

**CONSTRUCTION
UNDER THE WEATHER**

Contingency planning for bad conditions and other delay factors

**THE WORLD'S
MOST SECURE COIN**

How the Royal Mint beat counterfeiters with the £1 piece

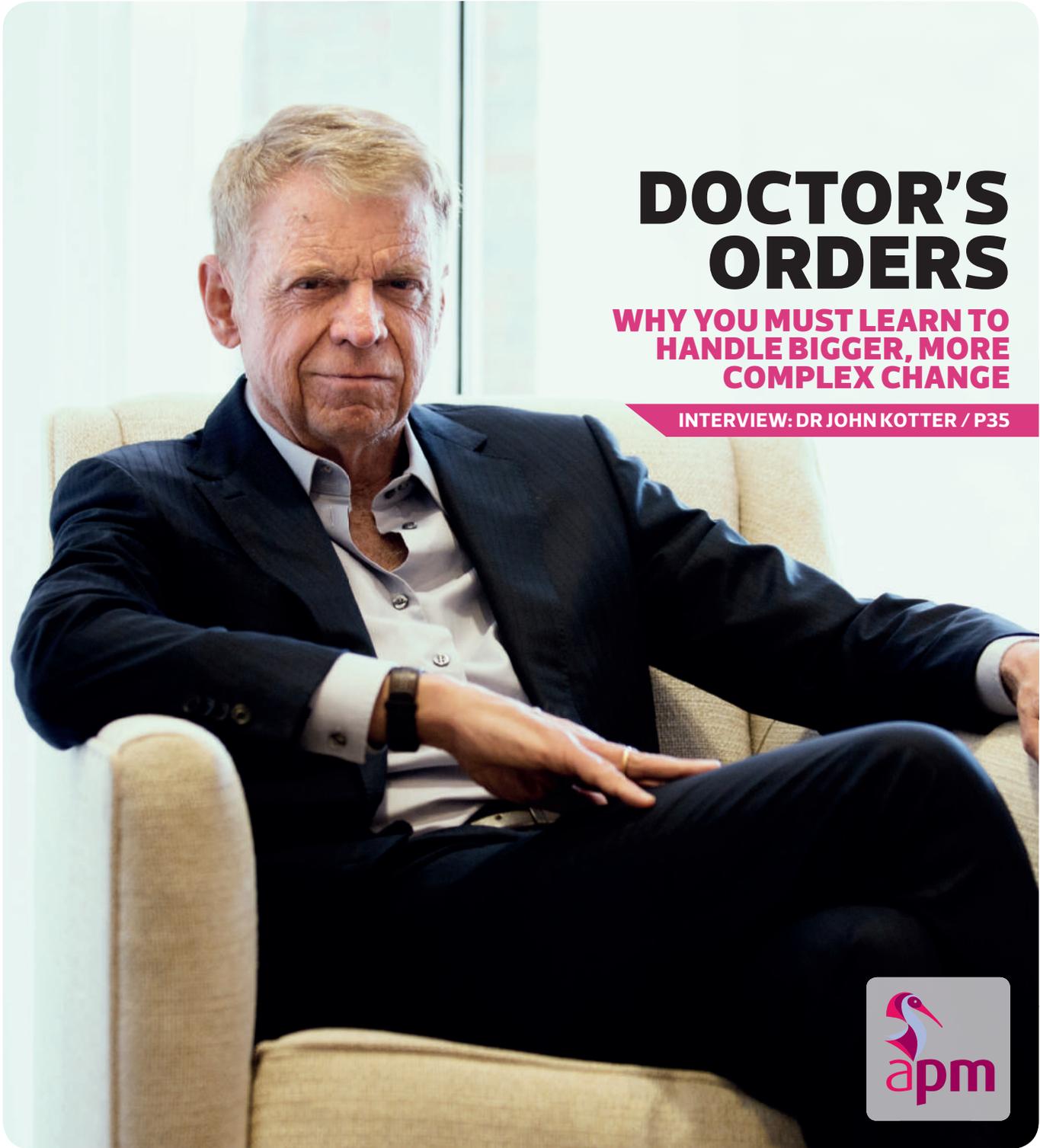
**SPECIAL REPORT:
CHANGE MANAGEMENT**

What the future of organisational transformation has in store

PROJECT

Autumn 2017
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the voice of the project management community



DOCTOR'S ORDERS

**WHY YOU MUST LEARN TO
HANDLE BIGGER, MORE
COMPLEX CHANGE**

INTERVIEW: DR JOHN KOTTER / P35



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Welcome

As APM continues its work towards establishing a new Chartered standard and a Register of Chartered Project Professionals, it is also important to look at ways of encouraging a new generation who choose project management as a first-choice profession. The 'trailblazer' employer group led by Sellafield has worked with APM to develop apprenticeship standards, and is offering young project managers wide-ranging opportunities to build their skills with on-the-job training and assessment. On page 24, we talk to a number of employers and apprentices about the benefits of the apprenticeship route.

In this issue, we are focusing on various aspects of change management. We're delighted to have secured an interview with the change management guru himself, Dr John Kotter, who offers his insights and strategies on how we can best equip ourselves to deliver change in a fast-moving world (page 35). Turn to page 45 for our special report, while APM's Enabling Change Specific Interest Group outlines its research identifying the key factors to successful change on page 22.

As part of our continuing series to show how project management affects our everyday lives, we talk to the Royal Mint about the development and roll-out of the new £1 piece, the world's most secure coin (page 38). Unexpected weather events – an increasingly frequent phenomenon – can also significantly impact a construction project's schedule. On page 30, we look at some of the options available to help project managers mitigate against such delays.

Finally, this is my last issue of *Project*, as I am relocating to Canada. It has been a great experience working with APM and getting to know its membership at this exciting time for the profession. The journal will now pass to the highly capable hands of editor Ben Hargreaves and consultant editor Richard Young, who bring with them a wealth of experience in business and membership publications.

Enjoy the issue. As always, please do send in your comments and suggestions to editor@project-journal.co.uk



THE 'TRAILBLAZER' EMPLOYER GROUP IS OFFERING YOUNG PROJECT MANAGERS WIDE-RANGING OPPORTUNITIES TO BUILD THEIR SKILLS WITH ON-THE-JOB TRAINING



SARAH NOTTON is the editor of *Project*
editor@project-journal.co.uk

PROJECT

Editor: Sarah Notton
editor@project-journal.co.uk
Senior designer: Sophia Haines
Designer: Alix Thomazi
Senior sub-editor: Mike Hine
Advertising manager: Aisling Hilsdon
020 3771 7257
aisling.hilsdon@thinkpublishing.co.uk
Group advertising manager: Tom Fountain
Account director: Kieran Paul
Managing director: Polly Arnold

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APM, Ibis House, Regent Park, Summerleys Road, Princes Risborough, Buckinghamshire HP27 9LE, United Kingdom.
Tel (UK): 0845 458 1944 Tel (Int): +44 1844 271 640 apm.org.uk

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“FOR THE FIRST TIME, A COIN OFFERS A BANKNOTE-LEVEL SECURITY FEATURE”

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RISING STAR PHOTO: WILL AMLLOT

KICK-OFF



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HS2 CONTRACTS AWARDED

The government has announced the winners of contracts to build the first phase of HS2 between London and Birmingham. Among those listed are UK firms Carillion, Costain and Balfour Beatty. The contracts, covering design and construction preparation works, are estimated to be worth £6.6bn and are expected to support 16,000 jobs. They have been split into three regional groups and have been awarded to the following joint ventures:

Area South

• S1: Euston tunnels and approaches – SCS JV (Skanska Construction UK Ltd, Costain Ltd, STRABAG AG)

• S2: Northolt tunnels – SCS JV (Skanska Construction UK Ltd, Costain Ltd, STRABAG AG)

Area Central

• C1: Chiltern tunnels and Colne Valley viaduct – Align JV (Bouygues Travaux Publics, VolkerFitzpatrick, Sir Robert McAlpine)

• C2: north portal Chiltern tunnels to Brackley – CEK JV (Carillion Construction Ltd, Eiffage Genie Civil SA, Kier Infrastructure and Overseas Ltd)

• C3: Brackley to south portal of Long Itchington Wood Green tunnel – CEK JV (Carillion

Construction Ltd, Eiffage Genie Civil SA, Kier Infrastructure and Overseas Ltd)

Area North

• N1: Long Itchington Wood Green tunnel to Delta Junction and Birmingham spur – BBV JV (Balfour Beatty Group Ltd, VINCI Construction Grands Projets, VINCI Construction UK Ltd, VINCI Construction Terrassement)

• N2: Delta Junction to WCML tie-in – BBV JV (Balfour Beatty Group Ltd, VINCI Construction Grands Projets, VINCI Construction UK Ltd, VINCI Construction Terrassement)

HS2 IN NUMBERS

£55.7bn
the latest revised budget to build the high-speed railway between London and Birmingham

£6.6bn
the amount awarded in contracts
7
civil works packages

16,000
the number of civil-engineering jobs alone to be created by the project

2026
the date first trains are due to run between London and Birmingham

2033
the date the full Y-shaped network is expected to be in operation

Review of fire safety in buildings needed post-Grenfell Tower disaster

In the aftermath of the horrific Grenfell Tower tragedy in June, the cladding on 190 tower blocks across 51 local authority areas in England has failed fire-safety tests. With 100 per cent of the cladding samples tested found to be combustible, the scale

of the exercise in assuring fire safety in buildings across the UK is becoming increasingly apparent.

David Orr, chief executive at the National Housing Federation, said: "Putting this right will require a strategic look at the issue

of fire safety in buildings as a whole, as well as clear prioritisation and funding from government."

A report from the Housing and Finance Institute (HFI) has called for a moratorium on the construction of new tower blocks until their safety

can be assured. The HFI said that one million new homes can still be delivered by 2022 without the need for high-rise tower blocks, focusing instead on building lower-level dwellings at greater density and accelerating construction outside of cities.



NEC4 contracts to play key role in the construction industry digital revolution

NEC4, the next evolution of the NEC suite of contracts, is to play a key role in setting the 19th-century “analogue” built environment sector on the path to a critical digital “industrial revolution”, according to Dr David Hancock, head of construction at the Cabinet Office. The contracts’ collaborative and flexible ethos will help UK industry move towards the “massive behavioural change needed to embrace a critical digital future”.

Dr Hancock added that NEC4 is “central to strengthening the government’s capability as a construction client”, and that the suite’s central themes of

collaboration and shared understanding towards efficiency and risk management are key if “we are to enter a new era of true manufacturing capability”.

The suite, published in June, builds on the success of NEC3 contracts first introduced 12 years ago. The launch of NEC4 reflects the continuing evolution of industry practice while retaining the NEC processes for collaboration, fair dealing and good project management. The contracts have been updated and streamlined following industry feedback, evolving government priorities and emerging best practice.

AROUND THE UK

UK GUARANTEES TO BE EXTENDED TO COVER CONSTRUCTION

Chancellor Philip Hammond has announced plans to extend the UK Guarantees scheme to cover construction guarantees for the first time. The government will also consider other credit-enhancement tools, such as first-loss guarantees, to reduce the financial risk faced by complex projects. He said: “Investors need certainty in order to continue to support the UK economy and create jobs as we leave the EU. That is why we will fortify the vital financial support that helps businesses to grow – from cutting-edge start-ups right through to large-scale infrastructure projects.”

NEED TO PRESS ON WITH MAJOR INFRASTRUCTURE

Chairman of the National Infrastructure Commission Lord Adonis has urged that Brexit and a hung parliament do not delay or defer infrastructure projects that are critical to the UK’s competitiveness and productivity, and published a list of the ‘top 12’ immediate priorities on which ministers must make rapid progress in the next year. The list includes HS2, new electricity-generating capacity, digital and broadband roll-out, Crossrail 2, HS3 (the ‘Crossrail for the North’), and the new Thames crossing to relieve the M25 Dartford crossing.

In support, Dr Adam Marshall, director general at the British Chambers of Commerce, commented: “Infrastructure projects, both large and small, give real confidence to business communities across the UK. They ‘crowd in’ additional business investment, generate skilled jobs, and support stronger two-way trade with customers and suppliers all across the world.”



AROUND THE WORLD

SAUDI INVESTMENT IN US INFRASTRUCTURE

US private-equity firm Blackstone and Saudi Arabia's main sovereign wealth fund, the Public Investment Fund (PIF), plan to create a \$40bn vehicle to invest in infrastructure projects, mainly in the US. The proposed venture was announced during President Donald Trump's visit to Riyadh. Trump has said he wants to rebuild crumbling US infrastructure, which is graded D+ by the American Society of Civil Engineers, while independent estimates put the country's infrastructure funding gap at up to \$2 trillion. The new fund "reflects our positive views around the ambitious infrastructure initiatives being undertaken in the US", said the PIF's managing director, Yasir al-Rumayyan.

NEW SHIPPING TUNNEL

Having already constructed the world's longest road tunnel (Lærdal Tunnel), Norway is to construct the world's first tunnel for ships. At 45m high and 36m wide, the 1.7km long Stad Ship Tunnel will be the only one of its kind – a passage through solid rock able to accommodate 16,000-tonne freight and passenger ships. Construction is likely to start in 2019, and the tunnel, which is expected to have between 70 and 120 ships passing through it per day, is scheduled to open in 2023.

IN NUMBERS

How does the UK's holiday entitlement compare with that of other countries? In terms of public holidays, not well...

55	16	15
India	Japan	Finland
9	9	9
Germany	Ireland	Switzerland
9	8	7
UAE	UK	Mexico

Career framework for civil servants

A framework has been launched that will help project delivery professionals across the civil service to consider career options, and plan and take control of their career.

The *Project Delivery Capability Framework* was developed by the Infrastructure Projects Authority and project delivery representatives from the main government departments. It contains three elements: the career pathways in which 19 core project delivery roles and levels have been identified and mapped; 19 technical (aligned to APM) and 10 behavioural competencies for the range of skills required; and a development section that signposts the right development for individuals.

The interactive document will help existing and potential project delivery professionals to explore the different roles within the profession, and, combined with an online skills tool, to evaluate their current skills and identify areas for development for both current and future roles.

The framework will be of mutual benefit. The input and engagement of individual professionals will help the civil service to understand its own project capabilities across teams, departments and the civil service as a whole, and to prioritise resources and develop capabilities in order to aid delivery.



£10m fund for North East property projects

A new £10m property fund aims to support smaller-scale construction and property development projects in the North East.

The North East Property Fund has been created in response to strong demand from smaller construction and property development companies that are unable to access mainstream finance from traditional sources, and aims to kick-start

development in smaller property ventures across the region. The fund, managed by FW Capital, is backed by Santander and the North East Local Enterprise Partnership (LEP). It offers short-term loans for small and medium-sized construction and property development companies. Loans from £250,000 up to £1m are available for non-speculative residential and commercial developments

Companies struggling with internet of things-based projects

It is predicted that the number of machine-to-machine connections across the internet of things (IoT) will grow from 14.9 billion at the end of 2016 to more than 82 billion in 2025. Despite the forward momentum, a recent Cisco study shows that 60 per cent of IoT initiatives stall at the proof-of-concept stage, and that only 26 per cent of companies have had an IoT initiative that they considered a complete success. Even worse: a third of all completed projects were not considered a success.

Of the 1,845 IT and business decision-makers in India, the UK and the US surveyed across a range of industries, more than half (54 per cent) cited collaboration between IT and the business side as the number-one factor behind

successful IoT projects. In addition, organisations with the most successful IoT initiatives leveraged ecosystem partnerships most widely. They used partners at every phase, from strategic planning to data analytics after roll-out. Sixty per cent of respondents stressed that IoT initiatives often look good on paper but prove much more difficult than expected to execute. The top five challenges across all stages of implementation are time to completion, limited internal expertise, quality of data, integration across teams and budget overruns.

However, there are positives to be drawn. Sixty-four per cent agreed that learnings from stalled or failed IoT initiatives have helped accelerate their organisation's investment in IoT.



in County Durham, Northumberland and Tyne & Wear. Typical repayment terms are between nine and 18 months.

In the North East, an estimated 6,440 homes were built last year, against an annual target of 9,000; only 1,420 of the 3,800 target for affordable homes were built in the region.

David Land, North East LEP Investment Panel chair, said: "Our ambition is for the North East to return to pre-recession housing rates of more than 6,000 new houses a year, and this new fund provides smaller construction firms with the confidence to pursue projects to build vital new housing."



90 DAYS IN THE LIFE OF...

Project meets Neil Foreman, project director at CH2M

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

I have been in my current role for the past three years, but supporting the same new build project in various roles for the past seven. Nuclear infrastructure projects tend to be long, so more of a marathon than a sprint. The best aspects of the job are the complexity and the technical problems it brings with it – a new challenge every day.

What have been the biggest professional challenges that you have faced over the past 90 days and why?

Project handover: despite highly competent project and client teams, this process has been all-consuming to everyone involved. Handover

must be clearly defined and cannot start early enough; maintaining relationships throughout what has been an infuriating process has proven crucial to success and sanity.

What is the most important lesson that you have learned over the past 90 days?

I have taken part in several independent project reviews that have been hugely valuable to the projects reviewed. For me, this has re-emphasised the importance of sharing experience and embracing different perspectives on what are often similar problems.

Looking ahead to the next 90 days, what will be the biggest challenges facing you and why?

I am a part-time researcher studying cost escalation in

major projects, for which I am currently developing my analytical methodology. I am passionate about the subject, but it is also an issue the profession needs to understand better. This methodology defines my research for the next two years and the contribution to practice that it ultimately achieves; it will certainly be my biggest headache over the next 90 days.

If you had the opportunity to spend 90 days with anyone – living or dead – who would that person be and why?

Professor Bent Flyvbjerg (a prolific contributor in mega-project and cost-escalation research) – he is a recognised guru in my own field of study.



DIARY DATES

28 September 2017

APM Women in Project Management Conference, The Progressive Project Professional, London

5 October 2017

Governance SIG conference, London

10 October 2017

North West Branch Conference 2017, Macclesfield

19 October 2017

PMO SIG conference, London

20 November 2017

APM Project Management Awards 2017, London

5 December 2017

APM Project Management Conference Manchester

For more information, visit apm.org.uk/events

Construction shift away from London and the South East

Contract awards on major regeneration and infrastructure projects have seen 'hotspot' pockets of construction emerge across the UK as investment in housebuilding, infrastructure and commercial shifts away from London and the South East. Norwich and east Norfolk led all districts across the UK in 2016, with more than £2.7bn worth of construction contracts, helped greatly by the year's largest contract award, the £1.8bn East Anglia ONE offshore wind farm. Birmingham was a residential, commercial and infrastructure hotspot, driven by the award of contracts for the

regeneration of Connaught Square, Exchange Square, Paradise Circus, Arena Central and Snowhill.

The report from Barbour ABI and the Construction Products Association analyses construction contract awards on both growth and contraction – hotspots and 'coldspots'. The majority of coldspots are clustered in the residential sector and replicated across the country, as contract award values fell from the highs registered in 2015, falling below long-term averages. In the South East, Yorkshire & Humber and the East Midlands, one-third of sub-regions were residential coldspots.





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Consultation now open on APM's proposed standard for Chartered Project Professionals

The Royal Charter gives APM the power to create and maintain a Register of Chartered Project Professionals, to award post-nominal descriptors, and to regulate the professional conduct and discipline of Chartered Project Professionals.

As the Chartered body for the project profession, APM faces the key task of developing the Chartered standard to underpin the profession's new status. The creation of a robustly assessed Register of Chartered Project Professionals who are committed to continuing professional development (CPD) and a code of conduct will raise standards in project management for the benefit of society and the economy.

The proposed Chartered standard reflects what APM considers the public and industry will need from project professionals in future. This reflects the technical knowledge and professional experience that project professionals must demonstrate, along with a commitment to CPD and ethical behaviour, to achieve the internationally recognised standard of a Chartered professional.

It is proposed that Chartered Project Professionals will be able to demonstrate:

- advanced technical knowledge and understanding of how to deliver projects/programmes/portfolios, taking into account many interacting factors and approaches;
- successful application of this knowledge to deliver projects/programmes/portfolios that involved:
 - uncertainty or conflicting objectives;
 - high levels of unpredictability or risk;
 - multiple work packages/projects/programmes; and
 - multiple interdependent stakeholders, possibly with competing interests.
- commitment to professional ethics; and
- currency of practice and commitment to CPD.



YOUR VIEWS MATTER

The consultation will seek views on high-level principles rather than detailed guidance or assessment methods.

It is open to all, but aims in particular to get employers, government, professional bodies in

related disciplines, higher education and other interested parties to engage with the proposed Chartered standard, and to secure informed responses.

- You can access the Chartered consultation via apm.org.uk. The closing date is 22 September 2017

Inspiring positive change

Reflecting its new status as the Chartered body for the project profession, APM has refreshed its strategy. Professional project management has never been more vital or relevant to today's society, and APM continues to change to meet the challenges of a complex and dynamic world.

However, the project profession faces many challenges: there are still too many projects that fail; the application of successful practice is too frequently ignored; and failure often lies beyond the boundaries of traditional project management.

APM chair John McGlynn said: "We have revisited APM's vision and mission to reach out to different communities and generations, and establish project management as a core skill. Our vision is ambitious, challenging and radical. We recognise that to deliver it we need to inspire everyone to understand the contribution they can make to project success.

"The APM mission, our purpose, is to inspire all those communities that are engaged in delivering meaningful change to apply the art, science, theory and practice of project

management. Equally, APM is committed to advancing our collective knowledge in the art, science, theory and practice of project management, and in doing so contributes directly to achieving our vision.

"This new mission represents a significant shift towards a more outward and inclusive focus for APM, aligning with our charitable objectives and our belief in a more adaptive and diverse profession committed to delivering societal benefit."

- The 'Inspiring positive change' APM strategy is available at apm.org.uk/strategy



Realising benefits in a changing world

On 22 June 2017, APM's Benefits Management Specific Interest Group welcomed 150 benefits management decision-makers, practitioners and enthusiasts to the Holiday Inn, Kensington, for the third annual Benefits Summit.

Sponsored by Hyde Park Solutions, the core theme of the day was 'Realising benefits in a changing world', with four underpinning sub-themes: organisational transformation, business case, portfolio management and working with partners.

The packed agenda comprised two keynote speakers, presentations, case studies and workshops, supported by

innovations and technologies including the use of Mentimeter (a tool for audience polling, and capturing reaction and questions), graphic illustrators, mind-mapping and a literature competition.

Tony Meggs, CEO at the Infrastructure and Projects Authority, addressed the topic of transforming programme benefits as typically "melting and moving away" during project delivery. Steve Jenner, author, practitioner and trainer, closed the day with his usual tour de force performance, 'Show me the benefits! Optimising the return on investment on projects and programmes'.

Transport Change Practitioner Group

It was the longest day of the year, and the hottest June day since 1976, but 21 June saw a packed house attend the APM Enabling Change Specific Interest Group's (SIG's) Changing Transport event at British Airways' (BA's) headquarters near Heathrow.

Following the Thames Valley branch AGM and a welcome from BA head of business transformation Robbie King, Simon Williams, head of business change project management at Transport for London and an Enabling Change SIG committee member, introduced the work of the SIG's Transport Change Practitioner Group.

Formed in 2015, the group has established a number of sector-specific practitioner groups made up of senior change practitioners, along with an academic and author working in the field, to focus on best practice and common challenges for implementing change in different environments. With objectives including thought leadership, knowledge sharing, identifying issues and constraints, and advancing practical solutions, the

groups are looking at a number of key challenges, including:

- the speed of technical change compared to long lead times for transport infrastructure;
- network complexity;
- lack of integrated transport policy;
- the political and regulatory environment; and
- organisational and individual capabilities.

Following the production of a report detailing its recommendations, the group is now keen for more people to become involved to help take forward the next phase of its work.

Following this, Sam Pritchard and Jason Smith from BA introduced a case study explaining the airline's move from the North to the South Terminal at Gatwick Airport, and the package of change activities that were put in place to overcome the number of significant challenges in delivering the project.

● Slides from the event are available at bit.ly/2wHZ4oH. Interested in getting involved with the Transport Change Practitioner Group? Contact simon.williams@tube.tfl.gov.uk

Doctor of engineering award for APM Honorary Fellow

Congratulations to APM Honorary Fellow Philip Isgar, one of the North West's leading lights in the civil-engineering sector, who was recently awarded an honorary doctorate by the University of Bolton.

