you hired, but from those who support them.

**3) ENABLE THEM TO KNOW EACH OTHER:** Help the team create strong relationships. Find regular excuses to pull people together: staff coffee, birthday cake, a team meal or celebrating a project milestone.

**4) START THE DAY CONNECTED:** If you are co-located with some of your team, spend the first 15 minutes of each day going desk to desk

saying good morning and checking in. You'll be amazed at the number of concerns you would not otherwise have heard and the stresses you can relieve. Those things save significant time and money.

**5) SERVE THE TEAM:** If you are always leading from the front, you may turn around and find no one is following. Give clear board goals, then create an environment for the team to collaborate. This allows talent and experience to be utilised to the full. Ask open questions much more frequently than you instruct.

**6) HUMILITY:** If you think you can do their job better, you'll end up doing it. Your role is to facilitate them to excel.

**7) ENCOURAGEMENT:** Go out of your way to thank people when they are doing a good job; it builds a happy, confident team. Deal with issues and failures quietly; that builds trust and loyalty.

**8) CONNECT YOUR TEAM UPWARDS:**

When a more senior person than you is around, always introduce them to team members. Don't meet them alone; instead, show off your team. Get the senior person to buy the team a meal if you can. Group success breeds sustainable business.

**9) TRANSITIONS:** When someone leaves the project team, be ready to fill the gaps. When someone joins the team, be ready to be a connector for them. Transitions can derail a well-oiled machine, so be ready to jump in on these occasions.

**10) VALUE DIFFERENCE:** A small, effective team will understand and value team members' individual skills, experience and background. Higher-performing project teams are made up of people from diverse backgrounds. This is because diversity avoids a 'groupthink' mentality.

### MAKE IT PRACTICAL

Over the past few years, my colleagues and I have been investigating whether intentional improvement of relationships within teams and systems can deliver step changes in performance. We wanted to know whether focused attention on 'relational engineering' would deliver performance results.

To do this, we are working with and developing tools to measure the key aspects of relationships between groups of people – communication, consistency, information, power and alignment. Now, with case studies across various sectors, including utilities, the NHS, local government and NGOs, we have found that better relationships are a real game changer.

For example, we recently improved relationships in a street works system between a highways authority, a utility company and a civil contractor. We measured and analysed the relational dynamics prior to bringing the three teams together for two short workshops. The data showed us that there were three key relational blockages.

Using data to describe the positive and negative aspects of relationships from the perspectives of all parties in the room gave a platform for open and honest discussion.

Together, the teams could then deal with the three issues during the facilitated workshops.

Most importantly, six months later, because of improved relationships, the teams managed to clear six years' worth of critical works that had backed up due to lack of trust. The change was made without more staff, without greater bureaucracy or better IT, and led to a decrease in fines of 30 per cent.

Project managers are used to taking care of IT, materials, energy and labour. However, those involved in delivering success in a stable workplace or project often do not realise the capacity locked up in their teams or group-to-group relationships. □



RICHARD GEDGE is a director at Renuma

# Joined-up thinking

**JOHN SHEFFIELD** explains how to execute a successful bimodal programme

Gartner defines 'bimodal' as "the practice of managing two separate but coherent styles of work: one focused on predictability; the other on exploration". We have been supporting this thinking by reviewing its application across our global client base and a number of complex transformational programmes.

When managing a programme, in practical terms, 'bimodal' means some components are executed using agile techniques, and others using more 'traditional' methods. We prefer the term 'scheduled', as 'traditional' often carries a negative connotation. Similarly, we make the distinction between 'agile' meaning the use of a recognised, agile set of techniques, and 'agile' implying simply agility and speed. The two are by no means the same.

So, how do you successfully execute a bimodal programme?

Our experience with clients has established a number of fundamental principles that drive success.

## 1. ONE SIZE DOES NOT FIT ALL

**Example:** The Scrum coaches on a client's major programme wanted to take four days to train the entire programme team of 160 people on Scrum techniques. Two-thirds were working on components that were only ever going to be executed using scheduled techniques, and the other third – the developers – already knew Scrum. It's not that the Scrum techniques weren't valuable – they weren't appropriate for the majority of the programme, and would have been counterproductive.

There's a lot of justifiable enthusiasm about the benefits of agile development. But a method is a means to an end: securing the optimum outcome possible. So, treat each component of the programme appropriately, because you want to maximise the effectiveness of each style of working.

A programme's project management office (PMO) has a new and valuable role to play in this. A team brought together on a bimodal programme will have different levels of understanding of agile, but the PMO must be well versed in all the methods needed for the programme. This allows it to facilitate the process of integrating styles of working, holding together and lubricating the operation of the programme.

**A BIMODAL PROGRAMME MUST BE EQUIPPED TO PROVIDE THE RIGHT LEVEL OF DETAIL AND PRECISION TO MATCH THE ORGANISATION'S RISK APPETITE**

## 2. KEEP THE MAIN THING THE MAIN THING

Any programme – bimodal or not – is constituted to achieve a specific result for the sponsoring organisation. The agile components of a bimodal programme must figure out how to help the programme towards that objective.

Agile handles uncertainty in requirements and solution delivery well, and there are potentially large advantages in that, but the chief financial officer and other executives of an organisation will certainly want to understand:

- what it will get,
- when it will get it,
- how much it will cost,
- what the benefits are, and
- whether it is more worthwhile to do this than something else.

Answering these questions for the agile components of a bimodal programme is always a challenge. After all, it involves defining the requirements and the solution in detail, and that's not agile. In addition, organisations vary in the extent to which they need precise answers to these questions.

A bimodal programme must be equipped to provide the right level of detail and precision to match the organisation's risk appetite.

**Example:** A non-departmental public body client working in a highly regulated environment had an established and detailed programme management framework based on 'traditional' programme and project methods. They wanted to understand how they could secure the benefits of agile and what it would mean for their framework.

Matching bimodal execution to the risk appetite of the organisation will almost always involve some degree of compromise.

A roadmap approach that charts the programme's route towards the overall objectives and goals works best. This lays out what the programme anticipates will be delivered when, and how those things relate to the programme's value. This isn't a traditional integrated programme schedule – it can't be with agile components.

Programme increments of eight to 12 weeks' duration provide breakpoints within which the programme's different working styles can be synchronised, and a cadence on which to review the programme and shape the objectives for the next increment (and the one after next in outline).

Agile development teams may struggle with the concept of committing to deliver to programme increment boundaries – it is a compromise on 'pure agile' (whatever that is) – but it will meet the needs of the sponsoring organisation.



ISTOCKPHOTO/R\_JASSON

## DIEHARD PROJECT MANAGERS CAN DISPLAY INTOLERANCE TOWARDS AGILE'S APPROACH TO REQUIREMENTS AND SOLUTION DEFINITION

Executives accountable for programmes are more likely to accept the perceived increase in risk in less detailed answers to their five key questions. Increments provide a mechanism for agreeing funding on the basis of demonstrated results, and that can go a long way to satisfying chief financial officers.

The PMO has a key role to play in devising the programme's integrated delivery roadmap, and the skills required are complex. Harmonising working styles and their approaches to planning requires knowledge of scheduling and agile, and the ability to shape the programme's structure. The PMO's role involves more effective soft skills than those required on a traditional programme. This also means more rewarding roles for those within the PMO.

### 3. LANGUAGE, CULTURE AND CHANGE

It is hard to overemphasise the importance of language on bimodal programmes. Different agile methods use very different language or, more problematically, the same words for different things. One person's 'sprint' is another person's 'increment' or 'iteration'.

A further level of confusion occurs when agile methods use similar or the same terms as established scheduled or traditional techniques. Throw in in-house methods or software development life cycle terminology, and more confusion is possible.

Behind the language are the mindsets that created the language. A bimodal programme involves multiple communities with their own world views, and, because those communities consist of people, they come with assumptions and prejudices.

Diehard project managers can display intolerance towards agile's approach to requirements and solution definition. Similarly, proponents of agile can be equally distrustful of the value of scheduled ways of working. Both communities can be – and, in our experience, often are – highly protective of their own world views.

**Example:** A client executed the early stages of a programme very effectively up to the point when the development teams were mobilised on the agile components. Not understanding the cultural shift on the programme that was about to occur, the client failed to establish clear rules of engagement before the teams arrived.

Our advice would always be to determine the programme's ways of working as primary. This enables incoming agile or traditionally minded resources to adjust to 'the way we do things around here', which is often quoted as a definition of culture.

We would also advise recognising that the amount of change management needed on a bimodal programme is significantly greater than that typically required on a traditional programme.

Creating an effective programme team is always, and has always been, a challenge. We would say the risk associated with that is greater on bimodal programmes, and it is important to mitigate that risk.

### CONCLUSION

In recent years, the various agile methods have taken great steps towards becoming normalised in IT development, and that means most programmes in the future are likely to be bimodal in nature. Learning what makes bimodal programmes successful can be a very painful process of trial and error, leading some organisations to abandon the potential benefits agile can bring.

We believe applying the right principles, the first three of which we have shared above, from day one can drive success – but what successful execution of bimodal means for every organisation is slightly different. P

**JOHN SHEFFIELD** is chief operating officer at PcubeD

“I work for a professional services firm where we've discussed coaching. How would you recommend we use coaching to drive better project delivery for our clients? ”

**Thank you for your question. I'm pleased that** you are considering the use of coaching, as it can indeed help you deliver better projects. The benefits vary depending on how you use it. Let's look at three different approaches.

### 1. USE EXTERNAL COACHES

One of the easiest ways to use coaching is to make external coaches available to your project managers. Typically, the external coach would talk through the projects with the project manager and understand where they most need assistance. A coach can help them develop better relationships with stakeholders, communicate more effectively and improve the way they lead the team. Many issues on a project relate to soft skills and being able to mediate, negotiate and have difficult conversations. In these situations, coaching comes in handy, because it helps people reflect and approach a situation differently. Coaching is less suited to train people in hard skills. It would be better to send them on a workshop or training course if they need to learn about planning, for instance.

### 2. TEACH YOUR PROJECT MANAGERS TO COACH

Another option that has more far-reaching benefits is to teach your project managers how to coach their teams in a way that is empowering and motivating. Many project managers use a task-oriented and directive approach with their teams. They are good at solving issues, providing answers and telling others what to do. This directive approach works well with junior staff, but it has a disengaging effect on senior team members who are highly skilled. What they need is a sounding board more than a boss who tells them what to do. They need a manager who



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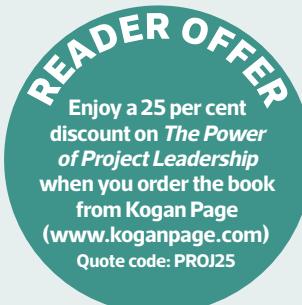
listens to them and helps them reflect on how to move forward. When project managers learn to use coaching as a leadership style, not only do they empower people to think for themselves, they also shift responsibility onto the team. They do that by asking insightful questions that encourage the team to fill in the blanks.

### 3. HAVE PROJECT MANAGERS SUPPORT EACH OTHER WITH PEER-TO-PEER COACHING

A third option – which builds on the previous one – is to pair up your project managers so that they can coach each other across projects. This is an extremely powerful and sustainable option that not only helps the individual project managers to better manage their projects, but also builds long-lasting friendships and a support network. With peer-to-peer coaching, each project manager will be given a safe space to share and discuss the most difficult situations on their project. They will benefit from the insights of another experienced project manager and, of course, practise their own coaching skills.

### HOW TO GET STARTED

When you integrate coaching into the way you run projects, you can expect your project managers to gain better leadership and emotional intelligence skills. Relationships will improve, and team members will feel more empowered and responsible for the outcome of the project. A good way to get started is to enrol your project managers in a workshop where they get to practise their coaching skills and pair up with others who they can start peer coaching. Finally, remember to give people access to an external coach whom they can work with in confidence. □



**ANOTHER OPTION IS TO TEACH YOUR PROJECT MANAGERS HOW TO COACH THEIR TEAMS IN A WAY THAT IS EMPOWERING AND MOTIVATING**

**DO YOU HAVE A QUESTION FOR SUSANNE TO ANSWER? EMAIL HER AT [MAIL@SUSANNEMADSEN.COM](mailto:MAIL@SUSANNEMADSEN.COM)**

# Jargon buster

When the project defies accepted parameters, it may be time to employ extreme project management, **BRIAN WERNHAM** explains

**Some kinds of project are difficult** to estimate. The technology involved may be too new to be sure of. There may be very different options in terms of implementation. Sometimes, the stakeholders do not know what they really want. In these circumstances, having a five-year Gantt chart of detailed activities is not just a waste of time, it can hamper innovation and flexibility.

So, why not plan on a micro-scale – just as far ahead as you can be sure of? Your plan might be for a week, a day or even just an hour. Welcome to the world of extreme project management (XPM).

## IF YOU CAN'T PREDICT THE FUTURE, DON'T PLAN IT IN DETAIL

Plan only the next step of work. Everything further into the future is ‘fantasy planning’ in XPM terms. When you are working on an innovation project, you should embrace and enjoy the unexpected – it can often reveal a shortcut forward that no one would have expected.

## IF YOUR PROJECT HAS NOT CHANGED, BE AFRAID – VERY AFRAID

Throw out the risk register. An XPM project is so full of risk that the only effective countermeasure is to concentrate on ‘opportunities’. Focus on the opportunities that explore the unknown and that will give near-instant feedback



as to any of the myriad options that your project is exploring.

## A DAY IS A LONG TIME

The New Zealand government instituted a disaster compensation system within three days of the 2011 Christchurch earthquake.

THE FIRST STEP IN EACH CYCLE OF WORK (SAY, IN 24 HOURS) IS TO ESPOUSE A VISION OF SUCCESS FOR THAT DAY

The team responsible for the software used an XPM approach to visually track its work on a continual basis. Releases of working software were scheduled hourly. The system paid out more than NZ\$200m and ensured economic continuity in the face of a natural disaster.

## THE FIVE-STEP XPM LIFE CYCLE: VISIONATE, SPECULATE, INNOVATE, RE-EVALUATE AND DISSEMINATE

I am not sure that ‘visionate’ is in the *Oxford English Dictionary*, but the idea is that the first step in each cycle of work (say, in 24 hours)

is to espouse a vision of success for that day. The extreme project manager will draw upon the experts in the team to speculate as to possible ways to achieve that day’s vision. These speculations are then tested by the team’s action to innovate solutions. Many will fail. That isn’t a problem in XPM. In fact, if you do not fail often and frequently, your team is probably not trying hard enough. The learning comes through knowing what does not work, and from the occasional, often unexpected, breakthrough.

Finally, one must put a ‘time box’ on activity towards the end of the cycle to allow time to re-evaluate the work that day, and to disseminate the learning throughout the team and to stakeholders. ▀

*Further reading: Doug DeCarlo, eXtreme Project Management, Jossey-Bass, an imprint of Wiley (2004)*



**BRIAN WERNHAM** is a main APM board member and ‘hands on’ programme management consultant. His book, *Agile Project Management for Government*, is published by Maitland & Strong

# Ready to print?

**3D printing has begun to make bold marks on the construction industry.**

**MATT PACKER finds out where this building method is flourishing, and asks whether it is ready to replace bricks and mortar**

**Could the traditional brickie become a thing** of the past? If we take at face value the buzz around the construction industry's move towards 3D printing, then the answer would appear to be an emphatic 'yes'.

Regular readers of Project may have noticed the news story in the Winter 2016 issue mentioning the imminent construction of a 3D-printed laboratory in Dubai. But that is not the United Arab Emirates' first foray into this brave new world of building: it already boasts a 3D-printed office, made by Chinese firm Yingchuang Technology, which covers 250m<sup>2</sup> and stands 6m high. Opened in May 2016, the facility heralded Dubai's aim to become a global hub for 3D-printing technologies by 2030. That ambitious vision includes plans for numerous other structures built in the same revolutionary way.

Other such projects that are either completed or pending a green light include:

- **CHINA** Specialist 3D-printing construction firm WinSun has won copious coverage with its innovative builds, including two courtyards in Shandong Province inspired by the Classical Gardens of Suzhou, a UNESCO World Heritage site. Perhaps even more impressively, the firm has also built a set of 10 houses in Shanghai that, it claims, were printed in a single day. As well as costing less than \$5,000 to make, each house was partially made from recycled industrial waste.
- **US** 3D-printing firm Branch Technology has designated 2017 as the year it will print its eye-catching Urban Architecture Studio. The concept came from global design outfit WATG, which won a Branch Technology contest to design the world's first 3D-printable, 'freeform' house. In keeping with that artistic brief, the project aims to rethink traditional aesthetics and ergonomics from the ground up.

● **NETHERLANDS** In 2013, award-winning Dutch architect Janjaap Ruijssenaars announced plans to 3D print his 'endless house' concept: a novel structure based on a Möbius strip, a shape with no discernible beginning or end. In June 2016, Ruijssenaars' firm Universal Architecture finally unveiled the 2m-tall printer that will complete the task, designed by Italian 3D-printing technology guru Enrico Dini. Known as the D-Shape, it can print over areas measuring up to 6m<sup>2</sup>.