Philip said: "In receiving this award, which reflects on my civil-engineering background, I would like to put project and programme management into context as a parallel skill that totally complements my overall career, with the University of Bolton being at the leading edge. To have travelled the journey from the 1970s, when project management was in its infancy, to this point in time, I have been truly blessed to have worked with fantastic people and collaborative teams that have helped shape, developed and shared my career.

"The opportunity that now exists through APM with the [Royal Charter] and career options gives the young people of today the opportunity of having project manager as a career of first choice."



New contracts guide launched

The launch conference for APM's *Guide to Contracts and Procurement: For Project, Programme and Portfolio Managers* was held in London on 12 July 2017.

Dr Jon Broome, chair of the APM Contracts and Procurement Specific Interest Group, commented: "It is the only publication on the market that, to my knowledge, provides a roadmap for the procurement and management of projects and programmes as opposed to the more

academic 'what' only reference-type books from other organisations."

Conference delegate Jason Curtis said: "I think it is a user-friendly and easily digestible guide, with plenty of 'how' in it. I will certainly be making practical use of it on my next project. I'd even be so bold as to suggest every project manager who is procuring goods/services/'other' as part of their scope should read this guide first."

● **The guide is available for purchase at apm.org.uk/book-shop**



(L-R) Conference organiser James Buckley-Walker with the *Guide to Contracts and Procurement* team of Dr Jon Broome, Alastair Greenan, Anne Dwyer and John Lake

Are you ready for the PM Challenge?

Run annually by various APM branches, the PM Challenge competition is a great way to promote project management skills to a younger generation. The event has grown in scale over the past nine years, partly due to successful competitions run by Thames Valley, Wessex and Scotland, to name just a few. Each branch has a similar approach to the competition, which started out with the aim of offering students or graduates the opportunity to practise project management in a friendly, competitive and supportive environment.

The PM Challenge provides the opportunity for entrants to develop their project management skills and benchmark their knowledge, understanding and capability against their peers. Teams work with a mentor to deliver their own project, experiencing the real-life hard and soft skills required, while developing the qualities needed to become an effective and successful project professional.

PM Challenge competitions provide a great opportunity for APM members to get involved with volunteering. The competitions are run as small projects, requiring a variety of roles to ensure success.

● **APM's Thames Valley branch will be launching its seventh PM Challenge competition in October. Organisations that wish to enter the competition may register their interest at bit.ly/2wpuHUL**

Profile of an APM volunteer



Name: **Jacob Achenbach**
Job title: **programme lead - War on Waste, Rolls-Royce**
Membership grade: **Associate**
Volunteer role: **deputy chair and head of events, Midlands branch**

Why did you decide to volunteer with APM?

I wanted to give something back to the industry. There is a lot of work ahead of us before the UK workforce and businesses achieve project management excellence. The opportunity to serve as a volunteer allows me to attract wide audiences of project management professionals to our events, which can develop their careers, grow their skills and expand professional networks.

What benefits have you gained from volunteering?

It's a great chance to develop leadership, because leading volunteers is very different to leading full-time employees. It is also a fantastic way to gain new contacts in the industry and build relationships. It also makes you visible; by being an active volunteer, you can become the face of APM in your local area.

Which events are you most proud of being involved with?

All the events that benefited our attendees in some way and allowed them to grow. Our events are for everyone involved or interested in project management. Every time we help someone on their journey, I am very proud.

Any advice for members looking to volunteer?

Please get in touch. We are an open community with more ideas than time, and are always looking for help. If you see something that is not working and could be improved, please let us know. We make this organisation and you could make a real difference.

FIND OUT MORE

IF YOU ARE INTERESTED IN FINDING OUT MORE ABOUT VOLUNTEERING, PLEASE CONTACT ANNA.GRABHAM@APM.ORG.UK



Top left: Student of the Year – Helen Rose, University of Warwick
Top right: Project Management Simulations Final winners – Coventry University
Bottom left: Student Group of the Year – Coventry University
Bottom right: Young Project Manager of the Year – James Faflik, Gleeds Management Services

Recognising young talent in the Midlands

Young project managers have until 15 September to enter this year's competition for APM Midlands branch Young Project Manager of the Year.

This will be the second iteration of the awards that celebrate the next generation of Midlands project management talent. It follows 2016's finals, held at the Rolls-Royce Learning & Development Centre in Derby, where the winners were announced in four categories:

- **Project Management Simulations Final – Coventry University;**
- **Student Group of the Year – Coventry University;**
- **Student of the Year – Helen Rose, University of Warwick; and**
- **Young Project Manager of the Year – James Faflik, Gleeds Management Services.**

Nominated by Gleeds for his role in the delivery of the GlaxoSmithKline

Carbon Neutral Laboratory for Sustainable Chemistry at the University of Nottingham, James Faflik balanced the requirements of leading such a complex project while also studying for an MSc in project management.

After his win, James commented: "Following my career change from sport science, I have worked hard to build a career in this industry, so to have gained this kind of recognition is extremely gratifying. Bringing teams of talented people together to deliver iconic buildings that will stand the test of time is a privilege, and I hope I can go on to inspire others to follow in my footsteps."

● **The closing date for entries to the APM Midlands branch Young Project Manager of the Year awards 2017 is Friday 15 September 2017. Information, rules and question packs can be obtained by emailing ypm@apm-midlands.org.uk**

Balancing your change portfolio

The APM Portfolio Management Specific Interest Group (Pfm SIG) hosted its fourth annual conference on 11 May 2017 in London. Around 110 people from a wide variety of business sectors heard a diverse range of presenters describe the main factors that helped their organisations build a balanced portfolio aimed at achieving strategic objectives.

The conference also saw the formal launch of the SIG's thought-leadership initiative, 'Managing the portfolio' by Peter Glynn from the Pfm SIG committee. This series of reports will cover four key stages of thinking, providing meaningful insight into the practical issues facing leaders of change across all industry sectors, challenging existing ideas and providing a fresh perspective on what makes portfolio management successful in delivering corporate strategy.

Following interactive workshops, the conference finished with a panel of speakers and committee members answering challenging questions from the participants, followed by a well-attended informal networking evening at the Marquis Cornwallis pub.

The SIG committee is very grateful to all the speakers, colleagues from other SIGs, sponsors and exhibitors, APM staff, and delegates for making the day such a success.





Agile *business conference*

Success with Agile in Unpredictable Times

London, 4 & 5 October 2017

This year's Conference, "Success with Agile in Unpredictable Times", takes place in London on 4 and 5 October. It is being organised by the Agile Business Consortium, the not-for-profit body that pioneered Agile business thinking some 20 years ago and continues to be at its forefront as Agile moves to enterprise-wide applications from its IT and project management origins.

Hosted by Daniel Thornton, Programme Director at the Institute for Government, the first day of the event will feature keynote addresses from experts including Chris Roebuck, visiting Professor of Transformational Leadership at Cass Business School London, and Dr Patrick Dixon, ranked as one of today's 20 most influential business thinkers (Thinkers 50-Awards).

"Agile has been shown to be a powerful tool for business transformation whether in the public or private sector. These presentations by some of the world's leading international business thinkers will give delegates the opportunity to learn more about the latest developments in Agile, how it has been successfully implemented and the lessons that can be drawn."

Daniel Thornton
Programme Director at the Institute for Government



Book tickets at agileconference.org

As the UK comes to terms with the uncertainties arising from Brexit and a hung parliament, the focus of this year's Agile Business Conference will be building success during unpredictable times.

The second day of the conference will feature a diverse programme of collaborative workshops and roundtables to support further learning around three main themes: Transformation and Leadership, People and Culture, and Digital Services. The keynote speakers from day one will attend and facilitate this work.



"The Agile Business Conference provides a single forum for everyone interested in the application of Agile, or moving towards an Agile way of working. It is a unique gathering of influential Agile practitioners and leaders, interested in learning more about how they can help their organisations thrive in an increasingly uncertain world. The programme of hands-on workshops will guarantee attendees a full day of interaction with Agile experts and thought leaders, and help prepare them for success in an unpredictable world."

Mary Henson,
Chief Executive of the Agile Business Consortium

Conference Host

Daniel Thornton
Programme Director, Institute for Government

Latest Confirmed Speakers

Dr Steve Morlidge
Author "The Little Book of Beyond Budgeting"

Patrick Dixon
Futurist, Founder and Chairman, Global Change Ltd

Paul Shephard
Head of Development Engineering, Deutsche Bank

Dan North
Technology and Organisational Consultant, Dan North & Associates Ltd



John Lewis



Organised by

4 for the price of 3 ticket offer available



Your view



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

GUIDANCE FOR GOVERNANCE OF CO-OWNED PROJECTS

In the summer 2017 issue of *Project*, Eddie Obeng focused on the issue of co-owned projects. He wrote that “placing a bet on an easy-to-monitor, turnkey, painting-by-numbers project is much less risky than betting on a hard-to-monitor, co-owned project that is lost in the fog”. Eddie cited the challenges that come with bringing two or more different cultures together to co-own and co-deliver projects, and shared five ‘tricks’ to increase the successful longevity of co-owned projects.

Anyone working as part of a co-owned project will probably be facing such issues, and would have found that Eddie’s words resonated with their situation and experience. They should value his five tricks.

To complement Eddie’s words, there is additional help at hand for all those involved with, and responsible for, the governance of such endeavours. APM’s *Governance of Co-owned Projects* provides advice and guidance on many aspects of governance that, if followed, will increase the chances of a successful outcome to a co-owned project.

To order it, visit apm.org.uk/book-shop/governance-of-co-owned-projects

Martin Samphire, director at 3pml Ltd and chair of the APM Governance Specific Interest Group



COUNTING THE COST

Am I the only one to be surprised by the cost and duration (£12m and three years) to move the £24m Halley VI Research Station structure that was designed to be moved in harsh conditions (‘Off-the-shelf solution’, summer 2017)? *Project* needs to be more critical on strategy and performance.

Ian Koenig, Quality IS Projects, Inc

Correction: In the summer 2017 issue (page 17, ‘Your View’), an incorrect definition of MoSCoW appeared in Andrew Craddock’s letter due to an editing error. The definition given should have been that used by the Agile Business Consortium: ‘must have, should have, could have, won’t have this time’.

PM ON TWITTER

MITSLOAN MGMT REVIEW

@mitsmr

The Four Dimensions of an Effective Why Statement
<http://mitsmr.com/19b2wEU>

#projectmanagement #business

PRINCE2.COM

@prince2blog

Here are the 7 BEST #projectmanagement mobile apps currently available
<http://buff.ly/2t8ZRgr>

WORKZONE

@workzone

What is the Most Popular City for Project Management? <http://bit.ly/2u1BV5d>
#pmot #projectmanagement

STRATEGY EXECUTION

@2080strategyex

Nine Skills You Need to Move into Programme Management
dlvr.it/PWTsbp #pmot

FOLLOW PROJECT
@PROJ_JOURNAL



LINKEDIN PEER-TO-PEER ADVICE

THE ISSUE

How are people identifying and managing dependencies across a group of projects and programmes? I am keen to hear how other organisations approach this.

Karen Simeons

THE REACTION

I have held ‘alignment’ meetings where project managers or work-stream leads share status and progress with each other and identify interdependencies. Identified dependencies are stored and

cross-referenced in the relevant RAID logs and monitored by a central hub, such as a project management office. Timeline dependencies should be logic-linked in a Gantt chart of a suitable level so that there is a clear view across multiple activities of prerequisites, joint working, etc.

Darren Griffiths

I maintain a project portfolio dependency register, which contains information about each dependency. I keep only the incoming, deliverable-based dependencies.

Each project also keeps its incoming dependencies and reports their status on a monthly basis.

Vratislav Paulik

The part I always found harder to show is the resource dependencies (constraints) across a portfolio. In IT projects that is a common problem. I found it was reasonably effective to classify engineers and developers by key skill set and then group projects in dashboards to show the connections.

Manica Selan

Best of the blogs

IF YOU WANT TO WRITE A
BLOG FOR THE APM WEBSITE,
CONTACT KIRSTEN BIRD –
KIRSTEN.BIRD@APM.ORG.UK

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



FIVE WAYS TO MAKE PROJECT REPORTING AN EFFECTIVE STAKEHOLDER ENGAGEMENT TOOL

Posted on 8 June 2017 by Fran Bodley-Scott, a specialist in marketing and communications, customer relations and stakeholder engagement, and a member of the

APM People Specific Interest Group

Regular communication is essential for good project management, and reports have a role to play in keeping stakeholders informed about milestones, issues, resolutions, costs, risks and next steps. However, just circulating a report on its own is unlikely to achieve the goal of 'communication', which is to successfully exchange information.

Stakeholders do expect regular reporting. They want to see that you are tracking progress against budget, schedule and scope, and that you are flagging potential risks and pre-empting roadblocks. They are a willing audience in terms of having you email, phone, visit, attend their meetings, even corner them at the water cooler. (Trust me, having a willing audience is a significant asset when it comes to communication.)

So how can project managers take advantage of this willing audience and use progress reporting as a productive and effective process? Here are five suggestions:

- 1. Be clear about what you want to achieve each time you communicate**
Instead of just sending out a report each week, use that progress-update event to drive a particular outcome. Use a personal covering note or phone call to get the relevant message across. The report plays a supporting role, providing backup data if required.
- 2. Make it easy for stakeholders to receive your intended message**
People are increasingly reading emails on a tablet or smartphone, so start your message with a brief description of what you need them to know. Further explanation can be provided later on in the email, or in a voice message, but don't just direct

them to page four of the report that's in their inbox.

3. Provide what they need to know, not what they don't need to know

There is a point where communication becomes over-communication. Ask what each stakeholder requires with regard to reporting and updates in terms of format and frequency. Make a judgement about what information stakeholders really need, which is not always what they ask for.

4. Change the format to wake people up

Change the routine now and again to encourage people to take notice – eg summarise your update report in three PowerPoint slides rather than a five-page Word document.

5. Evaluate and review your approach

Sending a message does not mean it has been received or understood. Follow up every now and again to check whether your updates are achieving your objectives.

If you're not seeing the outcomes that you need, such as decisions made or feedback provided, then ask how you can improve the way you provide information.

Review stakeholders' communications preferences regularly, asking whether they feel your updates continue to be relevant, useful and sufficient.

For more on this topic, visit APM's stakeholder engagement resource at apm.org.uk/resources/find-a-resource/stakeholder-engagement

SUSTAINABILITY – THE PROGRAMME LEADERS' LEGACY



Posted 6 June 2017 by Chris Beach, a Chartered engineer and programme management professional, and a member of APM's Programme Management Specific Interest Group Committee

Often, the overriding focus of the leaders within major programmes is to ensure the objectives of the programme are achieved to time and within the available budget. To achieve this, significant time and resource is devoted to tracking and reporting on performance metrics. The more mature programmes will also establish active engagement with stakeholders, effective management of risk, and perhaps even some formal processes to plan and measure benefits realisation.

Sustainability is an aspect that is only occasionally given the same level of effort or attention it deserves, particularly in commercially led programmes where the focus tends to be on achieving a fixed return on investment or a defined payback period.

The *APM Body of Knowledge* defines sustainability as "an environmental, social and economically integrated approach to development that meets present needs without compromising the environment for future generations". This recognises that programme strategies need to consider the triple bottom line of planet, people and profit to create improvements in the short term without creating a negative impact in the longer term.

It is incumbent on programme leaders to work with their sponsors to ensure that all those involved in the programme – consultants, designers, contractors and product suppliers, to name a few – place sustainability at the heart of all decisions.

It would seem that major infrastructure programmes have been leading the way on the sustainability front, with some great examples created from London 2012, Crossrail and the Thames Tideway Tunnel, among others, particularly through creating social, economic and learning legacies.

These major programmes have the advantage of scale, and often have a requirement to demonstrate a commitment to sustainability imposed on them through the consent and approval processes. Programmes that operate on a smaller scale lack these drivers to fully consider the sustainability of their plans. However, as programme management professionals, we need to create the environment and the approaches that position sustainability on an equal footing to cost and time.



Take people with you

It is only by truly understanding an organisation's people that leaders can effect true change, argues **MIKE CLAYTON**

"Books on change management don't sell."

I remember getting that message from my publisher and thinking: "What about John Kotter and the Cheese guys?"

But she was right. Interrogate the data and you'll see the standard book-sale power law, but with a particularly steep curve. A few titles dominate a relatively small market, and the long-tail books sell barely a handful. It seems many of us are content to learn about managing change from articles, slide sets and tweeted rules of thumb.

Perhaps that's fine for the moment. Because it seems to me that the rules are changing. And just saying that is making a big presupposition – that we ever really knew what the rules were.

Let's take an example. Lasting change needs to come from the bottom of an organisation. Top executives can't just impose it. If they try, they will face a wall

I DON'T THINK THERE ARE ANY RULES ABOUT HOW TO MAKE CHANGE. THERE ARE JUST PEOPLE. UNDERSTAND HOW WE WORK, SHOW US COMPASSION, TREAT US WITH RESPECT AND OFFER US SOMETHING WE'LL VALUE

of resistance and covert subversion, and the change won't stick. Somewhere down the line, their successors will see the futility, and quietly reverse out.

On the other hand, we also know that people won't make a change unless they see people at the top supporting it. If less than 75 per cent of top management endorse the change, it won't last. That's a figure cited by change management guru Kotter (interviewed on page 35).

So, change needs to come from the bottom and it must be led at the top. Whose rules are these anyway?

I think the answer lies somewhere in the nexus of academics, authors and consultants. Practitioners just get on with it. But if there are rules at any time, it seems to me they do little more than reflect the prevailing social norms. After all, different cultures around the world support their own models of organisational change.

And for much of my adult life, here in the UK – and in many of our culturally closest neighbours – society has been moving towards greater respect for individuals and their diverse points of view. That's a trend I've enjoyed.

But it's also one that some parts of society want to challenge. There is also a greater appetite for authoritarian structures, and less adherence to evidence-based policymaking. We're seeing a greater desire for simple solutions, delivered with blunted messages.

So, who says change needs to be led from the bottom and that people at the top must take responsibility? What I'm seeing is change led from the very top, justified by patriarchal arguments about the rest. And I'm seeing blame and excuses start to supplant true responsibility throughout organisations.

Yet perhaps this is the natural state of human affairs. It certainly prevailed for most of recorded history. Appeal to people's fears about the 'others' – competitors or enemies. Justify your failures as the result of outside forces. And push for tighter controls, greater efforts and more stringent incentives.

A cold wind is blowing through the cultures of many British organisations, and project managers stand in that wind. You may not be able to stop the wind blowing, but you are in a position to channel some of it to make light, warmth and useful energy.

I don't think there are any rules about how to make change. There are just people. Understand how we work, show us compassion, treat us with respect and offer us something we'll value. Then you can lead us anywhere.

As project managers, we learned this early on. And we see it every day. Leading change has no rules. Just take people with you, one at a time, day by day. **□**



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

The climate change challenge

PROFESSOR PETER MORRIS explains why and how the project management profession should take a proactive role to address the causes and consequences of climate change

There is now wide agreement that the emission of greenhouse gases by man is raising Earth's temperature to the point where massive and widespread damage to its flora and fauna is inevitable. What should project management's position be on this alarming situation? And how does this square with APM's new Chartered status? These are questions that I explore in a new APM publication.¹

First, we need to approach the challenge with more vigour and discipline – something more robust than just sustainability, which lacks the focus and urgency needed. This has become apparent through the work sponsored by the UN over the past 10–15 years, culminating in the 2015 UN meeting in Paris, at which 197 'Parties to the Agreement' pledged to take actions to hold the rise in the world's temperature to 2°C, or less, above pre-industrial levels, with the ultimate aim of making that rise 1.5°C. (This will require moving to a position of negative emissions.)

Failure to achieve these targets will unquestionably lead to flooding, loss of habitat, substantial migration and demographic change, and widespread disruption to our way of life.

Implementation of the Paris Agreement is not as strong as the threat warrants. Responsibility is decentralised to the parties, who are required to develop their own plans and report periodically to the UN. Why isn't there a more directed response with a single point of accountability, supported by

SO MANY BIG, COMPLEX PROJECTS OVERRUN; WE MUST IMPROVE OUR RELIABILITY

a programme management office, either for the programme as a whole or at national or regional levels? Some say that this would prove impractical. But I would argue that, if it were war and our survival was so obviously threatened, we wouldn't give up so easily. Well, in effect, it is war.

The report looks at the impact project management is having on reducing emissions. There are many 'business as usual' and 'transformation' mitigation projects where project and programme management have important and successful roles. They are also central to the two large R&D programmes bearing on climate change: nuclear fusion and carbon capture and storage. Unfortunately, the track record for these big programmes is not good. The profession has a long way to go before we can say it has a reliable contribution to make. In fact, the trend is away from these large new technologies towards smaller-scale photovoltaic and wind projects.

This said, the UK government has decided that nuclear fission, financed by the private sector, should provide the country's baseload of electrical power. Unfortunately, nuclear is an incredibly difficult and expensive technology to build. Hence, we have ended up with Hinkley Point C (HPC), with its likelihood of cost and schedule overruns, procured with an old-fashioned disregard for risk sharing. The prospect of contractual claims looms large – a view recently echoed by the National Audit Office. To add insult to indignity, the next plant scheduled to follow HPC was to be built by Hitachi, only its nuclear arm, the old Westinghouse, has just gone into Chapter 11 bankruptcy protection following huge losses on its US projects. All in all, we have to conclude that our project management competence is not supporting

adequately the UK's ability to meet its emission targets.

Another important area is portfolio management – for example, in dealing with potential flooding and in producing integrated infrastructure. The difficulty, particularly in producing integrated infrastructure, is not so much in the technique as in decision-making, and ultimately the lack of environmental stewardship: there is no overall sponsor.

The role of the sponsor is key – for example, in aligning strategies, setting behaviours and making decisions. But in reality, there is, at government level, neither a 'single point' sponsor nor an integrated strategy for dealing with carbon emissions.

So, what should the profession's response to climate change be? Among the several characteristics of professionalism, three stand out: ownership of a distinct body of knowledge, competence and ethical behaviour. On the first, we need to do better. The fact that so many big, complex projects overrun indicates we must improve our reliability. But it is the ethical dimension that poses the biggest challenge: as professionals we should be advising on what is good for society and behaving accordingly. Too many of us are not. **□**

¹ *Climate Change and What the Project Management Profession Should Be Doing About It: A UK perspective* (due to be published in late September 2017)



PETER MORRIS is professor emeritus of construction and project management at University College London, and vice-president of APM



What are the key factors in successful change?

PARAG GOGATE of APM's Enabling Change Specific Interest Group gives an overview of the group's research on conditions for project success

Almost all organisations undergo change of varying degrees, complexity and magnitude, with billions of pounds being invested every year. The cost of failure can have a catastrophic effect for the organisation and its people; therefore, it is critical to understand the success factors to improve outcomes and optimise return on investment.

Success factors are management practices that, when implemented, will increase the likelihood of success of a change initiative. Their presence does not in itself guarantee success, but their absence will contribute to failure. These success factors form a framework that describes an organisational environment vital for success of change initiatives, and provide a mechanism to help organisations improve. The degree to which these practices are established and embedded within an organisation are indicative of its capability and maturity.

ACTIONS SPEAK LOUDER THAN WORDS. IT IS IMPORTANT THAT SENIOR LEADERS AND SPONSORS ADVOCATE AND ACT AS ROLE MODELS FOR THE CHANGE

Building on APM's research on *Conditions for Project Success* (2015), the Enabling Change Specific Interest Group (SIG) carried out desktop research and identified six key factors that are known to contribute to the success of change initiatives. This was further validated through a pulse survey carried out by the SIG, where the participants recognised all

six key factors to be important and ranked them in descending order of importance.

1 FORMULATE A CLEAR VISION AND STRATEGY, SUPPORTED BY WELL-DEFINED BENEFITS

People are more likely to accept change if they understand why it is happening, what it will entail and how it will affect them. Individual change projects and programmes must be aligned with the overall strategy of the business and coordinated to create a manageable 'picture' of change.

Taking a bottom-up, as well as a top-down approach, involving people in the definition of the vision, is the best approach – as well as clearly articulating the drivers for change (why it is happening) and desired outcomes.