## LAYERS OF INNOVATION

So, how does construction-based 3D printing actually work?

"First, the building concept is developed in a computer-aided design program," says Konstantin Nefedev, spokesman for 3D-printing construction firm Apis Cor. "Then, using slicer software, it's translated into control code that directs the printer. Construction-based printers primarily use concrete mixes adapted for 3D printing. They have shorter setting

times, and can be sequentially layered to form the desired structure."

Nefedev explains that, while some construction printers typically create a building in modular parts that are later assembled, his firm's technology "utilises a mobile approach and can print houses as monolithic structures directly on site".

To give you an idea of what that machine looks like, imagine a small-scale crane fitted with a concrete-extruding nozzle, mounted on a pivot that elevates as layers are printed. Apis Cor's printer sits within the footprint of the structure it is working on. Other construction printers take a different angle, straddling and overhanging the printing site so the work is all done from outside the perimeter.

"3D printing will make affordable housing available to more people around the globe," says Nefedev. "It will also make custom architectural designs available to the general public and increase the overall quality, speed, efficiency and sustainability of construction. Costs and the amount of manual labour involved in the process will be reduced, and sites will be much safer and cleaner to work in. Plus, automated construction will help to reduce the possibility of human error."

## TOO MUCH TO LOSE?

All of this sounds great. But how long until it becomes industry standard?

Quite a while yet, according to Laurenz Kalthoff, business development chief at one of the construction sector's top market-intelligence firms, Building Radar.

"For 3D printing to really take off in the industry," he says, "equipment costs would have to decrease significantly. That's a major bottleneck. However, the biggest obstacle is the sector's tendency to sit back and wait until technology has been tested and proven to a satisfactory degree in other



"3D printing will make affordable housing available to more people around the globe. It will also make custom architectural designs available to the general public and increase the overall quality of construction"



One of 10 houses  
Shanghai-based  
WinSun constructed  
from 3D-printed parts  
in less than 24 hours

© WINSUN DECORATION DESIGN ENGINEERING CO.

The world's  
first functional  
3D-printed building  
is in Dubai



ALAMY

A 3D-printed house at Suzhou Industrial Park in Jiangsu Province, China



GETTY

industries. As such, 3D printing is unlikely to spur immediate, radical change throughout construction. Its growth will be slower, more incremental."

Here, we return to the issue of whether the industry's move towards 3D printing should be taken at face value. Kalthoff even goes so far as to say that there are "serious doubts" among experts over the capabilities of WinSun's technology, and that, because of the lack of proof that 3D printing works at scale, it is "not yet a viable means" of constructing habitable houses. In fact, he notes, many of the 3D-printing methods currently active in construction are in an "experimental state".

Only a handful of 3D-printed structures have been certified solid – such as the office in Dubai, which had to pass both UK and Chinese stability tests before it could welcome anyone in. So, is the message for project managers that this is very much a method in its infancy?

"Indeed it is: on one hand, because the technology has yet to be thoroughly developed, and, on the other, because the stakes in construction are so high that any delays or complications on any given site may trigger a lot of losses for different parties," says Kalthoff.

He elaborates: "Given the large investment volumes, long development cycles and tight deadlines in basically all

▶ "Given the large investment volumes, long development cycles and tight deadlines in basically all commercial construction projects, too many parties have too much to lose to adopt technology that has yet to prove itself"

commercial construction projects, too many parties have too much to lose to adopt technology that has yet to prove itself. That is why construction firms are hesitant to pick up something like 3D printing. Expect adventurous architects to lead the way, because of the opportunity to profile themselves as innovative pioneers.

"However," he adds, "I believe it's just a matter of time before we see the first habitable buildings created by 3D printers. Maybe three to five years – then another decade for the infrastructure to gain a foothold." □

MATT PACKER is a freelance writer and editor

## MATERIAL WORLDS

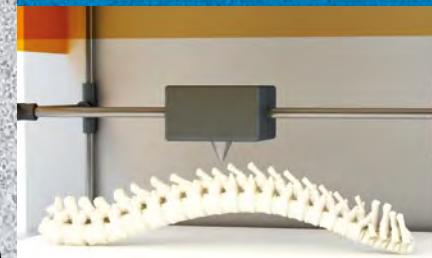
Five other areas where 3D printing has proven its versatility

### FOOD

Michelin-starred Barcelona dining venue Enoteca crafts an array of exotic dishes with a 3D printer, while US Italian restaurant chain Ribalta prints a delicious pizza. Taiwan hardware manufacturer XYZprinting has emerged as the Morphy Richards of this field.

### WOOD

Two firms are vying for supremacy in the race to popularise 3D-printed wood products: i.materialise, which uses powdered source materials, and 4 AXYS, whose printing devices slot small pieces of solid wood together in intricate layers.



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A 3D-printed human spine

### ORGANIC TISSUE

Researchers at Wake Forest Baptist Medical Center, North Carolina, have printed samples of human bone, ear and muscle matter and implanted them into animals. Regenerative treatments for injured soldiers are their next goal.

### CLOTHING

Dutch fashion designer Iris van Herpen has created catwalk styles and Björk stage costumes with shapes, volumes and textures that would be impossible to achieve with traditional tailoring. Print-to-order garments could happen.

### SOLAR TECH

Australian innovation hub the Victorian Organic Solar Cell Consortium has devised a way to print cheap, efficient solar panels onto rolls of flexible plastic, opening up a new avenue of energy resources for the developing world.



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# Game for knowledge

**Software and game theory have merged with education to create a host of innovative training tools. MATT PACKER explores the benefits of gamified e-learning and finds out where it could be heading**

For decades, finding hints of gameplay in everyday scenarios has formed a fertile branch of science. Some of history's biggest brains have propagated what we now call 'game theory', and each of their contributions has focused on a specific type of behaviour. For example, New Zealand scholar Charles E M Pearce studied queuing habits and road traffic, and John Forbes Nash (played by Russell Crowe in *A Beautiful Mind*) focused on our bargaining powers.

Game theory has been taken particularly seriously in the business world, where bosses and boffins have frequently collaborated to glean orderly patterns from the apparent chaos of fields such as marketing, sales and customer interactions, which gave CEOs a brainwave: 'Never mind studying this behaviour... why don't we just create it?'

In this way, the theory was turned on its head, spawning an array of 'gamified' business initiatives, such as Samsung Nation, the telecom giant's points-based system for driving visits to its website and boosting awareness of its products; and giffgaff, a UK phone network that employed a rewards scheme to encourage its customers to help out with key business

tasks, such as marketing. But, ultimately, how helpful are these platforms?

## THE SCIENTIFIC BASIS

Daniel Rowles is founder and CEO at Target Internet, an e-learning firm that runs online digital marketing courses.

"Gamification can be an especially valuable attribute within an e-learning programme," he explains, "because it provides the student with a steady, satisfying acknowledgement of their progress. E-learning done badly often leaves learners feeling rudderless and unsure if they're getting things right. But gamification can provide the reassurance that people crave in the form of familiar symbols of achievement, such as progress charts, badges and trophies."

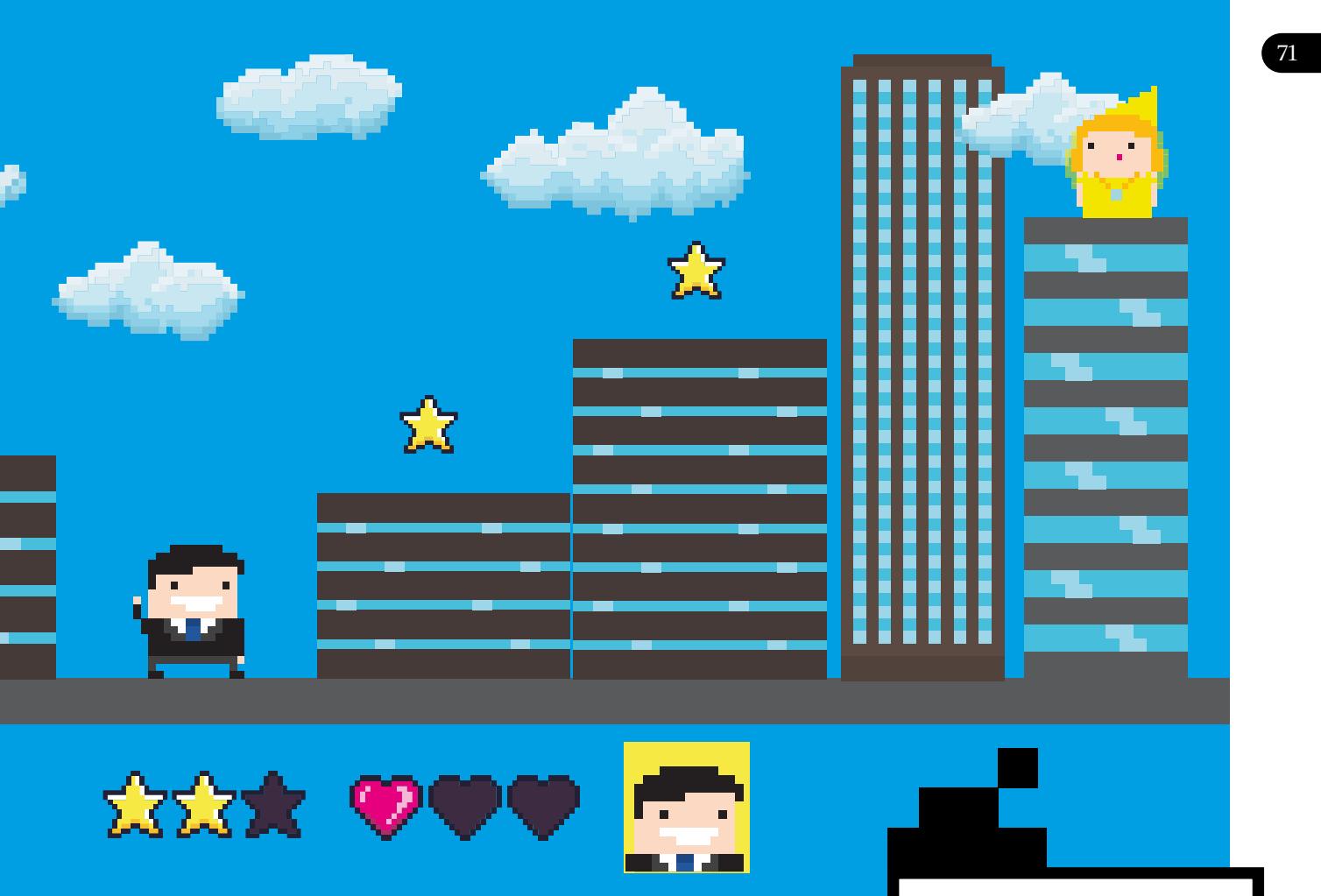
Now for the science bit: "Achievement symbols in gamified e-learning are also thought to release dopamine in the learner's brain," Rowles adds. "That's the same feel-good hormone that's activated by Facebook notifications."

So far, so cogent. But Suzee Laxton, founder of e-learning firm Flick and a project management adviser for start-ups, argues that restricting notions of gamification to badges, points and leader tables amounts

to a "fundamental misunderstanding" of what it is.

"There is a whole heap of learner-centric behaviours that gamification can tap into via different e-learning formats," she says. "For example, game-based assessments, business simulations or – through augmented reality (AR) – a whole different form of learning. Imagine taking the *Pokémon Go* phenomenon and applying it to a business induction, whereby new employees can explore their environment and reveal the information they need based on context. That will improve recall."

The implications for project managers are tantalising. Consider all the learning technologies that could be brought to bear on the preparations for an ambitious major project where different groups of staff in the managing organisation, and its partners, need to familiarise themselves with the venture's shape and logistics. Some may need to upskill to carry out the required tasks en route to completion. The potential for gamified simulations and assessments of the type that Laxton mentions is clearly vast.



However, the design of the chosen model must be accurately judged – for misunderstandings about gamified learning can also arise among prospective end users.

### MONOPOLY v UTILITY

Bristol software studio MyOxygen has built e-learning apps and mobile-focused business solutions for numerous high-profile clients, such as the Royal Navy and the Clarks shoe brand. Its head of user experience (UX) Brendan James Arnold says that, while gamification is firmly on the company's radar, he regards it with a healthy scepticism. The need for such caution became particularly pressing when a major healthcare provider asked the firm to create an e-learning app based on the look and feel of *Monopoly*. The idea was that the client would use the tool to train its staff in various stages of its procurement process – a hugely resource-heavy part of its work.

"The client had heard of gamification and that it could help engagement," says Arnold. "It sketched out a literal representation of a *Monopoly*-like board game where you start at 'Go' and complete the steps around the

board until you reach Go again. Essentially, it was a progress tracker that took the form of virtual pieces moving around a board."

Arnold advised against it: "A *Monopoly*-type board is visually complex and would have dominated the screen. Given that it was intended for mobile, there would have been a lot of wasted space. Also, moving a playing piece around a board is not, in itself, engaging. What makes *Monopoly* fun is the competitive element. In short, the app would have absorbed all the boring bits of *Monopoly* and ignored the fun bits."

In general, Arnold notes, the problem with organisations that are looking for custom-built e-learning solutions is that they tend to take gamification "too literally". That, he stresses, "typically leads to a complex, fiddly user interface (UI) that isn't focused on the task at hand".

Arnold's take on e-learning is utilitarian: "An attractive, well-polished, well-focused UI with good overall UX is almost always more important than achievement goals designed to keep you using an app."

That said, Laxton foresees a glittering future for gamified e-learning, thanks to

### GAME FOR MORE?

- ▶ Read a fascinating study of how *Pokémon Go* has gamified physical exercise at [bit.ly/pokemonstudy](http://bit.ly/pokemonstudy)
- ▶ Explore a whole planet's worth of gamified learning initiatives at [atgamificationworldmap.com](http://atgamificationworldmap.com)

technologies that will enable it to evolve out of the mobile space.

"The potential is limitless," she says. "E-learning has forever suffered criticism that it isn't as good as real-world classroom training. But AR will take it one step further – out of the classroom and back into daily life. Wearable tech such as HoloLens and Oculus Rift is just the first step towards embracing this. The end goal may be that AR becomes so commonplace that we can finally drop the 'e' from e-learning and just accept it as another form of learning." □

**MATT PACKER** is a freelance writer and editor

# THE HEART OF THE MATTER

**SUSANNAH LAWSON** looks at a technique used by businesses that teaches employees to harness the power of their hearts to help make better decisions

In an age when embracing the positive is encouraged, you may have spotted the trend whereby 'stress management' is evolving into the far more attractive-sounding 'resilience building'.

The corporate world is waking up to the need not only to reduce the mental and physical health risks associated with stress, but also to generate a more resilient workforce that can make smarter decisions and adapt faster to the pressures of our ever-changing world.

## OPTIMISING PERFORMANCE

Certainly, for Martyn Moutinho, head of people development at ITV, the rapid rate of change in the world of media and entertainment creates a big challenge.

"The skills we need to thrive in 2016 are not the same as those we'll need come 2020," he says. "For example, research carried out by the World Economic Forum suggests critical thinking, complex problem solving and creativity will become fundamental to how well people succeed in the future."

As a result, ITV's resourcing and development team has developed a leadership academy not only to build new skills, but also to help optimise personal performance and well-being for all senior ITV employees. Central to this is teaching a technique, developed by the HeartMath® Institute in California,

designed to reduce stress and facilitate smarter, more creative thinking.

"We focus on the heart/brain connection, and the role that different parts of the brain play in thinking and decision making," says Moutinho. "The great news is that, by practising simple, heart-centred breathing techniques, you can learn to positively influence the signals sent to your brain and ultimately make better decisions."

## FINDING THE RIGHT RHYTHM

Just as emotions influence the heart's rhythm pattern, the heart communicates with the brain and the rest of the body. This occurs via the nervous and hormonal systems, electromagnetic interactions and

other pathways. The HeartMath Institute's research has also demonstrated that the signals the heart sends to the brain can profoundly influence perception, emotions, behaviour, performance and health.

For example, when we feel happy, appreciative or at ease, this results in a 'coherent' heart rhythm that allows us to access higher-thinking functionality in our brains, helping us think more clearly and see more options or solutions to problems. However, when the heart rhythm pattern becomes incoherent – triggered by emotions such as anger, frustration or anxiety – this access is inhibited. As a result, we find it harder to think clearly or make good decisions.

## HEARTMATH QUICK COHERENCE® TECHNIQUE

**There are three simple steps to getting coherent**

**1. Heart focus:** focus your attention on your heart area, in the centre of your chest.

**2. Heart breathing:** now imagine your breath flowing in and out of that area. This helps your respiration and heart rhythm to synchronise. So, focus on this area and aim to breathe evenly. For example, inhale for five seconds and exhale for five seconds (choose a timescale that feels comfortable and flows easily).

Take a few minutes to get the hang of the heart focus and heart breathing stages, then introduce step three.

**3. Heart feeling:** as you breathe in and out of your heart area, recall a positive emotion and try to re-experience it. This could be remembering a time spent with someone you love, walking in your favourite spot, stroking a pet, picturing a tree or scenic location you admire, or even just appreciating that you are able to eat today or have shoes on your feet. If your mind wanders, bring it gently back to the positive experience.