Make sure people understand how the vision differs from business-as-usual ('to be' versus 'as is') and review on a regular basis to ensure relevance. Well-defined outcomes and benefits provide tangible benchmarks for people to understand, aim for and ultimately measure in terms of how successful the change has been.

2 ENSURE STRONG LEADERSHIP AND SPONSORSHIP

Actions speak louder than words. It is important that senior leaders and sponsors advocate and act as role models for the change. Sponsors need to have the necessary sphere of influence, the time available and the attributes to deliver, such as communication and listening skills, integrity, the ability to engage and

inspire, trust, emotional intelligence, and gravitas.

Involve the relevant people to drive and support change so that there is real ownership of the change from the wider business. It is also important to have feedback mechanisms in place so that improvements can be made.

3 UNDERSTAND, ENGAGE WITH, BUILD COMMITMENT FROM, AND SUPPORT ALL STAKEHOLDERS

Stakeholders will perceive and respond to change differently; therefore, it is important to understand, engage with, build commitment from, and support these stakeholders through the entire change life cycle. Identify stakeholders early in the change programme, carry out a potential change impact assessment, and develop an engagement and communication strategy to build commitment.

Communication alone does not guarantee engagement. Take time to really understand your stakeholders – their perspectives and motivations. Nurture your stakeholders to build trust, so that they want to help you make the change succeed and feel supported through it (win hearts and minds). Consider the psychology and behaviours of change and pitch the timing of interactions at the point where they will have the most impact (neither too early nor too late).

4 BUILD A STRONG CHANGE TEAM WITH THE NECESSARY CAPABILITIES FOR SUCCESS

Build and nurture the change team to make it a high-performance unit that



combines a clear focus on its task with strong interpersonal relationships. Make sure that the purpose or remit of the team is well defined, and in relation to other teams, including the overall programme or project team. Equip team members with the necessary change process and soft/people capabilities or skills to enable successful change.

Ensure that you have the right people in the team, that it is diverse and multidisciplinary, that roles and responsibilities are well defined, and that there are recognition and reward mechanisms in place. Understand people's motivations within the team to help develop understanding and ensure that you play to people's strengths. It helps if team members have strong relationships with stakeholders, communicate well, and have a passion and energy for their remit.

5 DEFINE AND FOLLOW A WELL-STRUCTURED AND INTEGRATED APPROACH

If your organisation does not have a defined and structured way of managing change, then consider adopting one of the many well-documented change methodologies and standards. Ensure that, in all cases,

you take a holistic, integrated approach that covers all aspects and is the right fit for your initiative and its environment. This is important to ensure everyone in the change team is aligned, to ensure consistency of delivery, and to improve capability and maturity for greater success.

Be structured (without being dogmatic) and flexible in your approach to match the nature of change. Manage programme/project interdependencies across the whole organisation, avoiding a silo mentality and wasted effort. Have regular review and feedback loops to continually improve the approach for even greater success.

6 MEASURE THE SUCCESS OF THE CHANGE INITIATIVE

Organisational change is often a non-linear, evolutionary discovery process, and it is not possible to know absolutely everything at the beginning. The external and internal organisational environment can change during the process, and it is very difficult, and even unrealistic, to evaluate a change initiative in the same way as other aspects of the business, such as operations.

Measures can be an excellent tool for engaging and communicating with the wider organisation and stakeholders on

the effectiveness and impact of the change over time, and for seeking feedback. Make sure you have a baseline and success criteria at the outset, and relate measures to the originally defined vision, outputs, outcomes and benefits. Have a mix of qualitative and quantitative measures, paying attention to relevance, measurability, and ease of data collection, analysis and presentation. **P**

FIND OUT MORE

APM's *Introduction to Managing Change* is now available. To order it, visit bit.ly/2wDm6gz. Learn more about the Enabling Change SIG at bit.ly/2woXCsb.

For more perspectives on change management issues, turn to *Project's* special report on page 45.



PARAG GOGATE is a managing consultant at **Ambition Group**, and a committee member of the **APM Enabling Change SIG**



GETTY

THE NEW TALENT PIPELINE

A host of modern apprenticeship schemes are blazing a trail into the project profession.

SALLY PERCY investigates

Apprenticeships are a fundamental pillar of the UK's skills policy.

The government has set a target of three million apprenticeship starts between 2015 and 2020, and it has also introduced an apprenticeship levy on employers with payrolls of more than £3m – 0.5 per cent of their annual pay bill. Funds raised from the levy are being combined with government contributions to subsidise organisations that train apprentices.

The nature of apprenticeships is also changing. New apprenticeship standards, known as 'trailblazers', have been developed by groups of employers, with the aim of equipping apprentices with the knowledge, skills and behaviours that they will need to succeed in their chosen occupation. These new standards are designed to replace the previous apprenticeship frameworks in England.

APPRENTICE PROJECT MANAGERS

APM is part of a trailblazer employer group, led by nuclear-fuel reprocessing and decommissioning site Sellafield, which developed the new level 4 associate project manager apprenticeship standard. Launched in November 2016, it includes the APM Project Management Qualification

“THE PROJECT MANAGER ROLE IS QUITE ASPIRATIONAL. IT’S SOMETHING THAT MILLENNIALS LIKE THE SOUND OF. PEOPLE USED TO FALL INTO PROJECT MANAGEMENT, BUT IT HAS BECOME MORE OF A CAREER CHOICE, ESPECIALLY FOR YOUNG PEOPLE”

as an on-programme assessment. Apprentices will become student members of APM during the programme, progressing to associate member status on completion.

“As a Chartered body, it’s important for APM to be in line with the government and public-sector activity,” explains Stephen Miller, quality and product manager for trailblazers in APM’s professional standards department. “Also, APM wanted to create a first career path into project management, because the majority of project managers come into it as a second or third career. Apprenticeships enable young people to start on a career in project management directly from school, college or university. They can then go on and take further qualifications.”

The typical duration of the new apprenticeship is two years. Over this period, apprentices gain both a practical and theoretical understanding of various aspects of project management, including budgeting, communication, governance, planning, procurement and stakeholder management. Learning is provided by the employer in the workplace and external providers that deliver training online, as well as in colleges.

Apprentices must pass an end-point assessment to qualify as associate project managers.

For school and college leavers, the associate project manager apprenticeship presents an attractive alternative to university because of its long-term career potential. It is not the same as doing a degree, however.

“Because it is a level 4 apprenticeship, apprentices will get a qualification that is equivalent to doing the first year of university,” Miller says. “It is above A-levels and BTEC Nationals, but it is not equivalent to a degree.” That said, APM is currently developing a level 6 degree-equivalent apprenticeship that should be available by the end of 2017.

Employers in a range of sectors have launched their own project management trailblazer schemes, from construction and defence to financial services, the media and the civil service. Miller expects there will be more than 400 apprenticeship starts in the 12 months to 31 March 2018.

The rapid pace of change, together with project managers’ crucial role in driving change, explains why employers are investing in apprentices for their project management functions.

“I’m starting to see employers who have not previously established project management structures in their organisations start to establish them,” says Miller. “They are training people to be project managers at entry level for the first time.”

APPRENTICE PROFILES



ABBY HINDLE

Abby is a trainee project manager at Turner & Townsend, based in Manchester. She opted not to go to university, favouring an apprenticeship instead, because it would allow her to start a career while learning at the same time.

“My experience of the apprenticeship scheme has been very positive,” she says. “Everyone I’ve worked with has been supportive and helped me to improve my skills in some way.”



CHARLIE CLIFFE

Charlie had not considered a career in project management until he came across the Lloyds Banking Group apprenticeship scheme. He likes the scheme because it allows him to explore different areas of project management while gaining

a professional qualification and getting paid.

“You get the necessary time and support to make sure you are ready to step into a project management role once you have completed the course,” he says.

THE EMPLOYER PERSPECTIVE

British Airways (BA), which has run a level 4 project management apprenticeship scheme for three years, will launch its own trailblazer programme in September 2017. Five apprentices – four female, one male – will start on the programme, which attracted a high calibre of applicants.

“The project manager role is quite aspirational,” says Priti Kharbanda, apprentice programme manager at BA. “It’s something that millennials like the sound of. People used to fall into project management, but it has become more of a career choice, especially for young people.”

The BA trailblazer programme will run for two-and-a-half years. During that time, apprentices will do four six-month placements on projects across the business, in areas as diverse as catering, engineering and revenue management. This will be followed by a final placement, where they will play a leading role in a major project. If they complete the programme successfully, they will be offered the opportunity to stay on in a permanent role.

All of BA’s apprenticeship schemes – there are 14 across the group – are linked to its high-level resourcing strategy.

“We like growing our own,” Kharbanda explains. “We find there’s a benefit in people understanding our culture and how we do things.”

She emphasises that BA’s apprentices help the company to deliver on its vision of being smarter, leaner and faster, and working together: “Millennials bring in excellent data skills and they encourage people to use productivity tools, such as SharePoint.”

Vernon Martin, BA’s head of portfolio office business transformation, adds: “Apprentices make a real contribution to our delivery, and help us challenge existing practices and ways of working.”



DEVELOPING THE STANDARD

Wes Robinson of Sellafield's project delivery directorate chairs the national trailblazer employer development group for project management apprenticeships. A number of other well-known employers are part of the group, including BAE Systems, the BBC, British Airways, Lloyds Banking Group, Royal Mail and Turner & Townsend. SMEs are also represented, and Sellafield was keen to make sure that their voices were heard alongside those of larger companies as the new level 4 standard was developed.

"To bring industry experts together regularly on working groups was exciting," says Robinson. "And for Sellafield to lead and coordinate the group was something that I am extremely proud of. I was an apprentice myself, so I appreciate the importance of a good-quality apprenticeship and what it can do for you to set you off on a future career."

"What is special about a trailblazer apprenticeship is that it will ensure that all project management apprentices are measured and assessed against the same competences, regardless of whether they work for a company with 10 employees or one with 10,000 employees. This makes project management available to all, something that is important as we work together to grow the profession."

Project management consultancy Turner & Townsend sees apprenticeships as a great way to attract a diverse range of talented people.

"Project management is a broad church," says Lindsay Pilling, project director, infrastructure. "We are looking to attract people who are passionate about delivering great outcomes for clients, no matter if that is a small refurbishment project or a multibillion-pound infrastructure project like Crossrail. The new apprenticeships reach out to people who might not normally consider a career in project management."

During Turner & Townsend's two-year level 4 trailblazer programme, its apprentices work on live commissions under the supervision of a line manager and an apprenticeship development manager. They rotate either within or across projects to gain the knowledge, skills and behaviour that they need to complete the apprenticeship. Also, they spend either one day a week or one week a month at a local college, where they learn about the different elements of project management. Around 12 people across the UK are expected to go through the programme in the next year – some will be school leavers but, since there are no age

restrictions on trailblazers, others will be career changers who move over from other industries.

"The apprentices are learning as they are doing, so they pick up things a lot more quickly," Pilling explains. "At the end of two years, we have well-rounded individuals with the appropriate knowledge and experience to build a great career in project management."

She points out that apprenticeships fit well with the nature of Turner & Townsend's business, saying: "We are a practical business. Learning on the job helps to bring project management to life."

CROSS-INDUSTRY STANDARD

Lloyds Banking Group is part of the employer group that developed the new trailblazer standard. It will be rolling out the new scheme to 34 of its own apprentices, who will make up the 2017 cohort.

"This is a standard across all industries," says Jennie Jarman, head of group change approach at Lloyds Banking Group. "If you

"WE ARE LOOKING TO ATTRACT PEOPLE WHO ARE PASSIONATE ABOUT DELIVERING GREAT OUTCOMES FOR CLIENTS, NO MATTER IF THAT IS A SMALL REFURBISHMENT PROJECT OR A MULTIBILLION-POUND INFRASTRUCTURE PROJECT LIKE CROSSRAIL"

earn it here, you could potentially go and be a project manager in any industry, not just financial services."

All apprentices at Lloyds Banking Group start by doing six months in a project management office role.

"This orients them to the group and they get an overview across the portfolio, so they start to understand how it all fits together," Jarman explains. "Then they move onto assignments to gain the experience they need as part of a well-structured scheme."

Overall, Lloyds Banking Group has a target of employing 8,000 apprentices, including around 200 project management apprentices, by 2020 as part of its Helping Britain Prosper Plan. Across the group's schemes, the youngest apprentice is presently 16, and the oldest is 60.

"We massively value our apprentices," explains Jarman. "They bring in new energy, enthusiasm and talent. We are building our professional change community for the future, and we see our project management apprenticeship scheme playing a huge part in our success." ■

EMPLOYER GUIDE

APM has launched a comprehensive guide for employers that want to find out more about apprenticeships. It explains what apprenticeships are, the benefits of operating them, the process of setting up an apprenticeship and how the funding works. It also contains case studies that showcase the experiences of apprentices.

■ To download the guide, visit bit.ly/2vglpbl

SALLY PERCY is a freelance business journalist

A new railway for Australia's biggest city



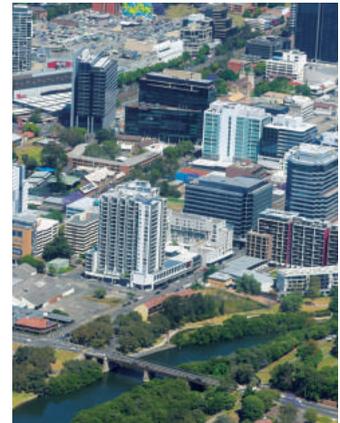
Sydney Metro is Australia's biggest public transport project.

The city-shaping Sydney Metro West project is proposed to deliver a new connection between the central business districts of Parramatta and Sydney, linking communities along the way.

Industry engagement has started

Sydney Metro is seeking input from across all industry sectors - both locally and internationally - to ensure a market led and innovative approach in the project's development.

This engagement includes helping define the project to meet transport and land use outcomes as well as market sounding on how the project could be delivered.



The growing Parramatta city centre

Interested parties are invited to register to participate in the industry engagement process taking place between 25 September and 27 October 2017.

Registrations of Interest close on Friday 1 September 2017.

For a registration form, contact the Industry Engagement Team at: industry.sydneymetro@sydneymetro.info or visit www.sydneymetro.info/industry

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BUILDING PROFESSIONALISM

CPD is a key element of Chartered status. A new APM paper looks at how you can incorporate it into your professional life

APM's new status as the Chartered body

for the project profession is an important milestone. It also brings with it a set of opportunities and responsibilities for APM and its membership – for example, abiding by a code of professional conduct and complying with continuing professional development (CPD) requirements.

As work continues on the establishment of the Register of Chartered Project Professionals, APM has launched the latest in its series of thought-leadership papers, *The Growing Significance of CPD: Ensuring professionalism in a dynamic and changing workplace*.

Written by Professor Andrew Friedman of the Professional Associations Research Network, the paper sets the context for APM's and the profession's future journey, concluding with initial thoughts on how APM as a Chartered body needs to adapt and support members – both corporate and individual – in their journey to professionalism using CPD.

THE IMPORTANCE OF CPD

Considered the third pillar of professionalism, CPD provides benefits for individuals, the professional and wider society, as follows:

FOR THE INDIVIDUAL

CPD is important for your own development; it enables you to plan your career and demonstrate to current and future employers, and clients, that you are up to date. It creates a shared landscape with peers, raises self-confidence, integrates your professional community, and increases the visibility of individual and collective professional development. CPD can improve confidence in a member's competence, as well as encourage certain crucial characteristics that are of great value to professional practice, such as planning, reflection, critical evaluation and adaptability. As a result, it can support career development at a time when working for a single employer for life is no longer the norm.

FOR THE WORKPLACE/COMPANY

CPD is important for employers in terms of maintaining competence and improving practice. It can provide a learning and development (L&D) programme for small-scale employers, and act as support for programmes already in place for larger employers. It can help guide the development of such programmes, saving resource on organising training.

Another interesting advantage to employers is that strengthening their L&D programmes with the CPD of major professional bodies can make them more attractive to potential employees. This is of increasing importance to top-level employers, which compete fiercely for the most talented staff.

FOR THE PUBLIC

Ultimately, a more competent set of professionals means better and safer professional services. It is important for the public to know that those carrying out professional services are up to date with legal and technical requirements. It is also essential for the public to know that professionals have been regularly reflecting on their ethical behaviour, and that ethical codes are not merely window dressing or simply aspirational.

HOW CAN YOU UNDERTAKE CPD?

CPD is part of APM's FIVE Dimensions of Professionalism and fundamental to today's business environment. It ensures that you have the breadth of knowledge to illustrate your commitment to lifelong learning in a rapidly changing environment.

APM expects professionals to undertake 35 hours of formal and informal professional development every year. There are many ways you can undertake CPD – did you know that even reading your quarterly issue of *Project* can count? Here are some suggestions of how you can incorporate CPD into your schedule:

- private reading;
- socialising/networking with colleagues/friends;

- work assessments and projects;
- attending seminars and conferences;
- tutoring and mentoring others;
- the design of plans to undertake activities that will contribute to learning, and evaluating and reflecting on those activities;
- organising and participating in branch and specific interest group meetings;
- volunteering work; and
- formal further qualifications and degrees.

Increasingly, professional bodies are regarding practice itself as a source of CPD, though only if reflected on and/or evaluated. Those using this pure, output-based approach to CPD measurement emphasise that what matters is not what CPD activities were undertaken, but rather their consequences. What did you learn? How did it affect your practice? How did it affect your future plans? How did it impact on others?

CPD allows professionals to organise their learning in a systematic and standardised manner. It is likely that, in future, it will become essential for employment, as well as reassuring and impressing clients and customers. CPD will provide assurance that professionals have up-to-date evidence of continuous adherence to a relevant programme. It will serve the same purpose as the framed evidence of a university degree or a professional qualification. In short, CPD represents a kind of 'new professionalism' and, as such, it is predicted to continue to enhance the reputation of professionals and professionalism. **■**

THE 'ROAD TO CHARTERED' PAPERS

In addition to the CPD paper, the following 'Road to Chartered' papers are available for download:

- *21st-century Professionalism: The importance of being Chartered;*
 - *For the Public Good? Volunteering in the Chartered profession;* and
 - *The Importance of Ethics in Professional Life.*
- More papers will be published throughout 2017 and into 2018. Visit bit.ly/2vPh840

UNDER THE WEATHER



Bad conditions and other factors cause delays on construction projects. **DAVID CRAIK** looks at strategies available to project managers to help mitigate the effects of such occurrences

Construction sites throughout history have been vulnerable to unforeseen events, be they violent storms, earthquakes, volcanic eruptions or armed attacks.

We may not have Mongols or Romans at the gates today, and, in the UK at least, the direct threat of volcanoes and earthquakes is low – but preparing for the unexpected is vital for any construction site project manager.

Weather can cause turbulence for a project, given the delays that rain, snow or wind can cause to timetables, budgets, and the health and safety of workers.

But to what extent do project managers build such contingency into their project plans? And how seriously do they take the issue?

Gavin Lawless, contracts manager at specialist engineering firm Keltbray, who is working on residential development at The Stage in east London, says weather is a vital part of his early project planning.

“Our site is circa 7000m² and is wide open to the elements, so the impact of weather is important during all seasons,” he says. “For example, both cold and hot weather can affect how you manage large concrete pours, as it affects the chemical reaction within the concrete, so the mix may have to be tailored to suit the environment on the day. On very windy days, our cranes will be put out of action, and you need to ensure that all materials stored are made safe. The monoflex, which is solid to encapsulate a structure during demolition, may need to be cut to allow for wind to pass through, or it will act like a sail, causing a much larger issue.”

Lawless says that, before every job, he makes allowances for such delays: “We can only estimate how many days we will lose to weather. We look at daily and weekly forecasts for the area, and look for trends. On a monthly and weekly basis we will review our upcoming works and ▶



Failing to plan for adverse weather results in projects falling into disarray



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how they may be affected by the weather, and move and plan accordingly.”

ASSESSING THE RISK

Construction management consultant Paul Netscher says it is tricky to cover all likely events.

“Risks are viewed differently by the client and the contractor,” he says, “but the contractor can’t be expected to account for risks that it could not expect. Normal weather events should be allowed for and priced by the contractor – but this is not the case for unexpected, abnormal weather. After all, how much abnormal weather should you allow for? Allowing for every event that may happen would make projects prohibitively expensive.”

Netscher also references other, non-weather factors: “Contractors operating in areas prone to power cuts should allow for these in their price. But a sudden spate of unexpected power cuts can’t be allowed for. Life is full of risks – driving a car and travelling by aeroplane bring risks. We limit these risks by choosing safer airlines and cars. We don’t stop flying or driving. We need to manage risks through the life of every project.”

He says that, ideally, risks in construction must be allocated to the party that can best control them: “Owners and clients who try to pass all the risk to their contractors will end up with many contractors declining to price their projects, and those that do adding significantly to their price to cover the additional risks they are expected to carry.”

THE NEED TO REFOCUS

Netscher believes that project managers do not give weather the focus it deserves: “Contractors are eternally optimistic and never seem to allow for any weather-related impacts on construction projects. If you have 20 inches of rain in three months, it will almost certainly disrupt your project. But, if the average for the region is 20 inches over that period, you shouldn’t be surprised. You should have made allowance for it in your construction schedule and taken mitigating measures. It is not just the direct time lost – rain or wind can cause damage to partly completed structures that could take days or weeks to repair.”

So, how can this be mitigated? Netscher has the following advice:

- During the bid or tender stage, project managers need to understand the expected weather conditions at the location and discuss the related issues with their client.
- Project managers need to schedule activities in accordance with the weather,



A collapsed crane atop the Cabinet Office, London, following a bad storm



such as closing up site work ahead of expected wind or rain.

- Different construction techniques can be put into action, such as modular construction and precasting, to keep the project on track during bad weather.
- Put protection measures in place, such as open-cut storm drains to channel rainwater away from work areas, and secure loose materials before high winds hit.

EXPERT PREDICTIONS

Accurate and timely weather forecasts are clearly vital. One source of these is the Met

“A CONSTRUCTION SITE IS A LIVING ORGANISM, AND SOON A PROJECT MANAGER IS FACED WITH 600 THINGS TO DO. SO, MISTAKES HAPPEN, AND AFTER A STORM YOU FIND SCAFFOLDING HAS BEEN BLOWN AWAY”

Office, which has a dedicated business and construction team that caters for construction project managers.

Steven Davey – sport, leisure, industry and infrastructure manager at the Met Office – says the organisation helps construction project managers at all phases of a build, from project planning and delivery to analysis.

“When planning, you can assess what the site conditions are likely to be using long-term averages and one-in-10-year event data,” he explains.

For project delivery, the Met Office has created a new online weather tool called VisualEyes. It offers location-specific weather alerting, with forecasts out to 14 days highlighting weather patterns of concern, and allows the customer to set specific amber and red warnings, triggering email and text alerts.

“You can set your own operational thresholds,” Davey explains. “So, when they are breached – such as the temperature falling below 2°C, meaning concrete should not be poured – you will be alerted. You can also track the direction of travel of a storm to protect against lightning strikes, or wind at height.”

“Forecasts at days eight to 14 give more of a climatological view, but we are very



confident about the accuracy of forecasts up to seven days. We have recently acquired a new £97m supercomputer to improve our prediction capability, so our accuracy is constantly improving to the point where we are seen to be one of the most accurate meteorological services in the world.”

Davey says the system has been up and running for just longer than a year. He admits that there are not as many people in the construction industry who know about VisualEyes as there should be, but stresses that, when introduced to the system, “people quickly see how it can benefit construction operations management”.

The Met Office can also help with analysis with regard to proving the need to claim for downtime on contracts such as JCT, NEC3 and NEC4.

“We produce historical reports looking back over a month – showing, for example, that the project had to be delayed in May because of exceptional weather circumstances,” Davey says. “We make calculations to see if an exceptional weather event has occurred on-site, and present these as one-in-10-year figures and long-term averages. This was previously only possible with data from weather stations, but today we can be pretty much location specific, allowing for geographically representative reporting.”

WEATHER ALERTS

Ulrik Branner, chief executive at construction management software group GenieBelt, says weather-alert technology can be the “tap on the shoulder” project managers need.

“Project managers may be focused on weather at the start of the project, looking at all the statistics, but it often slips down the priority list,” he says. “A construction site is a living organism, and soon a project

manager is faced with 600 things to do. So, mistakes happen, and after a storm you find scaffolding has been blown away because it has not been secured.”

GenieBelt has devised new technology that communicates with project managers about weather changes and what strategic actions to take.