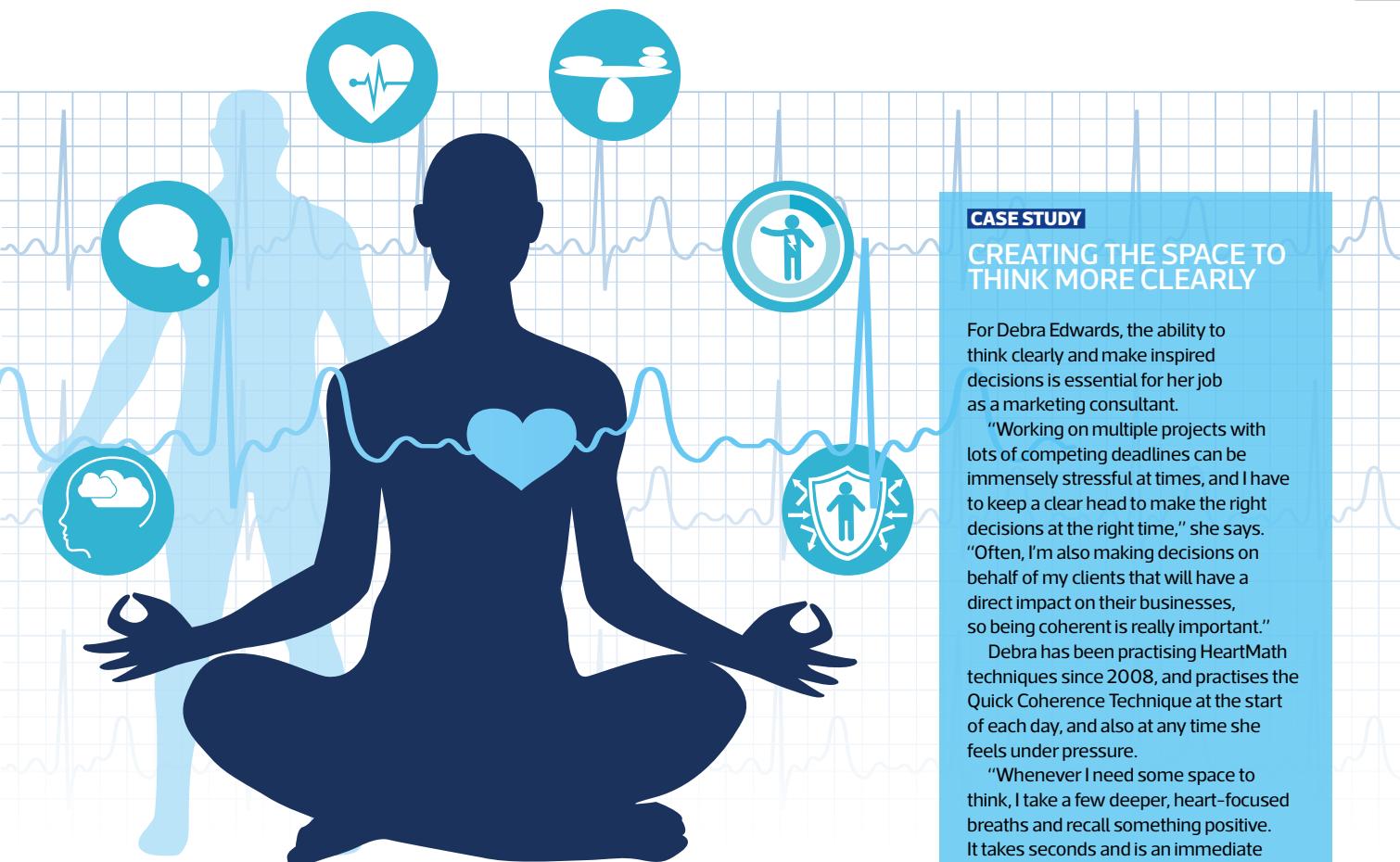
When practised daily for around five minutes, these three steps can help you de-stress, feel calmer and become more content. It really is that simple. Your heart rhythm pattern will become coherent and your heart-brain communication will optimise to help you think more clearly.

Once you've got the hang of this technique, you can use it any time you encounter a stressful event – for example, if you start to feel overloaded at work or sense you are about to face a difficult emotional situation. Just a few heart-focused breaths can help you stay calm and coherent instead of becoming stressed – that's why the technique is called the Quick Coherence Technique.

You can do it with your eyes open, as you walk, or as you talk, so you have a tool to counter stress in the moment. You can also measure your coherence levels with biofeedback technology via an app or handheld device.

● **For more information, visit [heartmath.org](http://heartmath.org)**

**"BY PRACTISING SIMPLE, HEART-CENTRED BREATHING TECHNIQUES, YOU CAN LEARN TO POSITIVELY INFLUENCE THE SIGNALS SENT TO YOUR BRAIN"**



Dealing with stress is a common occurrence in a profession such as project management, with its myriad of challenges to juggle – from dealing with issues in communication, resources and risk to managing scope changes, multiple stakeholders and staff without the right skills or experience. HeartMath's Quick Coherence® Technique (see box, left) is one method that can help provide a sense of calm and balance in times of stress.

Research has found that, practised regularly, these exercises can help control emotions and improve intuition, creativity and cognitive performance – as well as lowering blood pressure and other disease markers. In other words, it can help people become smarter and more resilient under pressure, which is one of the reasons why the techniques are popular among those in high-pressure roles, such as military, police, healthcare and professional sports roles.

## BUILDING RESILIENCE

Many large corporations, including Shell, BP, Unilever, Cisco and Boeing, are also using these methods to aid

staff performance and well-being. In one study carried out by the HeartMath Institute involving almost 1,400 corporate employees across five global companies, 41 per cent reported feeling tense, 35 per cent anxious and 38 per cent exhausted.

Yet, six weeks after learning HeartMath techniques, those numbers dropped to 15 per cent, 14 per cent and 20 per cent, respectively. In addition, whereas 63 per cent identified themselves as focused, and 65 per cent as perceptive, before the training, after six months of using the techniques, these ratings increased to 82 per cent and 85 per cent.

At ITV, the reaction to the training has been impressive.

"We are still gathering data, but the feedback has been very positive, and people are particularly impressed to see the difference learning these techniques can make," says Moutinho. "The training is creating more self-awareness and, I believe, equipping our people to genuinely think smarter and make better decisions in a world of ever-increasing complexity and change." □

### CASE STUDY

#### CREATING THE SPACE TO THINK MORE CLEARLY

For Debra Edwards, the ability to think clearly and make inspired decisions is essential for her job as a marketing consultant.

"Working on multiple projects with lots of competing deadlines can be immensely stressful at times, and I have to keep a clear head to make the right decisions at the right time," she says. "Often, I'm also making decisions on behalf of my clients that will have a direct impact on their businesses, so being coherent is really important."

Debra has been practising HeartMath techniques since 2008, and practises the Quick Coherence Technique at the start of each day, and also at any time she feels under pressure.

"Whenever I need some space to think, I take a few deeper, heart-focused breaths and recall something positive. It takes seconds and is an immediate recharge that gives me a fresh perspective and equips me to make better decisions," she says.

"It's also helpful when I'm facing a tricky situation and am unsure about the best solution. A few heart-focused breaths clears all the fuzziness and noise away, and a solution often comes. It's a great technique to keep you moving forward when you're feeling stuck."

Another useful application of the Quick Coherence Technique is to dispel an emotional reaction – for example, as a result of a conflict with clients or colleagues.

"If you can stay coherent, you can avoid getting bogged down in the emotion of a situation and can instead respond more appropriately," explains Debra.

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**SUSANNAH LAWSON**  
is a HeartMath practitioner and co-author, with Patrick Holford, of *The Stress Cure*

# FIRST IMPRESSIONS

Effective communication skills are an integral component of any project manager's toolkit, ensuring complex projects happen on time and to specification. **MICHAEL MAYNARD** offers his insight into some key areas to build on

**First impressions count.** The moments that people see you for the first time (the first seven seconds, to be precise) are when they assess your outward appearance, stature, gestures and communications skills, and form an opinion based on what they see.

We live in a world where this fact is particularly pertinent, where social media and online influence feature highly, and where everyone is heavily reliant on the judgements people make on all aspects of our communication.

However, as important as digital media may be, there really is no replacement for face-to-face meetings and presentations. Somehow, looking your client, supplier or colleague in the eye and explaining directly what it is you need, are offering or are trying to understand has the strongest impact of any medium of communication. Good communicators can effect change with their words. Just look at some of the great orators throughout history; their words have inspired action – sometimes quite dramatic action – from large groups.

Great leaders, including top-rate project managers, are those able to inspire others. To do this, their communication must be bold, not bland. The success of projects and business as a whole depends on communication, and leaders spend more time each day communicating than performing any other activity. The higher up the organisation they are, the truer this becomes. Yet research conducted by BT reveals that many conversations are often unsatisfactory, highly charged or completely misunderstood.

## EMOTION MATTERS

The best communicators are able to win hearts, as well as minds. They do this by drawing on real, often personal examples

when speaking, and introducing emotion to the situation. Painting a picture of how any change can affect customers' feelings brings the impact of the issue to life. In effect, it brings some empathy and perspective.

One example of this is a project manager at BMW who illustrated the importance of a specific element of the 'small print' in an insurance document by telling the story of an accident that happened and its affect on the people involved. This helped bring home the human side of the scenario to those listening. She went on to describe an alternative approach and encouraged her people to pay attention to the detail of their policies.

Communication should always inspire. Rather than feeling dictated to, people want to feel they are empowered to do the best they can and make a difference. It's a challenge for all managers, especially those whose focus is so clearly on delivering tasks efficiently. Yet people perform at their best when their leaders create a culture that is exciting and enjoyable. These requirements compel managers to consider the emotional

**COMMUNICATION SHOULD ALWAYS INSPIRE. RATHER THAN FEELING DICTATED TO, PEOPLE WANT TO FEEL THEY ARE EMPOWERED TO DO THE BEST THEY CAN**



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atmosphere they create through their communication and presentation.

If you aren't inspired by your leader – if you look at them and see nothing you aspire to – it is more difficult to be led or instructed by them. The best leaders and communicators create a lasting impression through their words and actions.

## ESTABLISHING A PRESENCE

Charisma plays a key role in successful communication, and the leaders with the most favourable impact manage to convey a mixture of both confidence and vulnerability. Confidence inspires trust in proposed ideas or actions (no one is going to feel inspired by someone staring at their shoes and emanating an air of defeat), and showing a more human and vulnerable side reveals approachability and humanity.

When briefing a supplier, or pitching an idea to a colleague, show that you are focused on getting the job done by also being open to any questions and suggestions from them. You can



acknowledge enough fallibility, both in yourself and others, to listen and take on board outside input.

Over the past five years, we have coached hundreds of project managers at a German consulting firm to improve their communication skills. The feedback they receive on their individual impact, and the opportunity to learn and rehearse new behaviours, instils a sense of confidence and intensifies their ability to be present at all times.

This also allows managers the agility to change direction when needed. Rather than being rigid in the face of change, or racked with decisional regret over a course of action that hasn't quite worked out, they see what's needed and have the confidence to change course. This can have a positive impact on those you are working with or managing.

## BUILDING RELATIONSHIPS

You can't lead on your own. Leadership is about relationships – and any effective project manager has a lot of those to build and manage through each venture. When

communicating, it is essential to keep your focus on the other person or people. You need to ask yourself: 'What are they thinking? How are they feeling?' This helps maintain your relationships with others, rather than just spouting off what you think and listening to the sound of your own voice.

Building rapport and using personal chemistry are crucial, and, again, involve empathy: trying to understand where those you are dealing with are coming from emotionally, and communicating with them while bearing that in mind.

These rules also apply when the communication takes the form of a pitch or presentation. Coaching project managers at a software company highlighted how important it is to adapt to the audience at hand and demonstrate personality, empathy and emotional agility. By focusing on the audience during a presentation, a manager changed the emphasis of some data to make a point more relevant to those listening.

All forms of communication are more effective if they react and adapt

throughout the process. For example, rather than just talking at a client when debriefing them on the process and outcomes for a certain project, home in on certain questions and areas of interest to elaborate on them.

## COMMUNICATING WITH IMPACT

Whatever the industry sector or organisational area you work in, effective communication is an essential quality for any successful project manager. When assessing your own interpersonal skills, try the following five 'Ps' of powerful communication:

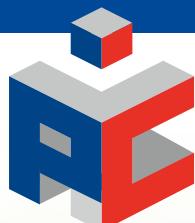
- 1 Preparation:** make sure you research your audience, gear your message to their needs and rehearse your delivery.
- 2 Purpose:** clarify what you want to achieve with your communication. What is the impact you want to have?
- 3 Presence:** be alert and aware throughout your delivery so that you can build relationships and adapt according to your audience.
- 4 Passion:** speak from the heart and with conviction. What you say should be important, to you and them.
- 5 Personality:** be yourself. Use your own individual style.

Adhering to these will ensure any presentation goes off with a bang. It goes without saying, but failing to prepare is preparing to fail, and, while no one wants to hear something recited or over-rehearsed, knowing the nuts and bolts of what you want to talk about is crucial. If your communication is peppered with enthusiasm and confidence, it will convey authentic power and gravitas, and provoke action, getting results. ▀



**MICHAEL MAYNARD** is co-founder of **Maynard Leigh Associates**

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# FROM THE BOTTOM UP

Bechtel's **DARREN COLEMAN** reflects on a career delivering some of the UK's biggest railway infrastructure projects

**Leaving school, I had no idea what I wanted** to do as a career. However, my father and grandfather both worked in the rail industry, and, fortunately, my father persuaded me to take an apprenticeship with British Rail.

The birth of my son in 1995 started my drive to provide for my family. I gained my civil engineering degree in 1999 at the age of 27 and began my career in project management delivering railway infrastructure projects. The jobs have got progressively bigger.

I've worked on a number of successful projects, including the delivery of the Manchester Victoria station redevelopment programme, Proof House North and South Junction renewal, the West Coast A09 line-speed improvements and Crossrail On-Network Works.

## CAREER HIGHLIGHTS

While there have been many highlights, if pressed for just one, it would be the delivery of the West Coast A09 project, which opened my eyes to the complexity of working on operational railway projects.

These line-speed improvements were critical to the West Coast programme. There was a very tight delivery schedule

## I'VE BEEN FORTUNATE TO HAVE WORKED WITH A NUMBER OF STRONG LEADERS, INCLUDING PROJECT MANAGERS

that, if not met, could have resulted in a major impact on the train timetable.

The A09 project spanned London to the Scottish border and was managed in Manchester. During the five-year programme, we delivered all of the line-speed upgrades on time. The commitment and camaraderie of the project team and supply chain were truly phenomenal.

Now, I'm the project director responsible for the £1.3bn Crossrail On-Network

Works programme. The work includes overground infrastructure changes needed to accommodate the new electric-train services starting in May 2017 between London Paddington and Reading, as well as the new Crossrail services between Paddington and Reading, and Paddington and Heathrow Airport, both starting in May 2018.

Key works include the new platform layout at Paddington Station, a new train-depot access at Old Oak Common, Acton dive-under (an open-topped rail tunnel for separate freight and passenger operations at Acton Yard), and the Stockley flyover (rail infrastructure on a viaduct providing a flyover facility for services from Stockley to Heathrow Airport). In addition, we are working on new overhead line infrastructure from Hayes & Harlington to Maidenhead, a new train depot at Maidenhead and alterations to 13 stations.

## LESSONS LEARNED

My role now allows me to do a bit of everything – safety, engineering, project management, commercial and project controls, and client and stakeholder management. Most of all, it allows me to work with a wide range of people from different cultures and backgrounds who are at differing stages of their careers. I want to continue to learn, be challenged and deliver change – but, most of all, I enjoy helping people to develop and realise their goals.

Joining Bechtel has had the greatest influence on my career and life. In 2006, when I joined the company as the area construction manager for the West Coast A09 project, Bechtel gave me the opportunity to work in a number of different disciplines and roles, each offering me a progressive learning opportunity.

Working there has also had a positive influence on my family. We have travelled, met a variety of people from different



**DARREN COLEMAN** is project director at Bechtel for Crossrail On-Network Works

cultures and attended events that we would never have made the invite list for, had I not joined the company.

In terms of lessons learned, I would say the most important one is listening to and considering the other person's perspective before answering. Also, do not underestimate the power of and need for leadership skills. Building teams requires significant time with – and an understanding of – those around you, including yourself.

Throughout my career, the support of my family, particularly my wife and son, has been a huge contributing factor. The people around me have also been important. I hate being called 'lucky' in my career, but I've been fortunate to have worked with a number of strong leaders, including project managers, who have shared their experience. It's definitely the need to deal with the next challenge that gets me out of bed in the morning. ▀



Do you have an interesting career story that you would like to share with readers of Project? Email [editor@project-journal.co.uk](mailto:editor@project-journal.co.uk)

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# CAREER CLINIC

## Your project management office needs you

### The annual Wellington and APM Project

Management Office Specific Interest Group State of Project Management survey shows that approximately 85 per cent of project organisations have a project management office (PMO) of one type or another. This is good news, but often project managers are not advocates, a common complaint being: 'They just keep hassling me, asking for project reports!' The same survey also showed that more than 55 per cent of respondents were 'very' or 'somewhat' dissatisfied with the current level of project management maturity in their organisation.