“We inform them that a storm is coming next Monday, but we also know that this is when they have scheduled crane work – or that the temperature is set to drop to -12°C when they are pouring concrete,” Branner says. “Our system lets them know in advance through noise alerts on their smartphones to prepare and clear the site of loose building materials, or to reschedule pouring. So, we combine strategic and site data with weather data and inform on what needs to change. We believe you can reduce the cost of a build by nearly five per cent if you reduce errors, and weather delays are part of that.”

It is not just cost. Branner says the health and safety of workers will also benefit: “Think of the impact and toll on the human body of working in bad weather. Weather technology helps protect workers.”

Keltbray’s Lawless agrees: “The weather rarely changes too much from what is expected season to season, but what has changed is the focus on the health of workers and what effects the weather may have on our guys. As a wide-open site, you could have localised areas where dust gets kicked up. You need to plan for this and ensure there is a strict dust-control regime in place. The use of dust monitors and wind gauges ensures that we can keep an eye on these environmental risks.”

Of those who work outdoors, construction workers account for the largest proportion of skin cancer cases, with 44 per cent of deaths. Lawless has signed up to a new research project involving 10 Keltbray employees at The Stage, Heriot-Watt University and the Institute of Occupational Medicine. The workers are using a smartphone app that sends them text messages reminding them to cover up and protect their skin if heat and UV levels rise.

“The workers have also provided blood samples to measure vitamin D levels. We want them to maximise the benefits of that in summer and ensure that, in winter, they maintain healthy muscle and bone strength,” says Lawless. “We don’t want their health or well-being to be affected.” ■

DAVID CRAIK is a business journalist and editor

CASE STUDY

QUEENSFERRY CROSSING

The Met Office’s work on the new Queensferry Crossing road bridge in Scotland is an example of how weather forecasting can help a build. Rain, strong winds, icy conditions and the ‘haar’ fog can create tricky working conditions, explains the Met Office’s Steven Davey.

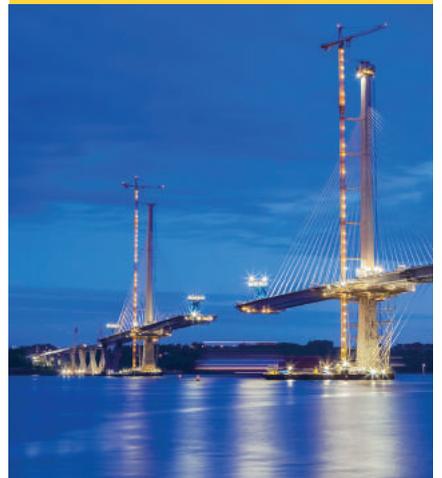
Builder Forth Crossing Bridge Constructors (FCBC) approached the Met Office to help mitigate the impact of the weather on the construction plan and build.

“In the pre-construction phase, we conducted a study of the proposed bridge site, using our Virtual Met Mast, a site-specific wind-prediction solution, together with a general climate assessment from the nearby Edinburgh Gogarbank meteorological observation site,” Davey explains.

“We gathered information on the climate of the build site, and identified times of day when winds would potentially be at their highest and lowest speeds, and the times of year when wind shear would be at its greatest and least. We also provided a rainfall analysis of the build site. This enabled the construction design team to evaluate and refine its structural designs to best mitigate any impact of the weather, and the project management team to assess schedules for the construction phase.”

During the build phase, FCBC received a five-day site-specific forecast giving an hourly breakdown on the first day. They used the Met Office’s web-based planning tools to plan weather-dependent tasks.

“The team was able to optimise when it hired large and expensive equipment,” Davey adds. “They were also notified via alerts of changes to wind speed or direction that could cause problems on-site.”





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KING OF CHANGE

How can project managers help their organisations navigate today's most complex challenges?

SALLY PERCY spoke to change guru Dr John Kotter for his insights



“I BECAME CONVINCED THAT ONE OF THE MOST IMPORTANT FACTORS BEHIND WHY SOME PEOPLE OUTPERFORM OTHERS IS HOW WELL THEY CAN HANDLE A FAST-CHANGING WORLD”

In the world of change management, Harvard professor Dr John Kotter is royalty. Widely considered the foremost authority on the topics of leadership and change, he is a prolific writer who has authored 20 books, including 12 bestsellers. His seminal work, *Leading Change*, first published in 1996, remains the go-to guide on change management. It outlines a practical, eight-step process for managing change, from establishing a sense of urgency to anchoring new approaches in an organisation's culture. More than a million copies of the book were sold within the first 10 years of publication. In 2011, *TIME* magazine listed it as one of the top 25 most influential business management books of all time.

The question of why some organisations do so much better than others has fascinated Kotter throughout his career, and continues to do so today. His interest was first sparked 50 years ago when he belonged to a college fraternity at the Massachusetts Institute of Technology

(MIT). There he studied electrical engineering, followed by a master's degree in science in management. His fraternity was a “troubled institution”, he recalls.

“We had two pieces of very expensive real estate and 70 members. We were responsible for feeding them, rooming them, tutoring them and organising their social lives. At the age of 20, I started becoming intrigued by what it takes to make this function better.”

He also drew inspiration from Edgar Schein, a renowned thought leader in the field of organisational development and a professor at the MIT Sloan School of Management. Later, during his doctoral programme in human performance at Harvard, Kotter also learned much from his professor, Paul Lawrence.

“I became increasingly convinced that one of the most important factors that explains why some people outperform others is how well they are able to handle a fast-changing world,” he says. “The more I thought about it, the more I realised ▶

“A LOT OF PEOPLE WORK IN CULTURES THAT WERE DESIGNED IN A SLOWER-MOVING WORLD”

leadership was directly related to handling change, just as management was more directly involved in making complex systems run well every day.”

Kotter believes the central challenge facing leaders in our age of disruption is “being able to run the organisation both very well and very efficiently, while at the same time constantly leaping into the future, which involves changing many strategically important things”.

Digitalisation is the obvious change challenge facing the world at present, but Kotter is clear that “there is a whole long list of other things” besides. The list includes ageing populations, industry consolidation involving mergers and acquisitions, and the rise of China.

“Very often it’s just changing to be able to deal with change,” he says. “A lot of people work in cultures that were designed, or emerged, in a slower-moving world and have habits that aren’t very good in a faster-moving world. A big deal is changing some aspects of culture.”

Kotter also highlights the need for speed: “You used to be able to execute a new strategy over three years, but that is just not acceptable anymore. It’s got to be done in two years, or a year and a half. If not, somebody else will go zooming past you.”

CHANGE PROJECTS

The difficulty with change projects, as Kotter himself acknowledges, is getting them right. History is littered with examples of change projects that have gone spectacularly wrong, within both the corporate sphere and government. For this reason, the typical reaction for many workers to the announcement of a brand-new change programme is a sceptical lift of the eyebrow. According to Kotter, that is an entirely natural response.

“What they’ve seen is often so unsuccessful that they’re being rational



by acting suspiciously and resisting the organisation wasting their time on one more effort that isn’t going to achieve much,” he says. “And will that be a problem in the future as the world changes more and more? Absolutely.”

So what can leaders and project managers do to make sure that their own change projects stay on track? Kotter cites three strategies for success – involve lots of people, win over their hearts as well as their minds, and give them the freedom to act. In his 2014 book, *Accelerate*, he also champions agile networks of ‘change agents’ within organisations as more effective structures for driving change than traditional hierarchies. This is particularly the case if an organisation is embarking on far-reaching, complex change – the kind of change that Kotter himself specialises in.

“The change projects that do particularly well get more people involved – not by appointing them, throwing money at them or ordering them, but by getting their hearts, as well as their minds, into the game,” he says. “They create a network organisation and they allow people to show initiative, to be proactive and to really lead – not just manage a project in a tight way.”

Kotter gives Dallas-based Southwest Airlines, the world’s largest low-cost carrier, as an example of an organisation that manages change well by following these principles.

Another point that he is adamant about is the need to learn from other organisations that have managed change projects well.

“I’ve got a lot of the inspiration from people who are actually running organisations and have done miraculous things,” Kotter says. “I wrote a biography of Konosuke Matsushita, the founder of Panasonic. His story of what is possible is incredibly inspiring, because it is so far beyond what we tend to think is possible.”

He adds: “I wish change leaders could go with me on my research trips so that they could see for themselves what works and what doesn’t work, and have experience beyond their own organisations. So many people are working with limited information based only on their own experiences. That’s not enough to be able to draw sensible conclusions. If you want to be a great Olympic athlete, don’t assume that you have a coach and a set of experiences that will make you one. Go out there, look for the coaches, look for the past and current



Olympic athletes, and see what they do. Learn, learn, learn!”

Kotter also highlights the need for project managers to distinguish between complex change and other types of change.

“There are all kinds of changes going on in organisations that project managers have done before and understand how to handle,” he says. “But if they are given something that is large and complex, they should stop for a minute and make sure that they don’t get into trouble because they haven’t had experience of something that is either that big and complex, or is going to happen that quickly. If they haven’t, they should put up the flag and admit it.”

“ANY PROJECT MANAGEMENT ORGANISATION THAT DOESN’T HAVE CHANGE MANAGEMENT EXPERTISE IS TAKING A RISK”

He also advises bringing in change management specialists, saying: “The fundamental principles that seem to drive successful complex change initiatives tend not to be at the heart of project management as it is practised almost everywhere today.” Naturally, these principles include involving as many people as possible, winning over their hearts and minds, giving them freedom to lead on initiatives, and adopting a network rather than a hierarchical structure.

“That is not to say that an initiative driven by these principles cannot have a little project within it that is best managed with a project management mindset,” he adds, “or that project management tools can’t be used by those who drive some complex change initiatives. But any project management organisation that doesn’t have change management expertise is taking a risk, because these days even small projects really do require some change.”

EVOLUTION PLAYS A PART

Kotter might be best known as an academic and author, but he is a businessman as well. In addition to his writing, researching and teaching, he is chairman of Kotter International, the consultancy firm that he founded in 2008, together with his wife Nancy Dearman and a former Microsoft executive. He saw the business as an opportunity to have an even greater impact than he was making through his books. Its aim, according to its founder, is to become the “pre-eminent firm in the world on the topic of leading complex change”.

As far as research interests go, Kotter’s current preoccupation is exploring how human reaction to change is built into our DNA: “What’s hardwired from evolution into our brains and bodies? That raises some very interesting observations about what challenges are involved with running organisations in a fast-moving world, and what some of the solutions are.”

Looking back, would Kotter make any tweaks to the legendary eight-step process that he outlined in *Leading Change*?

“Almost everything in that book is still applicable to the world,” he insists. “But in addition to the traditional structures, systems, processes and policies that you need to be able to deliver a product or

service every day in a reliable, efficient way, you also need to have a second system that can handle a series of bigger change initiatives.”

Hence, *Accelerate* expands the original eight-step process to encompass concepts such as the “single big opportunity”, the network and the volunteer army.

Given the huge contribution he has made to the practice of change management, it is understandable that Kotter likes to feel he is making a difference: “It’s enormously gratifying when you meet somebody who seems to have got some insight from your work. It’s a shame you can’t bottle that and give it to more people.” 

SALLY PERCY is a freelance business journalist

JOHN KOTTER’S PRACTICAL EIGHT-STEP PROCESS FOR CHANGE MANAGEMENT IN A FAST-CHANGING WORLD

- 1 Establish a sense of urgency around a single big opportunity**
- 2 Build and maintain a guiding coalition**
- 3 Formulate a strategic vision and develop change initiatives designed to capitalise on the big opportunity**
- 4 Communicate the vision and the strategy to create buy-in and attract a growing volunteer army**
- 5 Accelerate movement towards the vision and the opportunity by ensuring that the network removes barriers**
- 6 Celebrate visible, significant short-term wins**
- 7 Never let up. Keep learning from experience. Don’t declare victory too soon**
- 8 Institutionalise strategic changes in the culture**

Source: John Kotter, *Accelerate: Building strategic agility for a faster-moving world* (Harvard Business Review, 2014)

MINT CONDITION

MATT SCOTT talks to the programme manager responsible for the launch of the new 12-sided £1 piece, the most secure coin in the world



In 1983, the UK launched the first incarnation of the £1 coin. Fast-forward more than 30 years, and those first coins were still in circulation, along with a multitude of counterfeits.

The Royal Mint's 2014 *UK £1 Counterfeit Coin Survey* found that around one in 30 £1 coins in circulation was counterfeit, and that number, along with the quality of the counterfeits, was increasing.

David Garrigan, programme manager for the launch of the new 12-sided £1 coin, says this growing problem meant it was time for a new and more technologically advanced coin to be brought into circulation.

"As well as the increase in the quantity of counterfeits, there has also been a rise in their quality," he says. "This makes them more difficult to detect and remove from circulation – another reason to introduce a more secure coin, as approximately 45 million £1 coins across the UK were counterfeit.

"Although the counterfeiting rate was not critically high, the consequences from a loss of integrity of the currency were so large that HM Treasury felt it was appropriate to take early action. The introduction of the new and highly secure £1 coin will reduce costs associated with counterfeit coins for business, consumers, the taxpayer and wider society."

BANKNOTE-LEVEL SECURITY

The new coin, which became legal tender in March 2017, is thinner and lighter than the old round £1 coin, but with a slightly larger diameter. It features a new design comprising the English rose, Welsh leek, Scottish thistle and Northern Irish shamrock emerging from one stem within a royal coronet.

It is also the most secure coin in the world, featuring a number of visible safeguards, as well as an invisible 'high-security feature' that makes the new £1 coin the first in the world to offer banknote-level security.

"The visible security features of the new £1 coin have been widely publicised," Garrigan says, "but, for

the first time, a coin offers a banknote-level security feature. The coin has a feature within it that gives a clear, 100 per cent reliable 'yes/no' authentication reading when read with an appropriate detector.

"The new coin is a dodecagon – 12-sided – and bimetallic. In addition to the coin's other hidden and visible features, including micro-lettering and a latent image – similar to a hologram that changes from a pound sign to the number one when the coin is seen from different angles – it offers a range of added protection features."

INTO CIRCULATION

With 1.5 billion new coins required to be introduced into circulation, and a similar number of the old round coins needing to be retrieved from wallets, piggy banks and sofas up and down the country, the project was a complex and intricate affair.

It first started more than three years ago, when the Royal Mint and HM Treasury began liaising with businesses about the launch of the new coin. Garrigan says he and his team have been busy working on the project ever since – and they haven't stopped yet.

Although the formal consultations with stakeholders and initial production runs have been completed, coins still need to be introduced into the system, and old £1 coins taken out of circulation by October 2017.

Garrigan says the project has been managed within a formal project management

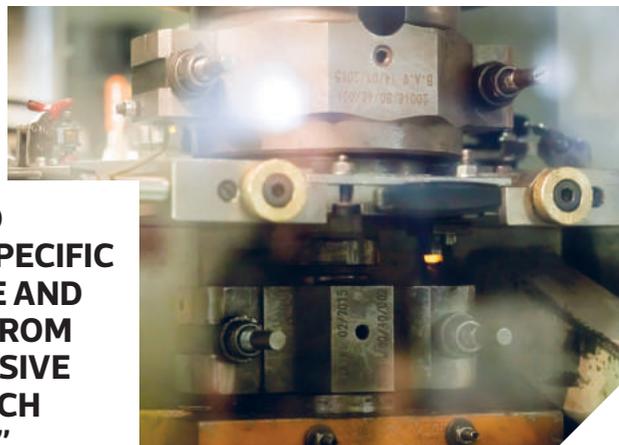
framework, but that the levels of governance have changed and evolved as the project has moved through its various phases.

"[The project] started with a relatively light touch in the policy development and planning phases," he says. "As the project moved to the delivery phase, governance was expanded and strengthened, as were the project management arrangements. The arrangements for the delivery phase will continue to operate until after the withdrawal of legal-tender status of the round pound in October."

MULTIDISCIPLINARY TEAM

The complex nature of introducing a new form of currency means that Garrigan's team needed to draw on a number of experts and specialists, something that was facilitated by in-depth work and consultation with working parties.

"The internal project team required a range of internal skills from policy development, technical specialists, production, planning, supply chain, communications and project management," Garrigan says. "The project also needed industry-specific knowledge and expertise from cash-intensive sectors such as banking, retail, transport, hospitality, gaming, etc. This was to identify interdependencies and understand



"WE NEEDED INDUSTRY-SPECIFIC KNOWLEDGE AND EXPERTISE FROM CASH-INTENSIVE SECTORS SUCH AS BANKING"

the impact of the change on their customers and suppliers. Key personnel from the cash-intensive industries have been involved all the way through industry working groups. Regular industry readiness surveys have also allowed the project to hear concerns, and have helped us to identify areas of risk and challenge.”

As with any project of this size and complexity, however, there have been challenges along the way. Foremost among these is the uniqueness of the situation. There has not been such a big change in British currency since the 1997/98 launch of the current 50p coin. Furthermore, significant changes to the banking and retail landscape over the past 20 years – such as the rise of self-service checkouts and more automated cash handling – mean that there was not an existing template for how to phase in the new design.

COMMUNICATIONS CHALLENGE

The sheer scale of the project was also a challenge for Garrigan, and meant that the team needed to be spot-on with its communications plan.

“There were hundreds of thousands of pieces of cash-handling equipment that needed to be upgraded to accept the new £1 coin,” Garrigan says, “including tens of thousands of self-service checkout machines that are now part of people’s daily lives. The scale [of the project] also required a meticulous communications plan. There are more than five million businesses registered in the UK, and they all needed to be aware of the transition and ready for the change.

“The public also needed to be made aware of the change and the security features of the new coin.”

SUCCESSFUL LAUNCH

Garrigan is also proud to say that, despite these challenges, the project is currently running both on time and on budget.



David Garrigan,
programme manager
at the Royal Mint



SIX STEPS THAT LED TO PROJECT SUCCESS

1. Scoping the project correctly from the start

This involved successfully identifying the sectors the project team should be consulting with, resulting in industry advocates helping to deliver the project.

2. Identifying interdependencies

The project team called on a range of industry-specific experts to help gain an understanding of the impact of the change on their customers and suppliers.

3. Adapting governance levels when required

As the project moved into its delivery phase, the governance levels were scaled up from a relatively light touch in the policy development and planning stages.

4. Successful management of stakeholders

The project team worked with key stakeholders from the cash-intensive industries throughout the life cycle to hear concerns and identify areas of risk.

5. Effective communications plan

A project of this scale needed meticulous communications planning to ensure businesses and the general public were aware of the new £1 coin.

6. Use of the latest technology

Thanks to its many design features, developed at the Royal Mint’s site in South Wales, the new £1 coin is the most secure in the world.

“THERE WERE HUNDREDS OF THOUSANDS OF PIECES OF CASH-HANDLING EQUIPMENT THAT NEEDED TO BE UPGRADED TO ACCEPT THE NEW £1 COIN, INCLUDING TENS OF THOUSANDS OF SELF-SERVICE CHECKOUT MACHINES”

He cites a number of factors that led to the project’s success.

“Scoping the project correctly at the start was important,” he says. “We identified early on the key sectors that needed to be targeted – coin-handling equipment manufacturers, the wholesale cash sector and national retailers. This was then extended as the communications around the introduction of the new coin launch dates became clearer.

“Early consultation with industry sectors and other representatives has been important in understanding the issues and challenges they will face, and not only helped build a coherent plan, but also developed industry advocates who assisted in delivering the project.”

Garrigan says the project has taught him some valuable lessons: “Good project management disciplines are critical to delivering success for a project of this scope, scale and complexity. With so many different functions and organisations involved, it provides a framework that marshals all stakeholders so they can bring their skills, knowledge and experience to bear.

“The disciplines helped identify interdependencies and aided regular communications across the various elements of the project.” **■**

MATT SCOTT is a business and data journalist



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In at the deep end

Liz Rawlinson's ability to adapt to change and solve problems was tested to the limit for her role managing the Bermondsey Dive Under project. Interview by **CHARLES ORTON-JONES**



If there's a secret formula to being a world-class project manager, it surely includes the ability to adapt. Throw a top-flight project manager into any situation and they'll dream up solutions to get around any obstacle.

Liz Rawlinson is a perfect example. She only graduated in 2010, yet time and again she has proven herself to be a master at adapting to change. Her biggest triumph has been her management of a major section of the £70m Bermondsey Dive Under project, part of Network Rail's Thameslink programme.

The project was conceived to allow slow trains to travel from the South East to Charing Cross without interfering with fast Thameslink services between Brighton and Blackfriars. A neat over-and-under design solves the problem. Rawlinson's mission was to prepare the site and begin construction, which turned out to be more difficult than expected.

"The site had a lot of challenges," she recalls. "When Network Rail cleared the arches of tenants ahead of construction work, it found abandoned vehicles, hazardous waste and bin bags full of rubbish. We had to clear the site before we could even start."

It turned out to be riddled with a more noxious substance – asbestos.

"There were also heavy metals and oils in the ground, and fly-tipped waste strewn everywhere," Rawlinson says. "My role morphed into managing the waste removal."

She'd never done anything like it: "I was thrown in at the deep end, so I trained myself. I worked through problems as they occurred, got advice and picked it up as I went along."

Asbestos is a difficult issue to deal with. Rawlinson learned that it's a threat not only to health, but also to projects: "The big problem is that it's not just a waste issue, it's a health-and-safety issue. You need to call in experts and shut down areas of the site. We lost two months on the programme at one point."

Nothing was easy. As the dig continued, there were more obstacles, she says: "To start the piling works, we needed to remove the concrete foundations of an existing bridge abutment after demolition. We went down 10m, still finding obstructions, before realising it was not going to work. We ended up redesigning the piles for the new structure. Events like this can have a huge impact on the cost and programme."

As things got more complex, Rawlinson found herself under pressure. Colleagues came to depend on her updates. It got to the point where she was overloaded with queries. It was time to come up with some ingenious fixes.

"I'm a very visual person," she explains, "so I created a room that acted as a live-update centre, with maps

showing stockpile storage, tables of testing progress, status of waste-removal procurement, and a run-down of the priorities for the coming week. People could see the status of each element in the project, and I held really productive progress meetings in that room. I nearly became a graphic designer, so it felt natural for me to work in this way."

As hiccups created delays, she worked hard to get the timeline back on track. Again, ingenuity was the key.

"There are always creative solutions," Rawlinson says. "On this project, we had to build the structures in a certain sequence – but by getting the whole team together in a collaborative planning session, we found a way to rejig the order. For example, we used temporary works to allow us to complete some lower-level piling and start bridge abutments while the higher-level piles were being redesigned."

She juggled staff, resources and programmes to maximise the effectiveness of everyone around her. Gradually, the job moved back on track. The site was handed over to Network Rail on time, while also meeting an ambitious environmental goal – a real success story, which formed the basis for Liz's entry for the Young Project Professional of the Year category at the 2016 APM Project Management Awards.

"We diverted 99.5 per cent of waste from landfill, which was helped by the huge amount of excavated material we reused on-site," she says. To cap things off, the site was planted with wild flowers, increasing biodiversity by 13 per cent.

Rawlinson is bursting with ideas on how to be a better project manager. She is an advocate of mentors, "both official and unofficial. It's too easy to get stuck thinking about the work in front of you. A mentor will challenge you to think about things from new perspectives."

She advocates hunting down the right people, whenever they are needed: "There was a great waste manager in head office, so I was on the phone to her regularly. I learned early on that if you aren't sure, ask. She recommended I talk to suppliers and other experts. That's how I kept learning, and now engineers within the company call me for practical waste management advice."

It seems that Rawlinson was born to be a project manager. She radiates enthusiasm for the profession.

"I like being outside," she says. "I like the day-to-day challenges and making things happen. Early on in your career, you can be master of your own destiny and be responsible for people. Even as a student, I had responsibility for whole sections of work. I fell in love with that." 

CHARLES ORTON-JONES is a business journalist and editor



“I WAS THROWN IN AT THE DEEP END, SO I TRAINED MYSELF. I WORKED THROUGH PROBLEMS AS THEY OCCURRED, GOT ADVICE AND PICKED IT UP AS I WENT ALONG”



LIZ RAWLINSON

Age: 30

Current position: Site agent

Current employer: Skanska

Years of experience: 7

Qualifications:

- MEng in civil engineering, University of Bristol
- Chartered member of the Institution of Civil Engineers
- IGNITE – project management (Skanska)
- Managing for High Performance, accredited by the Institute of Leadership and Management)
- Nominated, Young Project Professional of the Year, APM Project Management Awards 2016



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PROJECT SPECIAL REPORT

CHANGE MANAGEMENT

The *APM Body of Knowledge* defines change management as “a structured approach to moving an organisation from its current state to a desired future state”. Project managers have long recognised that this process often brings challenges – specifically, delivering ‘successful’ transformation that effectively embeds in an organisation and delivers sustained benefits.

In this *Project* special report, we hear from project practitioners who highlight what the future of organisational transformation will bring. In addition, two case studies from organisations that have implemented major change – Transport for London and Royal Mail – provide lessons learned and valuable insight into how successful change can be managed.

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What the future has in store for organisational transformation

PAGE 49

How Transport for London gained engagement on a cross-organisational change programme

PAGE 52

A case study from Royal Mail, highlighting how balancing conflicting demand ensured outcomes were achieved



WHY THE WHOLE ORGANISATION MUST BE INVOLVED IN CHANGE

Change management experts **DEBORAH FEAKINS** and **IRA BLAKE** discuss what the future has in store for organisational transformation

When is a programme truly transformational?

The definition of 'transformation' in the Business Dictionary is "a process of profound and radical change that orients an organisation in a new direction and takes it to an entirely different level of effectiveness". It adds that "transformation implies a basic change of character and little or no resemblance with the past configuration or structure". Think for a moment. Is this what transformation actually means in the context of our organisations today?

It seems that every other project, programme or change has the 'transformation' label applied to it – and it can be confusing. How can we know what is really going to impact our organisations the most, where the most pain will be felt and where the thrust of our efforts needs to be focused?

It is time to think again about how we deliver successful transformation. We need to look again at ourselves and our organisations to ensure we have the right understanding and capabilities. We need to move out of our traditional comfort zone of delivery and consider how we can improve our performance.

Our organisations today are faced with the reality of perpetual, unrelenting change. At the same time, the volume and velocity of change is increasing exponentially, driving a new practice of management.¹ Change and transformation are happening at such speed that traditional programme approaches cannot deliver quickly enough. There is no time to absorb, recover and prepare for the next thing; there is no business as usual (BAU), because the next thing is already happening.

This is driving a need to move beyond traditional project and change management. Here, we define change management as 'the long-term, sustainable realisation of benefits by ensuring the human element of change is successfully managed, while creating the conditions and encouraging the right behaviour for the change to be adopted'.

APM and its members have recognised the challenge this presents – how to deliver 'successful' transformation and deliver long-term sustained benefits realisation in a business-enterprise context or culture that is not change adaptable, agile or capable.

DELIVERING NOW

In the noughties, it was widely accepted that, in competitive environments, all new growth came from projects (for example, Nokes & Kelly, 2007). A survey of experienced project managers also revealed that two of the top five problems related to people: understanding them, and getting them to think differently and adapt their approach/style of working. In many cases, this became the purview of change managers working alongside or embedded in projects, and the relative skill sets diverged.

A typical view of the two disciplines can be seen in Figure 2 on page 48.

While the divergence has created clarity in role terms, it is only when the two disciplines are fully integrated as a

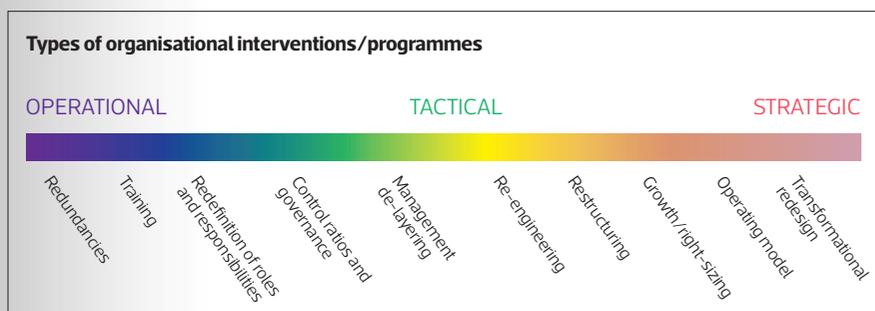


Figure 1: Spectrum illustrating the relative scope and complexity of organisational change



seamless and combined approach that the chances of success really improve. Today, we know that many project and programme managers already accept and embrace the skills of a dedicated change management approach, but many major programmes continue to be delivered without considering and actively influencing the human element of change. It is only if people are willing to implement new systems, processes or ways of working that the attendant change and benefits will be realised.

Organisations that engage and involve employees see 10% higher customer satisfaction and 22% higher profits (Deloitte, Global Human Capital Trends 2016 report)

Transformation occurs when people work differently, and that requires change management to be fully embedded into transformation programmes. In 2017, the UK government assessed its 'transformation' programmes against seven criteria,

including change management and people, and identified a significantly reduced number of programmes that met all the criteria across 12 departments/ministries.

ENTERPRISE CHANGE MANAGEMENT

It is encouraging that the profile and acceptance of the value of change management is increasing across public and private organisations. But when we think about the whole organisation that is transforming, we need these skills to be present in senior leaders, line managers and front-line staff – from the operational business to supporting functions.

Optimising a skill set is not new, and both of our professions have been supporting this direction for years. Conceptually, enterprise change management (ECM) goes beyond the change manager (and project manager) skill set and advocates experimentation and co-creation to generate and own transformation across an organisation.

Change management can have only limited success as a function of a project if it is disconnected from the wider enterprise

ECM capability underpins an organisation's ability to adapt and thrive, and is characterised by the following:

- dedicated job families, role descriptions and a career path to ensure that the ECM skill set has a recognised value within the whole organisation;
- requirement for clear learning and development pathways in support of ECM (the options around good change practice and training have been growing in recent years as the discipline has matured);²
- establishment of change communities, which create opportunities across the enterprise to share ownership of the changes that are under way or on the horizon – practically, communities also support best practice and connections to develop unique insights and co-created solutions that benefit everyone; and
- access to additional specialist support when it is needed, and the autonomy ▶



	Project manager	Change manager
Critical success criteria	Deliver the deliverables and achieve benefits case to specified scope and quality	Ensure the organisation is ready, willing and able to accept change
Purpose/outcome	Project executed to time, with agreed resources and within budget	Ensure stakeholder and business expectations are met
Customer satisfaction	Customer requirements must be understood, as these are the basis for the project to be delivered against	Customers views and needs may change through the life of the project and must be respected
Line reporting	Governance structure (eg programme manager, project/programme board, sponsor etc)	Matrix reporting – project manager and business change leadership/function
Key responsibilities	<ul style="list-style-type: none"> Defining scope Planning and identifying resources Task scheduling and prioritisation Identifying and allocating resources Managing and tracking tasks to completion Resolving problems and issues Project delivery and wrap-up 	<ul style="list-style-type: none"> External project communications Stakeholder management Change readiness Change impact Capability development Training needs Business engagement Business transition Sustaining change

Figure 2: Comparison of project manager and change manager accountability

to engage external specialist support when required – these collaborations work on the same principles as ‘makerspaces’.³

Specialist change collaborations promote curiosity and exploration; encourage peer-to-peer learning; and build a co-creating culture, pro-activeness and sharing tools

CO-EVOLUTION OF P3M AND CM

If we want to see greater transformation success, we need to disseminate our respective capabilities and skills across the entire business – enterprise wide. A good starting point for this is making the relationship between change management (CM) and project, programme and portfolio management (P3M) stronger. In some companies, this is a model that is already being adopted through:

- initially establishing CM as a discipline in its own right – a centre of excellence or

communities of practice – acknowledging that there is a distinct set of CM activities;

- ensuring that CM activities are configured into the transformation life cycle and stage-gate process;
- building CM into assurance reviews and audits so that the human element of change is scrutinised and reported; and
- making efforts to ensure that the traditional project management community and CM communities come together to understand hand-offs, overlap and the value of a truly combined and integrated approach.

Project and change management are both having to evolve. Accelerated by the pressure of unrelenting change and the rise of agile/iterative methodologies, the concept of BAU is becoming obsolete.

There is no BAU – just wave after wave of change that cannot be controlled or managed by a few experts

We must shift our focus beyond defining the detailed ‘what’ of a change

and its specific impact to increasing our people’s ability to anticipate, and be receptive and resilient to the change when it lands. That is why we need an enterprise-wide, structured approach for helping the whole organisation participate in and shape ongoing transformation and change. That is why we need ECM. **■**

1 Vlatka Hlupic, *The Management Shift* (Palgrave Macmillan, 2014)
 2 For example, APMG’s Change Practitioner Course, based on the Change Management Institute’s competence model and *Change Management Body of Knowledge*
 3 A useful infographic on makerspaces is available at www.teach.ceoblognation.com

Enterprise change management (ECM) was developed collaboratively by DEBORAH FEAKINS (Marlowe Consulting) and IRA BLAKE (Uncommon Expertise). To find out more about ECM, and the assessment and tools available that support it, contact Deborah via www.marloweconsulting.com

CASE STUDY

EMBEDDING CHANGE IN A COMPLEX ENVIRONMENT



ARNAB BANERJEE outlines how his team successfully gained engagement on a cross-organisational change programme for London's transport network

As the overarching body for public transport in London, on any average day, Transport for London (TfL) oversees more than 31 million journeys across its network. The need to keep pace with the transport demands of the city drives a significant level of capital investment. Spending on projects and programmes to deliver new infrastructure totals more than £3bn a year.

This capital spend is spread across more than 20 business units and 3,000 direct employees. In January 2012, the TfL commissioner's New Year message set a challenge to create what has become the TfL Pathway: "a common project methodology across TfL... to ensure a clear approach to how we deliver together". The aim was in line with TfL's strategic vision of a 'single, fully integrated authority'.

A NEW VISION FOR PROJECT DELIVERY

TfL Pathway was conceived to answer a number of legacy issues in delivering projects:

- multiple delivery frameworks;
- lack of a common 'project management language';
- not all methodologies fit for purpose;
- varying levels of adherence to methodologies;
- focus on the project level, ignoring the programme portfolio;
- not scalable enough for different types of projects; and

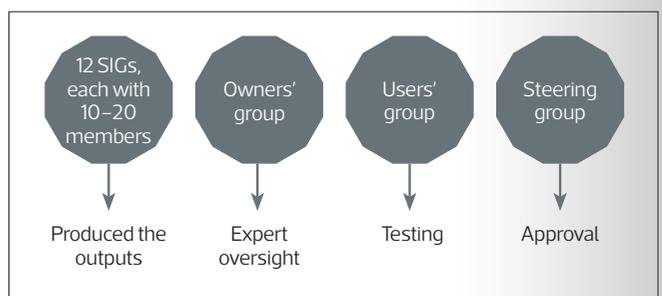


Figure 1: Formal engagement forums – in addition to many one-to-one meetings

- inconsistency, an obstacle to people development and organisational maturity.

The challenge posed to us in the change team was to:

1. understand the disparate methodologies in the businesses;
2. develop the methodology, ensuring full engagement with staff at all levels;
3. ensure effective implementation; and
4. embed ownership in the business.

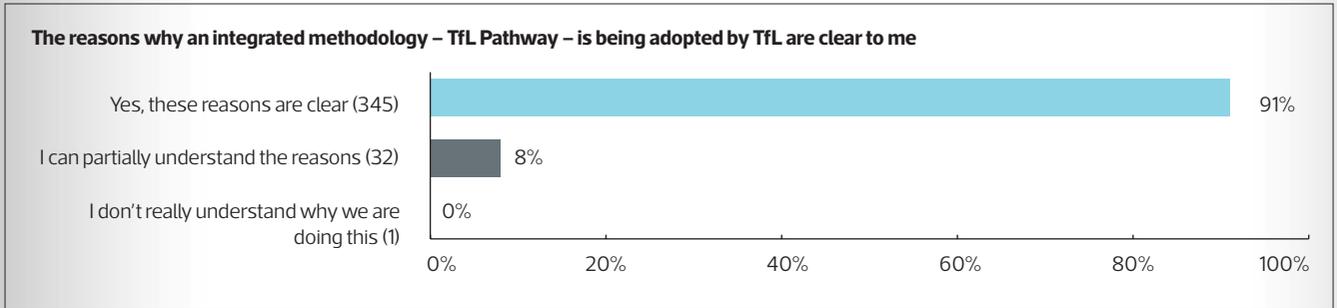


Figure 2: Understanding the need for change (TfL survey, 378 respondents)

This was a business transformation project across a vast organisation with disparate stakeholders.

Here, I will focus on the change work and, in particular, the successful efforts at engagement – the accepted key element for initial and sustainable change.

THE VALUE OF FACE TO FACE

A high-level prerogative – even from the board – is often not enough to carry users along in a change. We had to get close to people. To do this, the change team split itself across two axes. Each became ‘account managers’ to one or more of the business units and one or more of the functions. We became single points of contact for the work and got to know all the key people.

In this way, feedback to us was quick, we could verify and check issues openly, and we rapidly built valuable one-to-one relationships with people who would be affected by and contribute to the work – including being advocates for the change, building credibility through hundreds of face-to-face interactions.

TRUST THE EXPERTS

The quality of the end product in any change – a process or organisational development – is critical to engagement and success. Is what is being proposed logical? Will it be workable? Does it hold together as a concept? And, overall, can it deliver the business objectives?

Readers will be familiar with change programmes that talk about ‘the customer at the core’ or ‘ensure focus while driving efficiency, effectiveness and value’, but the end state and the route to get there seem opaque. Random business-improvement word generators are used with no backup.

For us, two principles drove high engagement, a good end product and effective implementation:

1. The change team did not isolate itself. In this context, it very deliberately put the onus on business and functional experts to work together to come up with the solutions.
2. Customisation was ‘allowed’ from the beginning, taking account of local needs.

Twelve special interest groups (SIGs) covered subjects such as risk, governance, health and safety, life cycles, and commercial – all elements that make up project and programme management.

Each SIG contained 15 to 20 subject-matter experts. In addition, we brought together an owners’ group – custodians of the different methodologies that were being subsumed – a users’ group and a steering group (Figure 1, page 49).

At a generic level, therefore, trusting experts to develop outcomes, customisation to meet local needs and welcoming challenge at all levels were critical to success in providing ownership and appreciating context.

During the development phase, in addition to the formal forums, we met people to explain the project, seek feedback, and understand and incorporate particular requirements. The engagement in this phase helped unimaginably with roll-out and implementation.

Following release, in a period of six weeks, the change team held more than 120 launch briefings in small groups of 10 to 20 across eight locations, covering more than 2,000 staff. Figure 2 shows the high level of understanding of the change, which leads to cooperation.

We signed 24 local implementation plans with sign-off from the local director and a local champion. The plans covered the basics, from briefings and access to material to training and removal of existing material and systems.

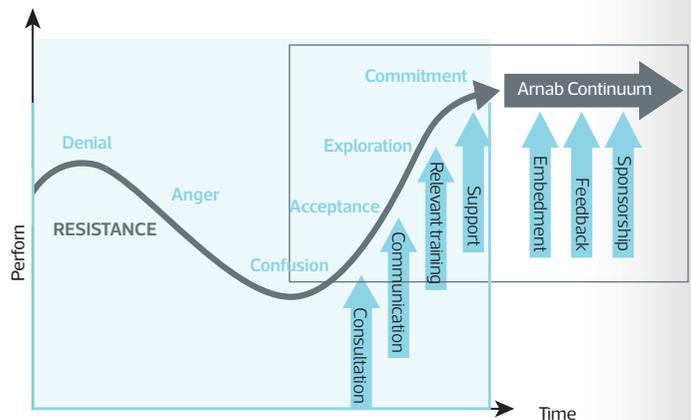


Figure 3: The back end of change – the ‘Arbab Continuum’(!)



Active engagement with >300	Separate meetings: 356	Launch briefings: 120	Local implementation plans: 24
First year meetings: 1,003	Half-day training sessions: 356	Kept the support going	Implemented feedback

Figure 4: Engagement during development (blue, 2012) and post-release (grey, 2013/14)

In the year after release, the change team had 1,003 individual or small-team interactions – more than 80 per month – and more than 300 training sessions. We logged each one and picked up improvement points where appropriate. Board-level purview meant that we presented to the top team of TfL four times over 18 months.

We were a combined project and change team, with everyone realising that ‘change communication’ is best done during the development phase and with users already aware of, and having contributed to, the change by the time it is released.

Too often, the change function is seen as engagement and communications only – the ‘keep people off my back while I go on and deliver what I want’ function. This is simply wrong. If change is not involved in the development of the end product, it then becomes in danger of being a discredited voice box.

SUPPORTING AFTER CHANGE RELEASE

A great question from another change project almost a decade ago was: “Arnab, this is the fourth time in seven years that we have had someone like you stand in a room like this and tell us that we have to change. What is different this time?”

The ‘difference’, then and now, was that we ‘continued the change curve’ (Figure 3):¹

- Embedment meant continued support to those affected by the change up to a year or more after implementation.

- Feedback meant ownership (and continuous improvement) of the change out in the wider business, and not in the central team, through facilitated subject-matter expert groups.
- Sponsorship meant that resources were retained in order to ‘continue the change curve’.

CONCLUSION

At the time of writing, TfL Pathway remains the single recognised methodology for project and programme delivery across TfL – and its position as a core business process has been reinforced in a recent organisational transformation programme. Owned by functional and business owners, it is customised to suit the needs of relevant areas. As a result, it has been chosen by the *Gower Handbook of Programme Management*² as the representative of a transport methodology.

Many aspects played a part in the use and further development of TfL Pathway. These include:

- getting a deep understanding of the context and environment;
- putting a huge amount of effort into engagement;
- trusting the users and experts to play a full part in developing the end product;
- allowing flex to accommodate local needs in design and implementation;
- ensuring business ownership; and
- being wholehearted in dedicating enough time and resource to implementation.

These are common principles of engagement that can be applied in all change projects, regardless of the subject. 

¹ bit.ly/2tPAYto

² Dennis Lock and Reinhard Wagner (eds), *Gower Handbook of Programme Management*, second edition, Routledge (2016)



ARNAB BANERJEE has led strategic and operational change in large and complex organisations comprising the full life cycle, from analysis to case for change, developing the transformation portfolio, implementation and embedment. He is currently a programme manager at Transport for London



CASE STUDY

TRANSFORMING ROYAL MAIL

RICHARD MOOR explains the evolving nature of Royal Mail's portfolio and how he balances conflicting demand to ensure outcomes are achieved

Transformational change was high on the agenda for the government as it sought 'more for less' from public-sector funding. The experience of Royal Mail's transformation over the past decade – from inefficient public-sector monopoly provider to private-sector organisation open to competition – offers lessons on all fronts on how to make such a transformational change programme a success.

Royal Mail is the UK's most trusted letters and parcels delivery company. We provide a six-days-a-week, one-price-goes-anywhere postal service across the UK. Throughout the implementation of our projects and programmes, we continue to collect, process, distribute, and deliver parcels and letters to highly regulated quality-of-service standards. This is akin to redesigning and building a new aircraft while the existing one continues in flight and in commercial service.

Project, programme and portfolio management (P3M) is at the heart of our strategy to be recognised as the best delivery company in the UK and Europe. The current Letters and Network portfolio is made up of more than 270 people covering 102 projects, split into six programmes. We have our share of a total net cash investment of more than £450m per annum as part of a significant transformation of our business, from first collection to the doorstep delivery.

This transformation was only made possible by our commitment to attaining and utilising APM-led project management professionalism, equipping our project management professionals to successfully

deliver our projects and programmes. Over the past seven years we have delivered more than £1bn in recurring annual benefits through modernising Royal Mail's operation, which is – as far as we are aware – without peer in the UK.

There are many competing factors that need to be pieced together to ensure the success of the portfolio. Rather like a jigsaw puzzle, having a good understanding of the desired outcome is key, recognising that this picture is a constantly changing phenomenon. There is but one certainty in project management, that of change. The core pieces of the jigsaw tend to be quite uniform, and can be broadly categorised as customer, employee, shareholder, market and, in our case, regulation. The jigsaw then becomes three-dimensional when you build in short-term expectations against longer-term strategic goals, industrial relations, resources and funding.

PORTFOLIO PRIORITISATION

Prioritising the change activity is fundamental to the success of Royal Mail's transformation journey. Prioritisation can no longer be undertaken on an annual planning cycle, but is reviewed on a quarterly basis, recognising the constant change in the market, project progress against the plan and the available investment. Once demand has been reviewed and challenged, change is categorised as follows:

- **regulatory;**
- **cost of doing business – those critical activities;**
- **in flight (mature projects);**
- **discretionary new (prioritised);**

- **discretionary new (prioritised level two); and**
- **discretionary new (de-prioritised).**

Although in-flight projects form part of the prioritisation exercise, unless the organisation is prepared to stop these projects, budget is just allocated and we move on to where there are real choices to be made. The shaping part of the prioritisation is now carried out – determining which of these initiatives is most closely aligned to delivering the business objectives. We prioritise to two levels. The first tends to be those already in design where benefits have a greater level of certainty and costs known. The second is for new initiatives that require full scoping and carry higher levels of risk.

To assist the prioritisation process, the project assessment tool (PAT) was created. The PAT is a simple guide that looks at the level of certainty of benefit success (financial and non-financial) against risk and proposition. Projects are classified as gold, silver or bronze. A bronze project requires the same professional challenge as any other, but, given it is deemed more likely to succeed, the level of governance and control is reduced, enabling the project to succeed (or fail fast). With gold projects, we anticipate significant challenges; through using the 'governance is our friend' mantra, we can help the project manager steer the activity to success.

Once we have a recommended list of projects, the proposal iterates through the various stakeholders and is finally signed off by the managing director. Good stakeholder management and careful communication help avoid any late surprises. The demand,

RATHER LIKE A JIGSAW PUZZLE, HAVING A GOOD UNDERSTANDING OF THE DESIRED OUTCOME IS KEY, RECOGNISING THAT THIS PICTURE IS A CONSTANTLY CHANGING PHENOMENON

- approve, sign off and present their project post-implementation report to the executive and board.

PEOPLE DEVELOPMENT

We see the attainment of the industry-leading APM qualifications and Registered Project Professional accreditation as key building blocks in career development. These have been at the heart of our recent capability development assessment of the 160 leading P3M practitioners, which assessed their experiences against the APM competences and outputted with refreshed personal-development plans against this framework. They, and every other member of our P3M community, have an annual 'learning voucher', promising a minimum of 40 hours of development per annum, and the maintenance of a CPD log and personal-development plan, which is discussed and progressed in monthly one-to-one discussions. Outside this and leading towards it, we encourage APM participation and qualification.

JOURNEY ASSURANCE

The journey is certainly not over, and every day is a learning experience. To embed 'sticky change', it is really important to think through the personal impact. The common mantra across the portfolio is 'so what does this change mean to me?' While learning to drive a car, you certainly couldn't pass your practical by reading the *Highway Code*, and the same can be said of implementing change. We are focused on developing different toolboxes to reflect the different environments that we operate in, be they customer or employee led. The principle of journey assurance is to tailor the deployment approach to the specific unit, making the journey feel better, and thereby driving high levels of success.

A FINAL WORD

The balanced portfolio aligns outcomes to strategic goals, and the road map to those goals will vary. Rather like a satellite navigation system recalculates when it hits traffic, so does the portfolio manager to ensure the business objective is met. Instrumental, at least in my experience, are a supportive sponsor; an engaged, motivated and inspired team; and recognition that every change is different. Pull together all of these pieces and align to an appropriate governance mechanism and, although it can't be assured, success is at least more predictable. 

RICHARD MOOR is head of the Letters and Network portfolio at Royal Mail

however, always exceeds the supply of funds. Once the plan has been signed off, the next challenge is to ensure the change is effectively managed where priorities change. A quarterly reallocation process realigns that priority. It recognises those projects with greater flex on spend and enables other initiatives to be brought forward, should funding be available.

DEPLOYING THE PLAN

Bringing this plan to life is critical to portfolio success. Royal Mail UK Parcels, International & Letters employs around 142,000 people at more than 1,300 locations. Understanding the impact of a multifaceted portfolio on our people is key. To provide both robust grip and early, easy-to-see visibility of planned change (and to facilitate cross-programme management of multiple concurrent flight paths), we have built a change-loading tool that is accessible to the project community and front-line colleagues alike. It establishes a clear and shared view for all stakeholders of individual items of change occurring on a weekly basis, and encompassing the full Letters and Network portfolio across the national business estate. The tool is simple and intuitive; for example, changes to health and safety legal standards that involve management (such as the *Construction (Design Management) Regulations 2015*) appear in high-vis orange.