You cannot have it both ways. Project managers cannot be mavericks. Every organisation should define a simple, practical project management methodology, championed and owned by the PMO. When a new project manager joins the organisation, they should be thoroughly 'sheep dipped' in this agreed

scalable approach. We don't want every project manager running off and doing their own thing. It might be in your interest as a project manager, but it's certainly not in the interest of the wider organisation. Consistent reporting on a timely basis is not unreasonable. As a project manager, you have to accept that you do need to feed the machine with this information.

What should be driving maturity? What should be driving consistency in methodology and continuous improvement? The PMO. We should all be advocates of the PMO. Of course, yours may not be perfect. I'm sure it could be improved, but you have to get behind it, not stand in the way complaining. The PMO is the best way of championing project management standards, methods, training, tools and the development of a community of practitioners.

PMOs benefit from having depth in project management capability. Consider

this as a career route. Come away from day-to-day projects and set standards for your organisation as part of a PMO centre of excellence. Running a project is a challenge. Driving maturity in project management for a department or organisation is also quite a challenge. Time to embrace. Your PMO needs you. □



**VINCE HINES** is managing director of Wellington Project Management, working with APM to offer career advice

# Appointments

### New senior appointments for Murphy



Paul Bourke has been appointed as head of highways and streetworks at Murphy. Bourke is ideally placed to take on this role because of his broad experience in managing multidisciplinary teams on complex projects, including Deephams Sewage Treatment Works in north London.

Meanwhile, Mark Singleton joins as group head of planning and project controls from Balfour Beatty Construction Services UK. Based in Kentish Town, Singleton will be responsible for leading planning and project controls across the group. He brings with him 28 years' experience with major infrastructure contractors.

### New managing director appointed for Urban Union



Growing specialist company Urban Union, a joint venture between Robertson Group and McTaggart Construction that delivers regeneration developments in Scotland, has appointed Neil McKay as its managing director.

Mckay has 30 years' construction industry experience and is a Chartered quantity surveyor with expertise in developing major building and civil engineering projects. He also has experience of overseeing the contractual and commercial requirements of projects, and partnering consortium arrangements.

### New highways programme director at Mott MacDonald



Mott MacDonald has appointed Brian Gash as a programme director in its highways business in the UK. He will be responsible for coordinating and increasing engagement with Highways England, aligning a joint approach on a number of key aspects including safety and project delivery.

A registered project professional, Gash has worked in the construction industry for more than 30 years. He joins from Highways England, where he was group leader and the senior responsible owner for Major Projects South West, overseeing the delivery and governance of six major infrastructure schemes.

### New director for Deloitte Real Estate



Deloitte Real Estate has hired Claire Handby as director at its Manchester office. She is a specialist in programme and project management, joining the firm with 18 years' experience in real estate, infrastructure, construction and management consulting.

Having worked for professional services giant EY, she has consulted on large projects such as London 2012. In her new role, she will help drive growth by enhancing the firm's performance improvement offer with private and public sector clients.

# Bookshelf

Which books should be top of your reading list this spring? *Project* readers find out



## MEET THE PANEL



Graham Winch  
is professor of project management at Alliance Manchester Business School



Helen Vaughan-Evans  
is project manager for the Northway and Marston Flood Scheme at Oxford City Council



Tom Worsnop  
works in project management at Arup, specialising in infrastructure projects



Mike Rowley  
has 45 years' industry experience with Rolls-Royce and Babcock International Group



Sarah Notton  
is the editor of *Project*

**IF YOU WOULD LIKE TO REVIEW A BOOK FOR *PROJECT*, PLEASE CONTACT EDITOR SARAH NOTTON AT [editor@project-journal.co.uk](mailto:editor@project-journal.co.uk)**

## CAPITAL PROJECTS

**Author:** Paul Barshop

**ISBN:** 978-1119119210

**Price:** £32.99

**Publisher:** Wiley



## "PRESENTS THE DATA BEHIND THE ANALYSIS WITH A LIGHT TOUCH"

*Capital Projects* is aimed at project sponsors in owner/investor organisations. Drawing on Independent Project Analysis' (IPA's) benchmarking database (Barshop is a director at IPA), the book specifies the project sponsor's role as the owner of the business case for the project. It covers in brisk style the role's various aspects, including the relationship with the project manager and the team, managing the stage-gate process, chairing the project steering committee, and the profound importance of effective front-end definition.

The book is different from the previous IPA publication by Ed Merrow, which deployed large amounts of IPA data. This presents the data behind the analysis with a light but effective touch, focusing more on 'how to' rather than 'why'. The two books complement each other well.

The project sponsor's role has, arguably, not been given enough attention to date. Yet no project manager can be effective if the project sponsor does not own the business case so as to articulate the key trade-off decisions about the business risks of the investment in partnership with the project manager who owns the delivery risks of the project. Project sponsors are typically not project professionals, but they are equally important to the effective management of projects. We need to develop a deeper understanding of the competences they require to consummately perform their role, and this book is a good place to start.

Reviewed by Professor Graham Winch

## RESULTS

**Author:** Jamie Smart

**ISBN:** 978-0857087096

**Price:** £10.99

**Publisher:** Capstone



## "SMART HAS A LOT TO SAY AND HIS KEENNESS TO TELL US COMES THROUGH"

In *Results*, Jamie Smart promises to wake up your innate ability to create results in a world of increasing volatility, uncertainty, complexity and ambiguity by tackling the beliefs, concepts and misunderstandings ('contaminated thinking') that place artificial limits on the results we produce.

The book builds on Smart's work in the field of psychology on the concept of clarity, and he returns regularly throughout the book's three parts to the golden formula: clarity = capacity – contaminated thinking; clarity + action = results.

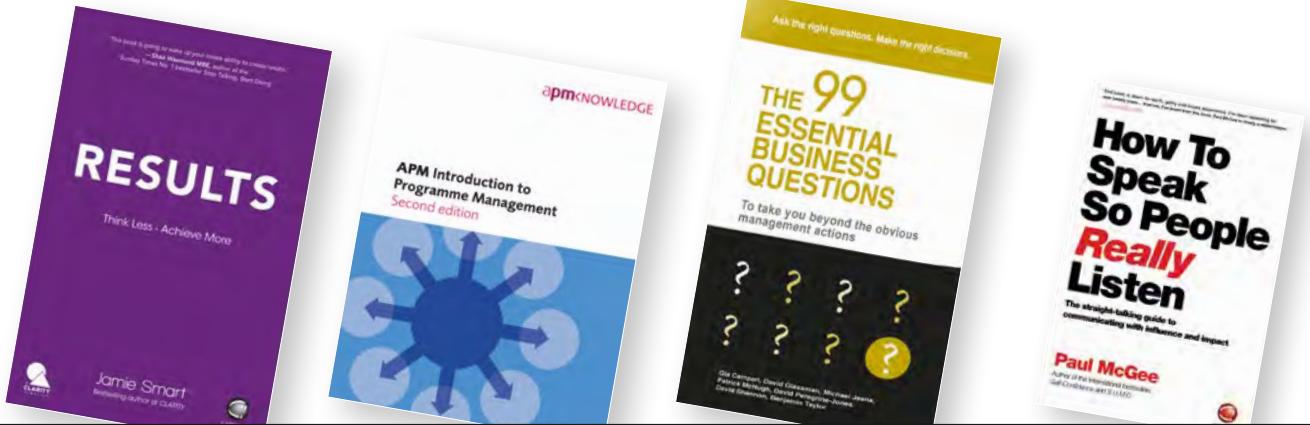
Smart invites us to test his ideas in our own lives, to discover the truth for ourselves through practicality checks and experiments. In this regard, the book acts like a coaching session. He tells stories about what this way of thinking has achieved for his clients, which brings the science down to earth.

Smart has a lot to say, and his keenness to tell us comes through in his writing, which could, for some readers, come across as a hard sell.

He provides the reader with a set of techniques to clear the mind; tap into our innate capacity for clarity, wisdom and insight; avoid misunderstanding; and generate understanding in oneself and others. These are all crucial skills for project professionals.

*Results* is empowering. I recommend it to anyone needing a little help to discover the result creator who has been right there within you your whole life.