This tool embeds the principles of rigorous change control within the project community, and projects the outputs as

an effective solution for evaluation, and either approval or deferment. Day-to-day decisions can be made using this tool to ensure the impact of change is effectively managed and a vision for every unit can be pulled together.

THE ROLE OF SPONSORS

Key to our success is defining sponsorship. Only directors can be sponsors, and sponsorship is usually given to the director in whose area of accountability the changes are to be made so they can leverage change through leadership and coordination. Sponsors chair the programme boards to which their projects report progress, and resolve risks and issues. They also present their business cases and post-implementation reviews personally to governance bodies. We also provide training for new sponsors based on a clear definition of the role and what it means in terms of project governance in simple and clear language, as below. Sponsors should:

- resolve major issues at point of escalation if required;
- regularly attend the operational programme board;
- chair their programme board as required;
- coach and develop the members of the project team;
- sign off all proposed deviations from authority (time, cost, quality, scope and benefit) via a formal request for change or re-authority process;
- own the check-and-go process (if required) prior to project launch, ensuring resolution of any pre-launch issues or found gaps; and

Developing ‘third wave’ project leaders

Why BAE Systems is collaborating with Alliance Manchester Business School to develop the leadership competencies of its project directors

The project management profession has evolved in three waves since the 1940s. In the first wave (1940s–1960s), project management competencies were focused on the application of tools and techniques for project delivery, predominantly in the US aerospace and defence industry, based on concepts and tools developed earlier for the First World War.

The second wave (1970s–1990s) was characterised by increasing the scope of project management competencies to cover more holistic integration – for example, the management of the full project life cycle with more emphasis on shaping projects in their definition to align with business strategy, and the integration of other disciplines (eg commercial, human resources and procurement). This second wave also included the establishment of professional bodies and qualifications for project management, and the expansion of the tools and techniques from the first wave into other industries, such as construction, oil and gas, and IT.

In the third wave (2000s–present), project management has started to become a profession; projects have become prevalent in organising work and managing change in organisations (‘projectification’). We have seen more emphasis on project governance during this phase, including stakeholder involvement and contract management. There has been a greater push into the ‘front end’ of the project life cycle and the growth of agile. We are also starting to see distinctions in approaches for project owners and project suppliers. Project management competencies now embrace project leadership and people-focused soft skills.

MEETING HIGHER DEMAND

As the provider of some of the most advanced technology-led defence, aerospace and security solutions in the world, BAE Systems has identified that its business environment is becoming more difficult. Customers are demanding higher levels of project performance in an increasingly challenging and more competitive marketplace. This is resulting in projects becoming more complex, and exhibiting more risk and uncertainty. Development in the company’s project leadership capability is seen as the key response to this complexity.

To address these challenges in winning and delivering large-scale, complex projects, BAE Systems decided to collaborate with Alliance Manchester Business School, part of the University of Manchester, in the creation of a project director learning and development intervention. BAE Systems’ existing courses focused predominantly on technical project management and general leadership skills, and did not adequately address the higher-level

project leadership behavioural competencies associated with the management of complex projects, programmes and portfolios.

The resulting executive education programme, Leading Complex Projects, Programmes and Portfolios (LCP3), is aimed at helping experienced BAE Systems practitioners to develop the project leadership competencies necessary to deal with growing project complexity, and creating an enduring improvement in the company’s global capability to win and deliver successful projects.

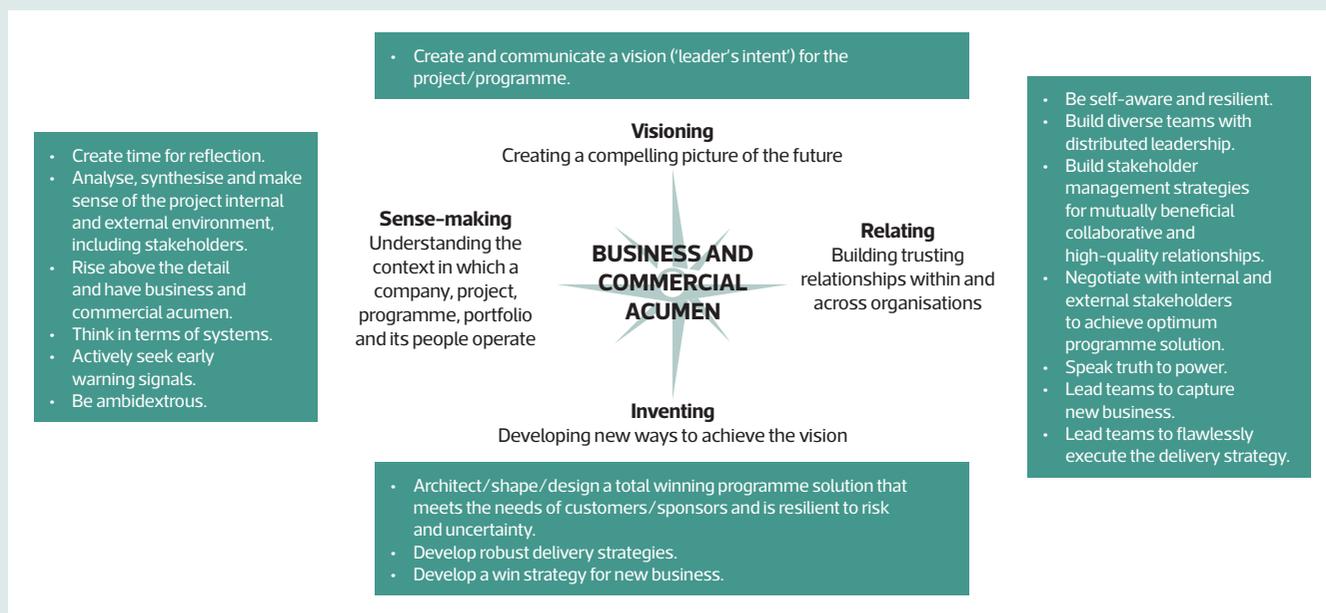
The 18-month core programme (24 months for a postgraduate certificate) is based on BAE Systems’ lessons learned from real-life programmes, underpinned by the academic concepts and research. The underlying learning approach of the programme is based around the Manchester Method, a practical, situation-based way of executive education developed by Alliance Manchester Business School in the 1960s, and refined over many years of designing and delivering programmes.

The project directors hone their skills during a series of highly practical competency masterclasses, and then apply what they have learnt directly to issues and challenges in the workplace through reflective practice assignments and peer-assisted action learning. This ensures that their learning is targeted, relevant and, above all, applicable to their current and future projects.

Six themes were identified to underpin the programme and formed the basis for the masterclass session topics – all competencies were associated with high-level behavioural aspects, with common themes of relationship development, managing complexity, and personal capability in reflective thinking and decision-making:

1. managing complexity, risk and uncertainty in complex projects, programmes and portfolios;
2. understanding yourself as a leader, and the impact of your behaviour on others in a project team environment focused on results;
3. engaging stakeholders for mutually beneficial collaborative relationships outside the project team;
4. driving business growth in winning new business through collaborative working with new and existing customers;
5. effective design and development of project/programme/portfolio execution strategies and solutions; and
6. effective leadership of project/programme/portfolio execution.

One leadership concept in particular has resonated with the project directors participating in the programme – the Model of Distributed Leadership (also known as the Sloan Leadership Model). This is a capability framework developed by four academics at the Massachusetts Institute of Technology Sloan School of Management.¹



The Sloan Leadership Model adapted for BAE Systems project leaders – adapted from Ancona et al (2007)

As LCP3 has evolved, this model has become an important, underpinning concept of the programme (see diagram above). It acknowledges that no one can excel at all aspects of leadership, which comes as a great relief to project directors who feel compelled to be the 'leader as hero'; each project leader needs a supporting team to complement their strengths and weaknesses.

The model presents four competencies that are at the core of successful leadership, particularly in times of uncertainty and change:

1. **sense-making:** making sense of the environment and context that the project leader is operating in – creating a mental map of the environment and revising this map as things change;
2. **visioning:** creating and sharing a compelling vision of the future – the map of what could be;
3. **relating:** connecting and communicating directly and honestly with project stakeholders and understanding their values and needs – generating trust through relationships; and
4. **inventing:** designing and developing a total programme solution that meets the needs of stakeholders and delivers the vision.

For LCP3, the design team has added the fifth competence of 'business and commercial acumen' to reflect that a third-wave project leader needs to develop a 'gut feel' based on experience within the business context they are operating in. They also need to be able to synthesise information from multiple sources, rise above the detail, and make decisions that make commercial and business sense.

CULTURE CHANGE

The feedback received on the LCP3 programme from participants and senior leaders is that the concepts being taught are resonating with the needs of both the individual project directors and their home business units, and the concepts and language of the programme are being used to improve the business. There are the first signs of a genuine culture change and a strong sense of community growing among the programme participants.

In particular, the following improvements have been seen:

- acknowledgement that the project leader can't do it all and needs appropriate skills and support from team members;

- increased confidence in self and team leadership abilities;
- recognition of the benefit of stepping back to reflect and plan;
- improved understanding of stakeholder interests and influence;
- improved customer intimacy and understanding of customer needs;
- awareness of the need to design a project before planning it;
- increased emphasis on the early stages of project responses;
- improved understanding of project risk;
- improved understanding of the unintended consequences of change; and
- recognition of the need to have honest conversations for the benefit of the project and business ('speaking truth to power').

These improvements can all be mapped back to the Sloan Leadership Model, which we have found to be an elegant mechanism for thinking about the third wave of project management. The improvements are subtle, and any one in isolation would have limited impact. However, taken together and achieved across a project leadership community of more than 400 people, with the multiplying effect achieved from interaction with the thousands of people that this community engages with, it is expected that these improvements will have an enduring positive impact on winning and delivering projects, programmes and portfolios across the company. 

¹ Ancona, D, Malone, T W, Orlikowski, W J, Senge, P M (2007). In praise of the incomplete leader. *Harvard Business Review*, 85(2): 92–100.



STUART FORSYTH is head of project management at BAE Systems and honorary professor at Alliance Manchester Business School
DR CARL GAVIN is senior lecturer in project management and programme director at Alliance Manchester Business School

Why you need hard data to manage the soft stuff

Collecting and monitoring behavioural data from your team will help smooth the path to project success, argues **TONY LLEWELLYN**

It is widely accepted that complex projects are more likely to succeed if attention is paid to establishing and maintaining a collaborative team. As the project goes through periods of pressure, however, behaviours start to shift as people react to the events that surround them. The environment can slip from collaborative to dysfunctional without you being aware of the problem. The answer, therefore, is to monitor those factors that are likely to affect the behaviours in your team so that you have an early warning of potential problems and can take steps before an issue becomes a crisis.

Collecting data and turning it into information is a well-understood project management function. Most project managers are familiar with risk management, key performance indicators (KPIs) and balanced scorecards. The old adage 'what gets measured gets done' is as applicable to behaviours as it is any other component of so-called 'hard' data. The problem for professionals trained in the technical process of project delivery is that collaboration appears to be an inexact science.

Every group of individuals assembled to create a team will think, behave and interact with others in a unique way. Consequently, it is easy to arrive at the conclusion that human behaviours are too 'soft' to be of use to a management team accustomed to making decisions based on hard facts. However, our behaviours typically show a level of consistency that allows them to be monitored. The technique is not to try to measure behaviours themselves, but instead to look at factors that are likely to cause a change in behaviours.

MEASURING BEHAVIOURAL NORMS

When measuring any activity, it is worth understanding what you are trying to achieve. Gathering and processing data takes time and energy, so it is worth being clear what you will do with the output. The day-to-day behaviours you see in your team are likely to be a reaction to the circumstances surrounding them, and the extent to which they feel psychologically safe.

A METHODOLOGY FOR SUCCESS

Building a process for measuring behavioural key performance indicators need not be complicated. Here are some tips that may help:

- 1** Before you start, get buy-in to the idea from the team. The larger the project, the more important this early buy-in is. Once you have gained the team's agreement in principle, it is much harder to argue against the practical need to take time to provide the data, and then receive the results.
- 2** Decide on the mechanism for collecting the data. For small teams of 10 or fewer people, this might be done using a spreadsheet. As the team grows, you could use an online survey tool such as SurveyMonkey. For larger project teams (25+), it is worth exploring proprietary feedback systems that can automatically collate data, making it easier to create a management report.
- 3** Decide on the period between each exercise. On short but intense projects, exercises might be weekly. Larger projects may opt for monthly or six-weekly intervals. The point is to collect data that allows you to see trends.
- 4** Agree what questions to ask. A simple method is to ask each member the extent to which they agree with a number of statements. You can make these very specific, but there are a number of areas that are consistently found to impact on team performance. Some examples include:
 - Clear strategy: 'The strategy for delivering this project is absolutely clear to me.'
 - Trust: 'The culture of the team encourages open admission of weaknesses and mistakes.'
 - Respect: 'I feel that team members consistently treat each other respectfully.'
 - Responsibilities: 'I am clear on each team member's roles and responsibilities.'
- No blame culture: 'I see a culture in the team of trying to learn from problems rather than apportion blame.'
- Flexibility: 'I often see examples of flexibility in the team's approach.'
- Meetings: 'All of our meetings are compelling, well structured and productive.'
- 5** Decide how to collect and process the data. There is an advantage in finding an independent individual to sort the information and produce the report. This might incur some additional cost, but the safer the team feels about raising concerns, the better the quality of information that is likely to be fed back.
- 6** Agree when and how to bring the condensed information back to the team to discuss and, where necessary, take action.



COLLECTING INFORMATION ON THE ISSUES THAT AFFECT TEAM BEHAVIOURS PROVIDES TEAM MEMBERS WITH A FORMAL OUTLET, WHICH IS NOT OTHERWISE EASILY AVAILABLE

Ideally, your team will be working together as an open, flexible, trusting and resilient unit. You should, therefore, try to monitor those factors known to heavily influence the perception of the team environment. You may feel that perception is an imprecise measure, but actually this is the point of the exercise. In any given situation, a group of people may look at the facts presented to them, and each individual may come to a different conclusion as to what the facts mean. By asking a series of questions on a regular basis, you can get feedback on the resilience of the team and the extent to which everyone is 'on the same page'.

DON'T SHOOT THE MESSENGER

Technical people are typically more comfortable dealing with technical issues, and would generally prefer not to have to deal with the challenges presented by people and their messy emotions. The problem with behavioural data is that you may not like what you are being told. Feedback that is critical of the management team is not always welcome. The team's instinctive reaction to unfavourable news may be to try to ignore it, dispute its credibility or blame whoever produced the report.

Much depends on your perspective. Would you prefer to know that there are issues brewing before they become problematic, or just deal with the issues when they blow up into a crisis? Rationally, most project managers would like advance warning, but history shows that we quickly become defensive when we feel threatened by criticism. It may, therefore, take a bit of effort to ensure that the team moves beyond its initial instinctive reactions, and recognises the

value that critical data has in helping the team adjust its behaviours and regain cohesion.

There is always a potential danger that the team will suffer from feedback fatigue. Collecting information on the issues that affect team behaviours provides team members with a formal outlet, which is not otherwise easily available. If they feel their input is ignored, they are less likely to contribute in future. If you are going to ask your team members for their thoughts and observations, you must also be prepared to take action when the issues are important.

A final recommendation is to be patient and stick with the process. It typically takes three to four iterations before the team gets used to the data-collecting and reporting process. The data becomes useful when you aggregate the statistics and can follow trends. If your scores in any one area are dropping even by a small amount over three iterations, you have probably got an issue that needs exploring.

A WORTHWHILE PURSUIT?

Collecting and managing behavioural data is a time-consuming process. While parts of it can be automated or even outsourced, as project leader, you must still pay attention to what the data is telling you. Traditional KPIs, such as programme and cost, only tell you a part of the story. Adding the behavioural dimension will give a more complete picture of what is really happening.

The process is therefore well worth the effort. There is a correlation between project failure and dysfunctional team behaviours. Taking steps to monitor and improve your team's ability to collaborate can only improve its chances of success. 



TONY LLEWELLYN is a collaboration director at ResoLex and a visiting lecturer at the University of Westminster. His book *Performance Coaching for Complex Projects* is published by Routledge



Six key steps to... decision-based stakeholder engagement

RICHARD PEEL offers a practical six-step guide to effective stakeholder engagement for project success

So often we start stakeholder engagement from the ‘wrong end’ – ie ‘identify anyone who is affected by or interested in the project’.

We’ve heard that a thousand times. But, in my experience, what generally happens is that we end up with long lists of ‘everyone and their dog’, and even after the usual analysis we realise that we can’t possibly engage with so many different groups of people.

Too often, too much data swamps our good intentions, and stakeholder maps are drawn and consigned to the bottom

of a drawer, while people just get on and do their best.

THE SOLUTION

Try asking this instead: ‘What decisions do I need from stakeholders for my project to succeed?’ In short, start with the end in mind – what specifically do we want our stakeholders to do?

Typical decisions that are critical to the success of our project include:

- **Resource allocation – usually funding and people; and, depending on the type of project, perhaps accommodation, cranes,**

power generators, etc. Will we be given them? When?

- **Regulatory/statutory-body approval – eg planning permission, access to infrastructure networks. Will they be timely?**
- **Suppliers’ decisions to bid for work – will we attract the right companies?**

Here, in navigating these decisions, is the end purpose of our engagement with stakeholders. This gives us a sharp, clear focus for what we do next.

So, let’s look at the six key steps to decision-based stakeholder engagement.

1 IDENTIFY THE KEY DECISIONS REQUIRED TO SECURE THE SUCCESS OF THE PROJECT

We know that these key decisions are the things that really matter to us, because we've already documented them. They are represented as:

- milestones in our plan – 'design approval'; 'receive supplier bids';
- causes in our risk log – 'specialist engineering resource not made available'; 'regulatory approval delayed';
- decisions in project calendars – 'go/no-go gate for contract let'; and
- assumptions – 'project accommodation and computing is available'.

Tip: the timing of the decision is often as important as the outcome; delay is typically what kills a project.

2 IDENTIFY THE PEOPLE WHO WILL MAKE THE DECISIONS

Here we need to avoid the trap of just identifying the organisations, or even the roles. It is people that make decisions, with their own unique personal history, view of the world and ways of operating. Engage with the person, not the role or the organisation.

We might think that we know what concerns a finance director and what questions they will ask. But what if that person was previously a plant manager? What if that person has had their 'fingers burnt' by a project like this one before? We need to work with the individual.

3 IDENTIFY THEIR KEY ADVISERS

Decision-makers are usually senior people. Some of these people will give our decision personal attention, and some will be up to speed on all the detail required. Others will rely on trusted advisers to make the evaluations that they will then act upon.

We need to understand who has influence and engage with them also.

When decisions are being taken, remember the power outside the room too.

4 UNDERSTAND STAKEHOLDER CONCERNS

As a project manager, we have worked long and hard with our team to come up with a solution and an approach. We simply don't have the time to go back over

things if we are going to hit the deadlines and stay within budget. Consequently, we sometimes see the people raising concerns as 'blockers'.

But wait a minute. What if they do have an insight that we missed? What if we don't have all the answers? Early engagement gives us the opportunity to gain their insights without delaying the project.

There are no blockers, just people providing advice for free. They might be saving us a whole lot of work further down the line.

This is why the often-used approach of categorising people as 'supporters' and 'blockers' really does not help. All too easily we can fall into the trap of engaging with those that agree with us and neglecting the very people who could help us by bringing an alternative view. Hands up those who can honestly say they don't avoid the 'blockers' – it's better to view them as 'critical friends'.

The problem with not talking to people is that you end up making assumptions about what they think. The only way you really know what people think is by asking them directly and actively listening. So, try the following approach:

- Meet your 'critical friend' where they can give you their honest view (so possibly not in a group; a one-to-one generally works best).
- Ask them what their concerns are around the specific decision.
- Play back the concerns to them in the meeting so that they can correct your understanding if you haven't got it right.
- Capture their solutions to the concerns as well (even though you may propose an alternative solution later on).
- Follow up with an informal note after the meeting to restate what you understood as their concerns and proposed solutions.
- Log the stakeholder concerns in a project log. ▶

ALL TOO EASILY WE CAN FALL INTO THE TRAP OF ENGAGING WITH THOSE THAT AGREE WITH US AND NEGLECTING THE VERY PEOPLE WHO COULD HELP US





IF WHAT GETS
MEASURED GETS
DONE, WHY AREN'T
WE MEASURING
STAKEHOLDER
ENGAGEMENT?

It may sound very formal and structured, but if we manage other aspects of a project, such as risk, change and issues, in this way, it does make sense to manage our stakeholder engagement equally well.

5 ADDRESS THE CONCERNS

Now we have a log of concerns, we can start putting in place actions and action owners to address them. It is sensible to go back to the stakeholder and agree with them that the actions will indeed address their concerns. We can't make assumptions.

Examples of types of action we might take are to:

- provide requested information;
- brief a trusted adviser; and
- make a change to our plans.

6 CHECK ENGAGEMENT

Finally, we need to know whether we are on track with our stakeholder engagement. Will we get the decision we need when we need it? We measure delivery progress, risks, benefit realisation and costs. If what gets measured gets done, why aren't we measuring stakeholder engagement?

A good approach is to ask the stakeholder: 'If you were taking the decision today, how likely would you be to say "yes" on a scale of one to five?' That way, you are making the question very specifically about the decision in hand.

Ask this question as a prompt to understand their concerns in step four. If they score less than 'five', ask them what it would take to move them up to a 'five'. Again, this forces a discussion about specifics.

After taking action to address the concerns, ask the question again. If the stakeholder scores less than 'five', we are back into step four and understanding their concerns again.

In conclusion, we start our stakeholder engagement at the 'right end' by understanding what we need our stakeholders to do. We then work with them to get them to the place where they can do it. 



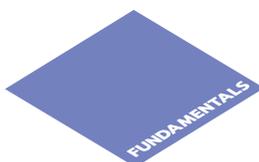
RICHARD PEEL is a project management professional with more than 25 years' experience, working as a coach and consultant





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**APM
QUALIFICATIONS**



“ I have several years’ experience as a project manager, but often feel that I am not good enough. My projects are becoming more complex, and I fear that something will go wrong and I will somehow be found out. What should I do? ”

Thank you for your openness about how you are feeling. Running a project can be very stressful, and it is not uncommon for project managers to fear that their projects will fail. Being attentive and aware of risks is a natural response, but it is unhealthy to be concerned to the point where it affects your confidence. I will give you my view on how you can strengthen your belief in yourself and your project.

REVIEW THE PROJECT

On an external level, it is important that your project is properly defined, you are using the team in the right way and your project plans are adequate. Make sure that you run regular risk management workshops where, together with the team, you share your concerns and put in place mitigating actions. If you are still worried that you have missed something, ask one of your peers to review your artefacts and sit in on some of your meetings.

You might also benefit from regular conversations with a mentor. Choose someone inside your organisation who has more experience than you, and who comes across as calm and measured. A mentor will listen to your concerns and give you advice in areas where you are unsure how to progress.

REALITY CHECK

As much as you can make improvements to the way you set up and run your project, the real work in improving your self-confidence is internal. Doubt in our own abilities is rooted in how we think and feel about ourselves. In your case, I suspect you are judging yourself unfairly. It would be helpful to ask a few of your managers, peers and team members for feedback about what they feel you are doing



SUSANNE MADSEN is an internationally recognised project leadership coach, trainer and consultant. She is the author of *The Project Management Coaching Workbook* and *The Power of Project Leadership*. For more information, see www.susannemadsen.com



really well. Choose people whose opinion you respect. Also ask them to tell you one thing they believe you could improve on. That should give you a good reality check and show you that, although you are not perfect (none of us are), your skills as a project manager are solid. Where there is room for improvement, make arrangements to read books, go on a course or work with a coach to fill the gap.

FEEL YOUR STRENGTHS

External feedback and validation is a good starting point for reminding you what you do well, but you also need to do the internal work to improve your self-belief. Create a list of things you feel that you are doing well. Write down anything that comes to mind, small items as well as big ones. Make a note of your past achievements. Don't just think about them – feel them in your body as you review all the projects you have delivered. Acknowledging your strengths and achievements is the first step to lighting up your internal sun.

You can further strengthen the glow inside you by reminding yourself of your strengths at the start of every day. Create a morning ritual before you leave the house. You can either sit in stillness for a moment or read out some affirmations. It doesn't matter what you do as long as you feel strong in your body.

My final thought is that you are currently operating at the edge of your comfort zone. This can be a good thing, because it means that you are learning. If you were totally comfortable in your role, you would not be growing. No one will ever be in total control of a project, and that is OK. Our job is to strengthen the project and our internal sun, and, thereafter, to embrace uncertainty. ☑

ACKNOWLEDGING YOUR STRENGTHS AND ACHIEVEMENTS
IS THE FIRST STEP TO LIGHTING UP YOUR INTERNAL SUN

DO YOU HAVE A QUESTION FOR SUSANNE TO ANSWER? EMAIL HER AT MAIL@SUSANNEMADSEN.COM

The A to Z of project management

BRIAN WERNHAM offers a quick guide to some common project management terms – this issue, those starting with ‘B’

BALANCED PORTFOLIOS

Portfolio management is about achieving balance: balancing the organisation’s long-term strategic objectives with the urgent needs of ‘business as usual’ operations; and balancing the need for fast progress in specific areas with the need for a coherent whole. It’s about finding the ‘art of the possible’, which is always subject to the ‘basket of constraints’ unique to every industry and every organisation.

One can view the portfolio life cycle as having three activities. First, a portfolio definition board agrees upon a ‘baseline’ of change initiatives. Second, a portfolio performance board tracks the change initiatives. And third, it recommends adjustments to the portfolio definition board.

These adjustments are necessary to keep the portfolio in balance. For example, new change initiatives may be needed. Existing change initiatives (programmes, projects or lean rapid improvement events) may need to be reshaped or stopped. There may be the recognition that several disjointed projects focused solely on producing outputs may need to be assimilated into a coherent programme that will coordinate their outputs into a more coherent capability and produce better business outcomes. *Reference: APM Body of Knowledge 6th edition, section 1.1.3 ‘Portfolio Management’*

BREAKDOWN STRUCTURES

It is too easy to fall into the trap of planning a project based on the most obvious activities that come to mind. Then, part of the way through the project, one realises that things have been forgotten, costs are being rolled up inappropriately and the project organisation is not suitable for the work that has to be done.

Breakdown structures are a tool for ensuring that things are not left out of the plans. First, a product breakdown structure (PBS) is prepared, which shows how the deliverables from a project ‘break down’ into constituent components that together make up the scope for the project outputs.



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

Then, a work breakdown structure (WBS) can be drawn up that shows how the activities will be organised to produce those products. Often, the WBS will look very different from the PBS because certain specialist equipment or people may carry out a similar development activity to produce different elements of the PBS. The project organisation will be represented by an organisational breakdown structure (OBS), and, together with a cost breakdown structure (CBS), the project manager will then be able to analyse spend by product, type of activity and phase of the project.

If there are several suppliers involved, then a package breakdown structure (PaBS) can be used to aggregate the products and/or activities into ‘work packages’ for phased delivery. *Reference: APM Body of Knowledge 6th edition, sections 3.1.5 ‘Project Management’, 3.4.1 ‘Cost Management’ and 3.7.3 ‘Procurement’*

BUFFERS

‘Critical chain’ management introduces ‘buffers’ at portfolio, programme and project levels. This makes contingency planning more proactive by bringing control of the deployment of resource contingency to the portfolio board, the tracking of the burn-of-time contingency to programme managers, and the allocation of countermeasures to critical path risks to the project managers.

Portfolios hold a buffer of strategic resource contingency rather than being held (and perhaps hidden) at lower levels. Like Wellington at Waterloo, reserve troops are held by the general until well into the battle – to be deployed when strategically needed by a central ‘controlling mind’, rather than frittered away by the captains of individual regiments.

Programmes hold buffers of time contingency at the end of each project. Each project manager must plan on the basis of ‘best outcomes’ for each project activity, and then show a large time buffer (of up to, say, 25 per cent) as a single ‘buffer activity’ to give time contingency before each promised project delivery.

Projects hold ‘feeding buffers’ to ensure that tasks that feed into the internal project ‘critical path’ can start early, so that any risk of delay to delivery is eliminated. In contrast, tasks that do not feed into the critical path are planned ‘as late as possible’ to eliminate premature burn of budget.

Further reading: APM Body of Knowledge 6th edition, section 3.3.1 ‘Resources’

IT IS TOO EASY TO FALL INTO THE TRAP OF PLANNING A PROJECT BASED ON THE MOST OBVIOUS ACTIVITIES THAT COME TO MIND

Flight fantastic

Drones have navigated media brickbats to become vital assets for project managers.

MATT PACKER explains how they are boosting efficiency, cutting costs and flying high on green standards

If you google 'drones' – known more formally as unmanned aerial vehicles (UAVs) – you will most likely come away thinking that such devices are pests. Drones have undeniably had their fair share of scrapes. In January, a drone collision badly damaged the nose cone of a Boeing 737 that was coming to land in Mozambique. In February, a US court handed a 30-day jail sentence to the boss of a Seattle-based aerial photography firm after one of his drones cut out mid-flight and dropped onto a parade, knocking a woman unconscious.

These are just two of many incidents that the media has seized upon to portray drones as a problem. But significant evidence is stacking up to suggest that, in the right hands, UAVs are a game-changing solution, particularly for project management. The first major piece of research to explore drones' links with fields such as infrastructure, agriculture and transport was PwC's 2016 study *Clarity From Above*. It noted that the global market for 'drone-powered solutions' in these sectors and others could be worth as much as \$127bn, with capital projects and land surveys now benefiting from drones' knack for blending pin-sharp observation with the rigour of big data.

But that's not all. Architect Mark Dytham, who uses a type of UAV called a quadcopter to survey construction sites, believes that, when we eventually use drones for routine transport purposes, they will reshape our view of the urban environment.

"In the future," he says, "you'll experience architecture from drones. They will change the way architecture is perceived. It will be possible to see buildings from above. We'll cease to be ground-dwelling creatures; we'll see things in a vertical dimension."

ACCESS ALL AREAS

Mat Kellett, mobile-mapping and UAV product manager at Topcon Positioning, offers insight on drones' powerful capabilities and efficiency gains. His firm supplies the Sirius Pro UAV to a range of clients.

"UAVs can bring a number of benefits to construction projects," he says, "enhancing the data-collection process by quickly providing complete visual capture of a given area. A fixed-wing system such as ours can cover up to 1km² in an hour – something that would take up to two days with traditional surveying methods. UAVs can also reach areas that tend to be difficult to survey, carrying out internal-tank or live-rail inspections, which saves time and improves safety."

In 2015, the Sirius Pro helped land-surveying firm Caintech conduct an aerial sweep of the failed flood defences in Cumbrian town Cockermouth, after flooding had devastated the beleaguered spot for the fourth time since 2005.

"A full survey was required to analyse the area and provide flood-extent mapping

for prevention," Kellett says. "As Caintech used a UAV rather than traditional surveying methods, the data was available in just 36 hours, surpassing the manual average of five to six weeks."

Ecological consultancy Thomson Ecology also works with the project management community on UAV ventures.

"Our team has used UAVs to provide project managers with aerial photography services for both inspection purposes and mapping sites," says bid manager Ross Johnson. "For example, they have used our UAVs to inspect inaccessible parts of large structures, such as rail viaducts and large buildings, to assess their potential for supporting bats, a protected species. Using UAVs in this way means that such sites don't have to be accessed manually, which would be tricky, expensive and time-consuming."

He adds: "Our UAV photography has been used to map large areas of habitat on a range of sites, such as Filby Broad in Norfolk and Knepp Castle Estate, as part of its rewilding project. This has enabled the team to accurately map the habitats on-site, and to compare the results to past imagery, so the client can see what kind of structural changes have occurred over time. Our experts have also produced 3D models from the imagery using photogrammetry, which enables ecologists to examine the 3D structure of features such as vegetation. The high level of detail is far superior to satellite imagery."

Kellett and Johnson are also keen to stress that their firms operate UAVs under a regulated framework set down by the Civil Aviation Authority (CAA). Topcon Positioning works alongside CAA-approved training organisation Resource Group, while Thomson Ecology has a fully trained chief pilot and CAA permit for commercial operations.

▶▶

"UAVs can bring a number of benefits to construction projects, enhancing the data-collection process by quickly providing complete visual capture of a given area. UAVs can also reach areas that tend to be difficult to survey"



DRONE SWEET DRONE

Four examples of how unmanned aerial vehicles (UAVs) are changing the world

FINGER ON THE PULSE

Technology company Zipline has teamed up with the Rwandan government to fly blood, plasma and coagulants to the nation's rural hospitals via a network of UAVs. The initiative serves 21 hospitals across Rwanda.

EYES OF A HAWK

The Police Service of Northern Ireland is using drones to stake out potential acts of wildlife crime in rural areas, such as attempts to set poisoned bait for birds of prey – a practice that can also cause harm to humans.

JETSONS FOR REAL

Under an initiative launched in July, Dubai became the first city in the world to use a UAV as a passenger vehicle. Aimed at VIP tourists, the Chinese-made Ehang 184 module has a 30-mile range and a top speed of 100mph.

INTENSIVE CARE

Israeli firm Tactical Robotics is working on a large-scale passenger UAV designed to rescue wounded soldiers from combat zones. Set to launch in the next five years, the Air Mule aims to replace logistically difficult helicopter evacuations.

The fixed-wing Sirius Pro UAV can complete full visual capture of a 1km² area in just one hour



“The green advantage of a UAV is that it isn’t bound by the fixed road, so it can go anywhere – particularly in a straight line, the shortest route between any two points. A UAV would also be less prone to human error”

MIRACLE MILE

In the great chain of transport logistics, delivery UAVs are currently at an experimental stage. However, their role at last-mile level is bound to expand, according to Stuart Berman, vice-president and managing director at fleet-management technology specialist Teletrac Navman. This will be a welcome innovation for project managers looking to bring efficiencies to complex project supply chains.

“In terms of time, emissions and congestion,” Berman says, “the last mile is often the most expensive part of the delivery process. We’re talking difficult places to get to, small roads and heavy traffic.

“With regards to what’s actually being delivered, it’s also the least efficient stage. Typically, a vehicle will carry multiple, light products, and deliver only one shipment per destination. The last mile also presents

numerous challenges around navigation to out-of-the-way places, parking and sometimes the need to interact with customers as deliveries are completed. As they become more integrated with that stage, I think UAVs will alleviate a lot of those issues, saving significant time and money.”

He adds: “At the latest Consumer Electronics Show, several companies unveiled plans to launch trucks with UAVs in their roofs. Under those concepts, the truck would handle the motorway phase of the journey, with UAVs taking off to cover the last mile. Anywhere you’re dealing with

slow-moving, congested traffic in stop-start conditions, emissions are at their worst. But the green advantage of a UAV is that it isn’t bound by the fixed road, so it can go anywhere – particularly in a straight line, the shortest route between any two points. A UAV would also be less prone to human error, so it wouldn’t take a wrong turn and then have to backtrack, wasting a lot of fuel.”

In Berman’s view, “it’s inevitable that, at some point, there will be a convergence between UAVs and driverless vehicles. You can imagine a company having a warehouse with a driverless fleet and using the trucks to cover the country’s major trunk roads, with drones intuitively hopping off to make deliveries along the way, and then flying back to the mothership vehicles. The sky is, quite literally, the limit.”

MATT PACKER is a freelance writer and editor

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Your tech wishlist

What project management software do you find useful and what would be your dream product? We asked delegates at the APM Project Management Conference 2017 for their views



RHONDA BENNETT
HEAD OF PROJECT SERVICES,
PINSENT MASONS

We use Microsoft Project. We've looked at software called MindView that we haven't put into full use yet, which one of my project managers did a trial on.

The software we use has the ability to produce really good plans. However, it's still quite static in terms of some of the things we'd like to automate in the future. It's a work in progress.

It would be great to have one piece of software that you could feed all of your project plan information and various requirements into – one that automated all of the documentation and reporting into a dashboard in terms of the progress of the project.



VILAS PATEL
IT PROJECT MANAGER,
PINSENT MASONS

What I like about Microsoft Project is that it's very efficient for monitoring and controlling a project for resources and budgeting. What I don't like about it is that you don't have much control if you need it to work in a particular way. Excel is more configurable; you could end up having everything in Excel as a one-stop shop.

My dream product would be something that would interface with a reporting tool as well. For example, if I'm updating my project plan and then I have to do a weekly report, all of my updates would be in there in terms of my risks, issues, what's been completed, and what percentage things are at. It would be great if I could fire a button and that would go into a PowerPoint presentation, then I could shoot that off. What I don't like is that everything is siloed at the moment – I want something more collaborative.



HITESH PATEL
IT PROJECT MANAGER,
WARBURTONS LTD

We use SAP for core business operations, plus some niche software products. There's stability and it's multifaceted, so you have lots of different modular areas that can integrate. In a fast-moving consumer goods organisation like ours, we need to make sure we can deliver to lots of different stores, very quickly. SAP allows us to do that.

Speaking to people in the business, their dream piece of software would be something where you could press one button and all the information would go into a database that allows you to see everything you need to see – real-time information at the touch of a button.



REBEKKA STUBBS
ASSISTANT PROJECT MANAGER,
LHASA LTD

We use software called Jira. It's got lots of different reports on it. We work in a scrum process, an agile project management process, and Jira allows you to see 'burn up' and 'burn down' charts, which are really useful in showing if you're on track to meet deadlines.

I would want more help with resource management – so you can make sure you know what your resources are doing and solve any conflicts. You would be able to see what people are working on across the business and allocate tasks in that way.



NEIL JARVIS
HEAD OF PROJECT MANAGEMENT,
BABCOCK INTERNATIONAL

IFS is a good tool from an enterprise management perspective, because it's tried and tested, and has a large user base. It's difficult in a large organisation to continue to adapt a piece of software.

We need visualisation tools where you can look at the complexity of scheduling and risk, and look at them in a similar visualised environment for multiple stakeholders. I'm sure there's some kind of virtual reality-based technology where you can sit there and access that information, but I haven't seen it out there yet.



ROBERT DALE
PROJECT MANAGER,
LV INSURANCE COMPANY

Being a project manager, I'm a control freak. With SharePoint I like the opportunity to see version control, to see documents checked out. There's additional capability around being able to assign people tasks. We find it useful – it's a good opportunity for other project managers to be able to see the other documents that are being produced and share best practice.

There is nothing on the market that does everything a project manager needs. There are tools that do one or two things well, but in any organisation you need to be able to bring all of those tools together to have a comprehensive offering. To be able to get the buy-in to say 'we're going to do it in this way' is tough. There's an unfortunate habit for one part of your organisation to use one thing, and one part to use another – it's difficult to get best practice with a limited number of tools.



TIM KNIGHT
HEAD OF PROJECT AND PROGRAMME
MANAGEMENT, QINETIQ

Although our current suite does the day job for project management, we also have our finance system and our competency assessment software that doesn't link across. The panacea for me would be something that brings that functionality together, so that, as a manager who deploys people onto projects, I could see the competency of an individual, the aspirations of an individual, what training and development that individual is planning to do, and therefore what projects are the best place to deploy them to.



SUE SIMMONITE
HEAD OF PROJECT PLANNING,
MODELLING & ANALYSIS,
BAE SYSTEMS

BAE Systems delivers a diverse range of projects, programmes and portfolios that vary in value, scale and complexity. Having the right tools is fundamental for project managers. However, there is no 'one size fits all' solution that covers this broad range. We do, however, look to utilise industry-leading systems and tools as appropriate. The future focus for BAE Systems Project Management is on integrated solutions for digitisation and project performance reporting.

A PRACTITIONER'S GUIDE TO BENEFITS MANAGEMENT

by NEIL WHITE and REBECCA CASEY



This article sets the scene for successful change outcomes enabled through the effective application of benefits management. Aimed at the project and programme level, it describes many activities and capabilities that can be used in support of portfolio management goals.

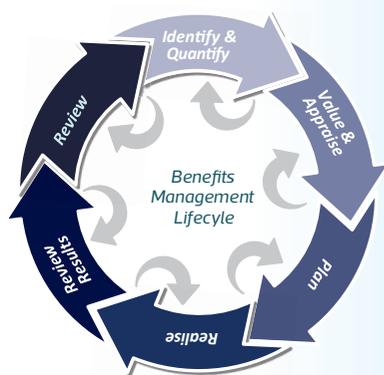
WHAT IS BENEFITS MANAGEMENT?

A benefit is defined as the measurable improvement from an outcome perceived as an advantage by one or more stakeholders (Managing Successful Programmes). Benefits management is a discipline that proactively ensures the expected benefits of change are understood and realised throughout the full life cycle of an investment (Thorpe, 1998, 2003).

Identifying business benefits also involves: identifying the changes required to realise the benefits; identifying measurement for both the progress of the changes taking place and the benefits being realised (which may not always be directly quantifiable in cash terms); and assigning clear accountability for both the delivery of the changes and the realisation of the benefits.

WHY DO WE NEED TO ADOPT BENEFITS MANAGEMENT?

Benefits don't just happen, and rarely happen according to plan – they need to be actively managed (Thorpe, 1998, 2003). In today's world, change is increasingly the only constant. Organisations, both public and private, that fail to embrace and effectively manage change (such that they realise the expected benefits) will fall behind their competitors, and will fail to meet their customers' expectations and deliver the performance that shareholders, ministers and taxpayers demand. A clear and well-conceived strategy for an organisation is nothing without an effective and efficient means of delivering benefits from change through projects, programmes and, for some larger



THE BENEFITS MANAGEMENT LIFE CYCLE

Benefits realisation is the only reason for investment in change. As part of this practitioner's guide, we have created a diagram that provides a framework that organisations can adopt to optimise the realisation of business value from their

investment in change. A snippet from the larger diagram is shown above.

The diagram is available to view and download for future reference on the APM Benefits Management Specific Interest Group web page: www.apm.org.uk/community/benefits-management-sig/benefits-management-lifecycle

organisations, portfolios. A continuous and rigorous focus on benefits and its relationship with change management should be at the heart of effective portfolio, programme and project management.

Research reveals that organisations that have processes and practices closely aligned with benefits management processes are more successful than others (Ward and Daniel, 2012). The Project Management Institute, in a recent *Pulse of the Profession* article, concluded that organisations that align benefits to organisational goals waste less money.¹ Nevertheless, there is still limited understanding of the nature of benefits that can be realised, what needs to be done to deliver them, and the key roles and responsibilities.

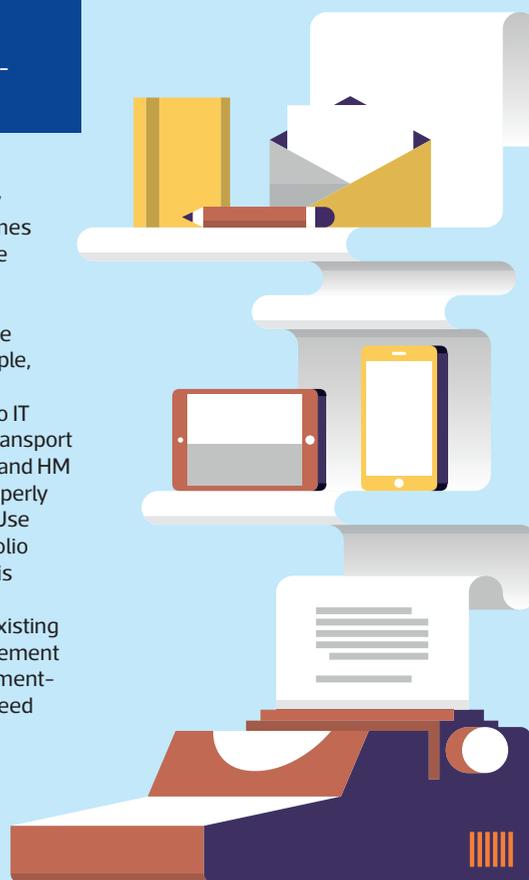
BENEFITS MANAGEMENT AND COLLABORATION

Benefits management is one of several management disciplines that must work collaboratively together to help the organisation achieve its strategic objectives through change projects, as well as keeping performance high in the day-to-day business. In support of this need, ISO 44001:2017 specifies requirements for the effective identification, development and management of collaborative business relationships within or between organisations. These include, but are not limited to: strategy; portfolio, programme and project management; performance management; accounting; HR; and change and contract management.

BUILDING CAPABILITY

Given the significant sums of money involved in transformation programmes and the continuing poor performance of many projects, it is not difficult to understand why interest in benefits management is increasing in both the public and private sectors. For example, the NHS now mandates benefits management in support of change to IT infrastructure; the Department for Transport uses it on all infrastructure projects; and HM Treasury expects to see benefits properly accounted for in all business cases. Use of the project, programme and portfolio management maturity assessment is growing as organisations attempt to understand the gap between their existing levels of maturity in benefits management and other project/portfolio management-related disciplines and where they need to be.

It is clear that developing an organisational capability in benefits management, both in terms of processes and skills, is crucial if organisations are going to achieve optimal performance of their change portfolios and competitive advantage. For some, this might mean starting small – getting it right on one project or programme and building from there. For others, it might require a top-down holistic approach – getting the board involved in more transformational capability enhancement programmes. It really depends on the size of the issue and the



ORGANISATIONS THAT FAIL TO EMBRACE AND MANAGE CHANGE WILL FALL BEHIND THEIR COMPETITORS



FIVE TOP TIPS FOR SUCCESSFUL BENEFITS MANAGEMENT

1. Stakeholders affected by the change should feel connected with the project and, where possible, be engaged in two-way communication with the team.
 2. Ensure that measures used for benefits progress are, where possible, already used for measuring day-to-day performance of the business.
 3. Build your benefits map right to left. Start with the problem you are trying to solve (or objective you are trying to achieve). Then ask what benefits would be realised if the problem was solved or objective achieved. Then ask what work would be required to bring about those benefits.
 4. Use a dual dimension approach, whereby benefits are classified first by type, eg financial, cashable, and then by category, eg quality, efficiency, innovation.
 5. Establish a benefits management forum within the organisation or with partner organisations. Meeting delivery and change management colleagues on a regular basis to discuss ideas and disseminate lessons learned really helps individuals to learn and grow.
- For more information, visit the benefits management page on APM's website at bit.ly/2hQ2FL6

THE EXECUTIVE SPONSOR OF THE BUSINESS CASE IS ULTIMATELY ACCOUNTABLE FOR THE REALISATION OF THE BENEFITS

urgency in fixing it, and this is for the board or sponsor to decide.

KEY ROLES AND RESPONSIBILITIES

The executive sponsor (or senior responsible owner) of the business case is ultimately accountable for the realisation of the benefits. Such is the importance of this role that the Infrastructure and Projects Authority has included a role description in its newly published *Project Delivery Capability Framework*.

However, the responsibility for the implementation of the business changes required to realise those benefits lies with the relevant business change managers or 'benefit owners'. The relationship between the project or programme manager and the business change manager(s) is crucial. The delivery of project outputs and the management of business changes must be closely coordinated. ¹



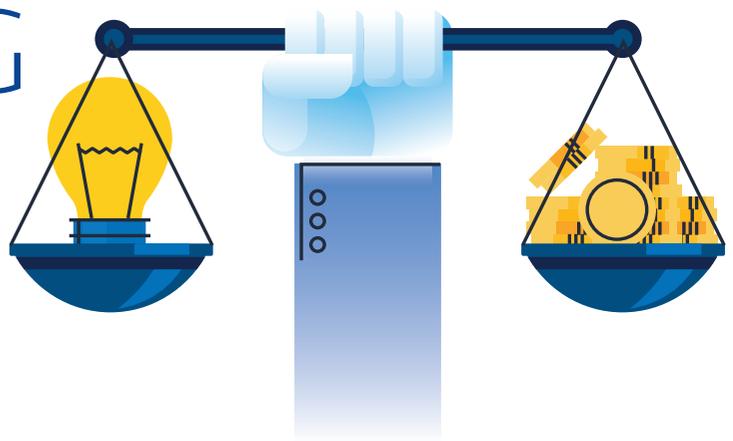
NEIL WHITE is chair of the APM Benefits Management Specific Interest Group



REBECCA CASEY is a lecturer in information systems management at Newcastle University Business School

¹ bit.ly/2um5gWE

EVALUATING 'VALUE FOR MONEY' MODELS



As part of his research on social return on investment, **DR PETER HILL** looks at the need to continually refine the way we evaluate projects

Demonstrating 'value for money' has become a central concern and obligation of public- and third-sector projects/programmes. The National Audit Office (NAO), the main evaluator of public- and third-sector organisations, requires them to demonstrate they are delivering their intended outcomes while showing the 'three Es' of economy, efficiency and effectiveness. The NAO explains this process using the below diagram.