Reviewed by Helen Vaughan-Evans



## APM INTRODUCTION TO PROGRAMME MANAGEMENT

**Author:** APM  
**ISBN:** 978-1903494585

**Price:** £25  
**Publisher:** APM



## "A COMPREHENSIVE INTRODUCTION"

This is the second edition of *APM Introduction to Programme Management*, first published nearly a decade ago. It is an easy read for executives, those relatively new to programme management, and those in the community who should and need to know how project management skills are one aspect of the bigger picture.

The book is concise, arranged over three sections and totalling 55 pages. It demonstrates links to other *APM Book of Knowledge* chapters, and there is a full glossary of terms. The book does not focus on the 'technical' aspects of programmes, nor is it aimed at one specific industry. Rather, it iterates that programme management is not simply another level of project management, and explores the organisational and strategic contexts in which programmes exist. Complex discussions are supported by clear and easy-to-understand illustrations.

Although the book is based on the before, during and after stages of a programme life cycle, the topics discussed in the three sections are not easily linked to the life cycle. For example, information and benefits management is not discussed until the final pages of the book, whereas, in reality, these are key considerations in the formation of a programme.

This is a comprehensive introduction and offers helpful references for those keen to explore particular subject areas. *APM Introduction to Programme Management* does exactly what the title suggests.

Reviewed by Tom Worsnop

## THE 99 ESSENTIAL BUSINESS QUESTIONS

**Authors:** David Shannon et al  
**ISBN:** 978-1910819890

**Price:** £15  
**Publisher:** Filament Publishing



## "A WORKBOOK RATHER THAN A TEXTBOOK"

Unusually for a management strategy book, the authors of this book offer no answers, but instead strive to present a clear digest and analysis of systematic alternative questioning to support the scrutiny of common business situations. Written as a workbook and journal rather than as a textbook, it has a well-organised, easily navigable structure, with plenty of space left for notes.

Starting with the questions that should be asked in any business situation, the book goes on to summarise the remaining questions into four business scenario groups: external; internal; team related; and personal.

The book then illustrates 47 business situations, and, with each of them, proposes specific questions to explore these challenges. The remainder of the book assesses the 99 questions, so you will understand why you should ask them and what insights you might expect to gain.

This book succeeds in its intent to equip the reader with a set of searching questions to stimulate and assist in discussions, as well as to advance thought processes to get to the crux of business problems. You may look in the book for a situation similar to the one you face, but you will later realise that the book's questions often reveal further questions.

Although aimed at business leaders and managers, it could be helpful to project practitioners, as it covers a number of scenarios that arise during typical project life cycles and within project teams.

Reviewed by Mike Rowley

## HOW TO SPEAK SO PEOPLE REALLY LISTEN

**Author:** Paul McGee  
**ISBN:** 978-0857087201

**Price:** £10.99  
**Publisher:** Capstone



## "AUTHOR'S STYLE MAKES THIS A VERY EASY READ"

The author, communication coach and international speaker Paul McGee, is evangelical about the importance of effective communication for a successful career: "That's the reality, folks; master your communication skills and it will help get you noticed, get along better with others and get ahead in life. Fact." For him, excellent communication skills can make the difference in getting a job, winning a piece of business or influencing senior management.

In this book, McGee has put together a practical toolkit of actions and ideas for realising your own potential through the spoken word. He breaks his advice down into three sections: seven great sins of speaking; eight ways to speak so people really listen; and "I'm glad you asked that...", in which he tackles issues about nerves, humour and body language.

Each point is illustrated with anecdotes told in his humorous style, and he uses effective 'pauses for thought' for readers to examine their own behaviours. McGee sums up at the end of each chapter with a concise takeaway, such as "Know your audience, not just your message".

The author's accessible and straightforward style makes this a very easy read, and he offers up numerous useful nuggets. While most tips are common sense, this is a useful guide to 'reinforce, remind and reveal' strategies so you can examine your own presentation methods and make improvements to achieve results.

Reviewed by Sarah Notton



# Trust me, I'm a project manager

In these uncertain, disrupted times, customers hunt out trusted brands more than ever. **EDDIE OBENG** challenges project managers to build their brand as the profession gains Chartered status



**PROFESSOR  
EDDIE OBENG** is an educator, TED speaker and author of nine books, including *Perfect Projects*, published by Pentacle Works, and *All Change! The Project Leader's Secret Handbook*, published by the Financial Times. Reach Eddie on Twitter @EddieObeng or read his blog: [imagineafish.com](http://imagineafish.com)

**According to Oxford Dictionaries, the world has now** entered the 'post-truth' era. This would appear to be a significant change. But we project managers smile slyly at the discovery the world has only recently made, but which we have known about for ages.

Consider the projects whose red/amber/green reports are full-on green right up to the point when the project crashes and burns, over budget, late and without deliverables. Or the wonderful way a phase can suddenly become a month late, overnight. Or how sponsors can confidently announce delivery dates without understanding the complexities. Or how organisations new to agile can have scrum after scrum and yet produce an untestable final product that can't go to the full market.

Many of these come from 'invisible'-type projects: those where progress is not obvious or easily measurable. Projects in this category include software coding, culture change, innovation, marketing and artistic endeavours. In these projects, asking the team, 'How is it going?' elicits a one-word answer: 'Fine'. They may not intend to speak 'post-truths'. It is more likely that, because of the invisible nature of the project, they themselves don't know they are off track.

As the world moved away from being about purely local transactions and people began to rely on 'strangers' to provide their food and medicine, it became a matter of life or death to know the truth behind what you were consuming and buying. As a result, branding was born and thrived. First, with bits of hot metal on calves, and then on labels on bottles of medicine, so you wouldn't get taken in by fake 'snake oil' salesmen, but could be sure that you had the genuine article.

Brands have now taken on a life and value of their own. Certain brands we automatically associate with a range of specific qualities that reassure us. In a complex situation where you have little time to decide and you are unsure of the outcome, a brand works as a shortcut proxy for the truth.

In fact, the more uncertain and ambiguous the situation, the more likely people are to reach for brands they recognise or understand.

For many enterprises, the importance of their brand is significant enough for it to be reported in their financial results. Brands are also really significant for individuals. Just mentioning certain names conjures up a distinctive list of adjectives that you can be certain that person will embody. Think Branson, Trump or Madonna. You know exactly what to expect.

According to the World Economic Forum, the types of risk affecting the world are more diverse and ever-more interconnected. In such a world, who would you look to, except project managers, to guide you through?

But wait. What is our branding like? What is the list of qualities or adjectives that immediately spring to mind? And for you, as an individual, when you're at a dinner party and you mention that you are a project or programme manager, what words and phrases come automatically into people's heads? Do these words represent what you want others to think of you?

APM will be able to help you with your branding. You will be able to tweak your brand so it says, 'Oh, and by the way, I am a competent professional who you can trust your project success to.' Taking on your Chartered status will, APM hopes, give you much more power as a project manager.

But, as with everything, there is a downside, and this one is huge. With great power comes great responsibility. At this moment, 'Chartered project manager' doesn't really have fully formed brand values and attributes. What you do will shape the world's perception of the brand.

Indeed, perhaps soon Oxford Dictionaries' expression of the year will be 'Chartered project manager', and it will be describing the big change your project leadership has brought to a world in chaos. ▀

# Project Management at Manchester

CPD/PGCert/PGDip/MSc

**The School of Mechanical, Aerospace and Civil Engineering at The University of Manchester is a global leader in the delivery of project management education. With over 50 years experience in the postgraduate education of project managers, we continue to enhance our delivery, which in turn shapes future practice.**

## **MSc Project Management Professional Development Programme (Blended Learning)**

**Accredited by APM and GAC-PMI**

Our flagship programme, which is supported by organisations such as Rolls-Royce, AMEC Foster Wheeler, Sellafield, E.ON and UTC Aerospace Systems (UTAS), has graduated over 450 students since 2003. In addition to the UK programme, we also deliver in Singapore with our strategic partner, Nanyang Technological University (NTU).

Rather than simply acquiring knowledge and theory on topics such as Project Cost Management, Commercial and Procurement, and Planning and Resource Management, the course focuses on the practical aspects of managing projects in a 'real-world' environment. This facilitates the development of critical thinking and reflective practice, which adds value to students and their companies.

The programme's blended learning approach combines face-to-face teaching with web-enabled technology through our virtual learning environment. Students attend two-day plenaries every six months and a one-day mid-term event, supported by online tutorials and off line engagement. This provides significant networking opportunities across public and private sectors.

Students build their course of study by registering for modules individually. Study can be for CPD, Postgraduate Certificate, Diploma and/or MSc. Students have typically been sponsored by industry; however, we now accept applications from suitably qualified and experienced individuals.

Project Management is part of a suite of professional development programmes that we offer at Manchester.



For further information, please contact Sue Hubbard:  
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