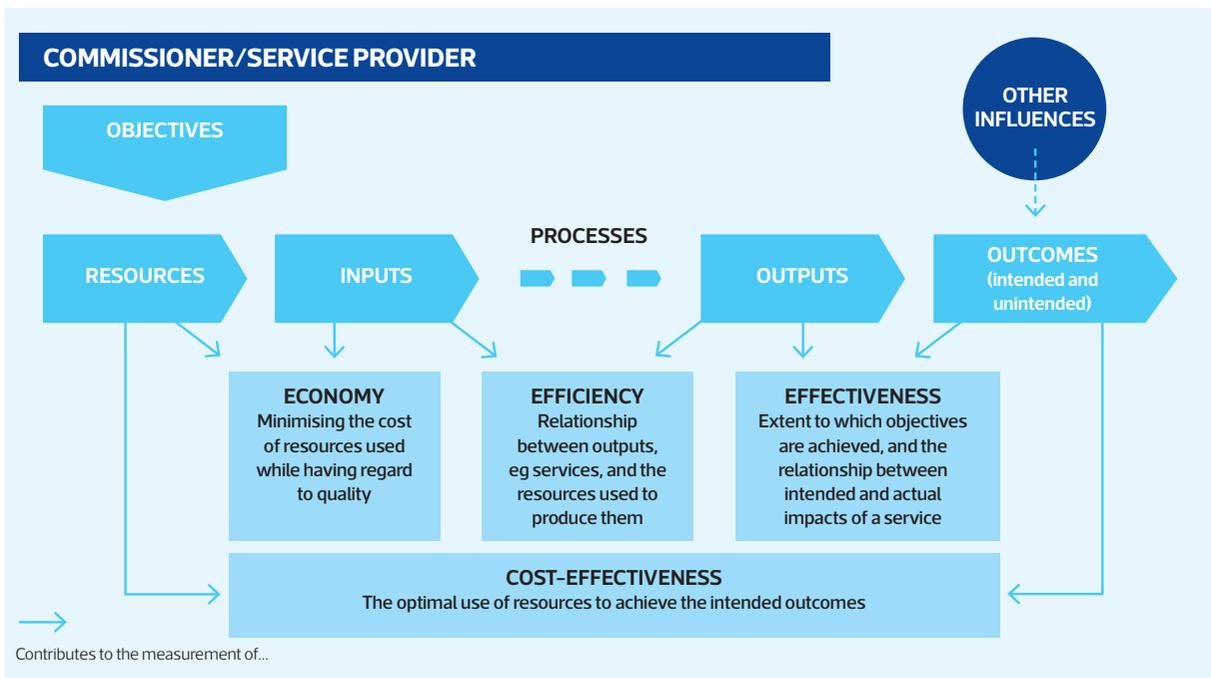
CURRENT PRACTICE

To demonstrate this 'value for money', evaluators must therefore attempt to give a financial value to the costs and benefits of the project/programme. However, a problem soon emerges in that there are many costs and benefits that are not easily quantified. If we take, for example, a citywide project to increase the number of green public spaces, how does one quantify the

additional 'public amenity' of having beautiful green spaces?

The following economic valuation models have been designed and attempt to value social costs and benefits:

- 1. Contingent valuation method (CVM)**
CVM "involves eliciting the maximum amount that people are willing to pay for welfare improvements and the minimum that they are willing to accept as compensation for welfare loss, to derive ▶



THE SIX STAGES OF SROI



a demand curve for the good in question” (Quah and Toh, 2012, p14). Using the example above, this would involve asking city residents how much they would personally be willing to pay for the additional green spaces or accept in compensation for not having them.

2. **Hedonic pricing** This method uses price differentials in existing markets as proxies for prices with certain attributes (Quah and Toh, 2012). To give a very simple example, if one house is worth £2m with an average ambient noise of 20 decibels (dB), while another is only worth £1m and has an average ambient noise level of 35dB, we can ‘price’ a reduction of noise by 15dB as £1m.
3. **Travel cost method** Also known as the Hotelling-Clawson-Knetsch technique, this is most often applied to estimating the value of recreational sites, such as holiday resorts. It uses the cost of travel as a proxy for price, thus allowing us to create a demand curve for the amount people are willing to pay to visit a particular site.
4. **Shadow pricing** This is a proxy value of a good/service, often defined by what an individual must give up in order to gain an extra unit of the good/service – eg the journey time saved by motorists as a result of a new motorway can be quantified using an average hourly wage rate.

THE RESEARCH PROBLEM

These economic valuation models rely on underlying conventions of measurement. This has consequences, as it means evaluations are constructed from the moral viewpoint of the evaluator, not the evaluand (those subject to evaluation).

Economics of Conventions (EC) is a French school of economic thought.

SROI'S VALUATION OF SOCIAL COSTS AND BENEFITS IS DEVOLVED AS MUCH AS POSSIBLE TO STAKEHOLDERS

It presents a strong challenge to current practice, as it questions the claimed objectivity of quantitative evaluation by drawing attention to the social construction of measures and indicators.

“Quantification is guaranteed by ‘conventions of quantification’ that are the outcome of controversies about the good, or convenient, way to evaluate persons and things, according to desirable social goals aimed at” (Centemeri, 2014).

This means that ‘conventions of quantification’ are underpinned by the moral values and social expectations of those who then decide how to quantify social phenomena. For example, a project or programme that seeks to improve the employment rates of lone parents is driven by the moral expectation that lone parents should work. The statistics used (in this case, lone-parent employment rates) are therefore driven by that same moral expectation.

OVERCOMING THE EC CRITIQUE

Social return on investment (SROI) emerged in 2006, as it was recognised that traditional evaluation techniques struggle to account for social and environmental impacts. SROI is a process and framework for forecasting and evaluating services and projects where it is not immediately obvious how to quantify the financial (and perhaps other) return (APM, 2016). SROI is perhaps the best solution so far at overcoming the EC critique in that it asks the evaluand and the fullest possible range of other stakeholders how much they value something, and then triangulates their responses to evaluate previous or forecast future outcomes.

However, SROI does not fully overcome the issues raised by EC. When working through the six stages of SROI (shown above), the process is still very much led by the evaluator, who chooses what to include in the scope, which stakeholders to engage with and how, and how outcomes are mapped. The evaluator is still able to define what matters based on their own moral judgements. Even completely

qualitative evaluations, such as open-ended questionnaires and interviews, would still not overcome the problem of claimed objectivity, as the evaluator would be the one designing the questions and also interpreting any responses. They would do so from their own moral perspective.

CONCLUSION

EC presents a strong challenge to the claimed objectivity of metrics used for project/programme evaluation. This is especially true for public- and third-sector projects/programmes where social costs and benefits are of central concern. SROI is arguably the best solution to date in that its valuation of social costs and benefits is devolved as much as possible to stakeholders.

Given continued funding challenges faced by the public and third sectors, there remains a need to put different social costs/benefits into a common medium of exchange, ie to financialise them. Although it may be impossible to fully overcome the critique EC poses, as project professionals, we should at least recognise our subjectivity, acknowledge it and continually seek to improve how we evaluate our projects and programmes. **□**

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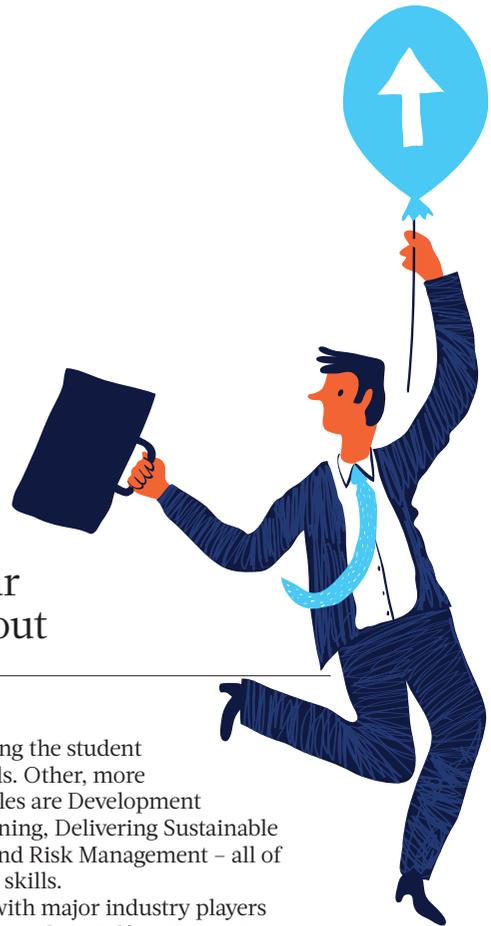
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DR PETER HILL SFHEA is a visiting senior lecturer at King's College London and BPP University

STAYING THE COURSE

Studying for a postgraduate project management qualification can be a great opportunity to develop the skills to take your career to the next level, as **MATT PACKER** finds out



Managing your career so you achieve your goals can be difficult to get right, especially in the early stages, when the urge to express tireless dynamism and make oneself indispensable can be all-consuming. And although nothing can replace the knowledge and experience gained on the job, for many project managers, the opportunity to further hone their skills on postgraduate project management courses – either while still working or during a sabbatical – can, in the long run, offer that extra advantage in furthering their careers.

Here, three leaders of postgraduate project management courses discuss how their offerings work and what guidance they provide – and two alumni explain how their postgraduate studies added an edge to their already successful careers.

STRUCTURING TALENT

Brian Cato MSc MRICS FHEA, senior lecturer, University of Greenwich, Department of the Built Environment

Our department offers a range of postgraduate project management degrees with a mix of core courses and a choice of specialist options.

The degrees include a final dissertation, but the individual modules are assessed through written work and practical applications of the theory. The course content allows the student to build various key project management traits, with an emphasis on construction.

The Construction Project Management module focuses on theories and principles, and develops soft skills in areas such as teamwork, communication and negotiation. Its twin module, Applied Project Management, puts the student into typical construction scenarios, such as assessing project scope, resource allocation, adding value and

procurement, allowing the student to apply the soft skills. Other, more technical core modules are Development Economics and Planning, Delivering Sustainable Built Environment and Risk Management – all of which focus on hard skills.

Our relationship with major industry players who hire our alumni, such as Balfour Beatty, Laing O'Rourke, Transport for London (TfL) and Barratt Homes, provides students with opportunities to visit significant construction sites to watch project management in action, and see how soft and hard skills are used in challenging scenarios. That close relationship with contractors and consultants alike provides a balanced approach to project management, from conception to post-completion.



Roger Gemmell, principal teaching fellow, Warwick Manufacturing Group, University of Warwick

We avoid being specific about the application of project management in one, precise environment. Many postgraduate courses in the field relate to, say, construction or IT, but we treat

project management as a generic body of skills with wide application. However, students can choose to narrow down that broad coverage by choosing two or three option modules, which enable them to steer towards the area in which they intend to practise.

Half of the credits come from a main project, which must be of interest to a specific employer. Our goal ▶

THE OPPORTUNITY TO FURTHER HONE THEIR SKILLS ON POSTGRADUATE PROJECT MANAGEMENT COURSES CAN, IN THE LONG RUN, OFFER THAT EXTRA ADVANTAGE

is that an employer will look at a student's projects and think: 'This candidate's in-depth grasp of this topic could be valuable to me.' The project's format is either library or primary research leading to a 20,000-word dissertation, then an oral examination to check their understanding of the relevant issues.

Various academics will put up project topics – some of which come with industrial partners attached – and students can compete for those. Alternatively, they can pick their own ideas. In either case, we will appoint a supervisor to guide the student's work and ensure that their research fulfils our criteria for relevance and value.

Given the current expansion in demand for project management capability, employers may not always be able to secure those with direct experience – but they can engage people who understand the principles and risks of project management, and they are the types of individuals that we aim to produce.



Professor Andrew Edkins, The Bartlett School of Construction and Project Management, University College London

Our postgraduate project management offering comes in the shape of four master's courses.

The main ones are Construction Economics and Management, Project and Enterprise Management, and Strategic Management of Projects. Then there's the outlier – Infrastructure Investment and Finance – which mainly addresses the financial structure around large projects, but features a small element of supporting project management content, too.

Our intellectual underpinning is the work of Peter WG Morris, who ranks 'understanding the management of projects' above the more process-driven concept of 'project management'. As a result, our outlook is intensely strategic. We produce people who understand the toolbox that any project manager will need to reach for in order to provide the most effective input.

At postgraduate level, we've seen a real rise in interest from women, and also from people with increasingly wide and eclectic academic backgrounds. As such, they're going on to a set of equally wide and eclectic destinations. Even if they explore built-environment examples during their time with us, they may do that purely to pick up the underlying principles, and then apply them to IT, finance or work in various government departments.

On Project and Enterprise Management, we get 10 or 15 trainees per year to develop specifically for TfL, because the firm wants to create its own project management approach. TfL recruits non-cognates who spend a year with us doing a fully sponsored MSc. Then they follow that up with two years of work training at TfL. Our other postgraduate students have gone on to firms such as Space, Mace and CBRE. 

MATT PACKER is a freelance writer and editor

REINFORCING CAREERS



Sophie Aldridge-Neil, project manager, infrastructure projects, Network Rail; MSc Project and Enterprise Management, The Bartlett School of Construction and Project Management, University College London (UCL)

My geography BA from the University of Leeds in 2006 led me to work at Natural England, and later the Environment Agency – fantastic places where you make a difference every day. Sadly though, thanks to the recession, pay freezes, job cuts and a lack of opportunity hit the environmental sector. I needed a change.

Project management offered significant career flexibility, numerous challenges and learning opportunities. Following gruelling assessment rounds, I was accepted onto Network Rail's Project and Enterprise Management MSc scheme at UCL. The firm provided the extra incentives of paying for my fees and accommodation, along with a guaranteed job at the end of the course, which I'm pleased to say I passed with distinction.

My work at Network Rail has included large projects such as the Great Western electrification, HS2 and Crewe Hub, as well as property, station and platform enhancements throughout the South East. It continues to challenge me every day – but I know that the MSc has made a difference to how I perform. It gave me an overview of pertinent theory, legislation and real-life examples to help me shape best practice with confidence.

A master's is not for the faint-hearted. It will be much harder than you think – especially if you've had time out from study. But it will enhance the skills and tools you need to make real

improvements, personally and professionally. After seven years and a couple of promotions, I am still on the hunt for new knowledge, experiences and opportunities.



Tasos Vezyridis, group research and strategy director, Land Securities;

MSc Programme and Project Management, Warwick Manufacturing Group, University of Warwick

I graduated from the National Technical University of Athens in 2003 with a BSc/MEng in surveying engineering, and began my career working as an engineer in a residential property development firm. However, I was keen to keep learning while I worked, and enrolled onto Warwick Manufacturing Group's MSc. After graduating, I joined Barclays Capital as an analyst in its corporate real estate team. Although I was based in London, my team had a global remit and I was involved in a variety of large, cross-continental projects.

My experience of the MSc course – along with being part of Warwick's dynamic and international student community – gave me the required knowledge, skills and confidence to perform outstandingly in a global corporate environment.

After Barclays Capital, I continued my studies with an MBA at London Business School before joining Land Securities, the UK's largest real estate investment trust. I now lead the Land Securities research function, advising the board, executive committee and portfolio teams on trends in the UK property cycle and wider economy.

FROM THE BOTTOM UP

CHRIS HARRIS, director at the rpa:group, reflects on a career whose highlights have included a number of mega projects in the Middle East

I got into project management via the main contractors side of the industry. Having worked my way up to contracts manager, I was provided with an opportunity to move across to the consultancy side with EC Harris (now Arcadis). I soon found that the technical skills I'd learnt in contracting were a valuable commodity in consultancy, and provided both extra rigour to the construction process and added value to client requirements on large projects in the Middle East.

The highlights of my career have been working at a senior level on mega projects in the Middle East. My roles in Abu Dhabi have included construction director for the World Trade Center and New York University, and deputy project director for the new Louvre on Saadiyat Island. Apart from being very demanding, being involved in some of the most technically challenging projects in the world has massively enhanced my abilities.

Working in a multicultural environment where professional demands are exceptional, and technical problems require a 'can-do' attitude, brings challenges – but these have driven my career in a direction that would not otherwise have been possible.

CHASE EXPERIENCES AND ALWAYS KEEP LEARNING. SUCCESS, IN WHATEVER FORM, WILL COME IF YOU INVEST IN YOURSELF

Currently, I am a director at the rpa:group and responsible for the project management division. The role has wide-reaching responsibilities and includes managing client relationships, advising staff on operational activities, setting clear strategic direction for the division and feeding into the overall business. I am responsible for ensuring staff are adequately trained and up to date with key legislation, skills and more. As an

equity partner and board member, I am also responsible for helping to ensure the smooth operation of the business as a whole to support the CEO and board.

I love the variety of work in my role. From live site visits to staff coaching and client meetings, no two days are ever the same. Our team undertakes a great variety of work for many clients, and those elements can involve complex issues.

The challenge to help others improve their outcomes is what gets me out of bed every morning. This could involve helping clients to deliver exceptional results, or growing staff into more effective professionals.

There are many people who have influenced my career. Kevin Stobbs was the first senior project manager I met. He offered me a job for a year on a dual-carriageway project, which led to a long-term post after university at Henry Boot. Kevin showed me what a good education provides in the workplace – the skills required, and the drive and ambition to succeed. David Wood, chief engineer at Henry Boot, guided me through a formal training agreement towards becoming a Chartered civil engineer. He was an ever-present mentor and role model.

Finally, Mike Cairney, a partner at EC Harris, mentored me in a construction director role and provided me with an opportunity to grow into a rounded and experienced consultant with technical skills and a more measured approach. Mike believes every day should be a learning experience, and that your career should provide continual learning and improvement in all aspects of professional life.

So what lessons have I learned? I know it's a cliché, but the world is a very small place, and what goes around comes around. There have been many occasions



CHRIS HARRIS is director of project management at the rpa:group

in my career where opportunities have arisen that I could easily have ignored, with nothing in it for me. However, in those instances, I have always chosen to do something to help others. Almost without exception, I have reaped some benefit from this approach further down the line. It is a valuable lesson that treating others well will undoubtedly provide a long-term benefit.

I'd advise up-and-coming project professionals not to chase money and titles. Chase experiences and skills, and always keep learning to improve yourself. Success, in whatever form, will come if you invest in yourself, and it will taste sweeter for being hard earned. In short, work hard, listen to others, make good choices and learn from your mistakes. 📌



Do you have an interesting career story that you would like to share with readers of *Project*? Email editor@project-journal.co.uk

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CAREER CLINIC

Stop that watermelon reporting!

Watermelon reporting – it looks green on the outside, but when you cut it open it's red. Emma Arnaz Pemberton, chair of APM's PMO Specific Interest Group, introduced me to this term, and I think it's fabulous, although also painfully frequent.

With 'fake news' being the new term for 2017, it's worth remembering that, in our industry, integrity and professionalism stand tall. You have to tell it how it is. The opportunity to achieve the highest levels of professionalism through APM's Chartered status reinforce this position of professional integrity even further.

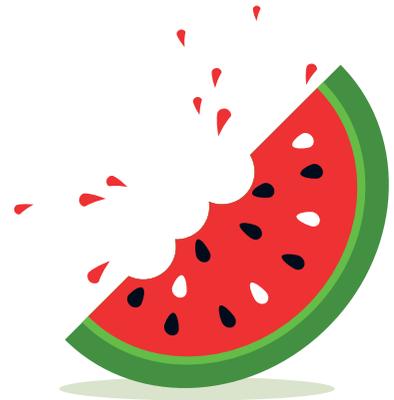
When training or mentoring, I always emphasise the importance of telling it how it is. If it's red, say it's red. The classic project status of red, amber and green key performance indicators (RAG KPIs) for schedule, cost, benefit, risk, resource, health and any number of other indices is project management bread and butter. It should enable senior managers to manage by exception and focus on those projects

that need some help and attention. But if project managers are submitting dubious RAG KPIs, then this is going to take them seriously off track.

A good project manager can be involved in a project that is not going to plan. Things happen. A good project manager will highlight the true situation and take action, not hide the truth and pull out a watermelon. Equally, the project management office, sponsor and other senior stakeholders should be close enough to recognise a watermelon when they see one.

This honesty might be uncomfortable in the short term. You might be pulled in front of the project board or senior executives, but be prepared and able to explain the situation in detail and then, of course, provide recommendations.

Confidence is built when you show the true status and a path forward. Every project starts with a clean slate, and every organisation should define the use of red,



amber and green, rather than leaving it to each project manager to pick a crayon of choice.

So, for your projects, take an honest look. Is it really green? Or is it looking a bit watermelon-ish? Put that fruit aside, stand tall and face reality. It's the best solution in the long term both for the project and, more importantly, for your professional integrity. No more fake news, thank you.



VINCE HINES is managing director at Wellington Project Management, working with APM to offer career advice

Appointments



Changes in Arup's UKMEA management teams

Dervilla Mitchell (pictured left, top) has been appointed chair of Arup's UK, Middle East and Africa (UKMEA) region. She replaces Alan Belfield, who has become chief operating officer and deputy chair at Arup Group. **Richard Matthews** (pictured left, middle) will take over from Dervilla as lead for the UKMEA region. Following the retirement of Colin Stewart, global and UKMEA rail leader, **Stefan Sanders** (pictured left, bottom) has been appointed as Arup's UKMEA lead for rail, having been with the consultant since 2003.



New appointments at Morgan Sindall

Construction and regeneration group Morgan Sindall has made a number of senior appointments. **Simon Smith** has been promoted to managing director of nuclear, energy and water following his previous role as managing director of utility services. **Stuart Parker** has been appointed as managing director (construction Scotland), taking over from Harry Thorburn, who retires at the end of the year.

Rider Levett Bucknall boosts team with executive hires

Consultancy Rider Levett Bucknall (RLB) has appointed five Mace executives to help drive its UK growth plans. Former Mace sector director **Ian Blakeman** has joined RLB as partner (data centres). **Andrew Fettes-Brown** has joined as senior partner (quantity surveying), having previously been operations director at Mace. **Nick Eliot** has joined as senior partner; he was formerly Mace's head of London and the South East. **Paul Goodwin** has joined as partner (engineering services) and **Tim Spencer** has joined as partner (corporate fit-outs).

New role for Wharton



Global professional services company KBR has appointed **Jason Wharton** as vice-president, project delivery, for the Asia-Pacific region. Jason is based in Australia, where he has previously led a number of upstream gas programmes for a joint-venture operator.

Fitzpatrick joins Mott MacDonald

Mott MacDonald has appointed **Gerard Fitzpatrick** as projects director for rail in its cost management division. He joins the consultancy from Currie & Brown.

Bookshelf

Which books should be top of your reading list this autumn? *Project* readers find out



MEET THE PANEL



Ravi Joshi is a change manager. He has a master's in project and programme management from Cranfield University



Roger Batho manages and supports projects in the public sector. He is a member of the APM Enabling Change Specific Interest Group and has recently completed an MSc in managing change and innovation

IF YOU WOULD LIKE TO REVIEW A BOOK FOR PROJECT, PLEASE CONTACT THE EDITOR AT editor@project-journal.co.uk

THE PERFORMANCE OF PROJECTS AND PROJECT MANAGEMENT

Editor: Laurence Lecoeuvre
ISBN: 978-1472421890
Price: £80 (hardback)
Publisher: Routledge



Offering perspectives on a range of topics related to the performance of projects/project management, this book covers a lot of ground. By using a set of relatively short, independent, yet related set of chapters, it manages to keep the overall interest of the reader. The book is well structured and easy to come back to for reference. The differential areas of portfolio, programme and project work are covered well, in addition to key aspects, such as governance, and current buzzwords, such as 'agile'.

On the negative side, it was surprising to find some outdated views included in such a new book. For example, risk management was seen purely as a negative aspect, ignoring opportunities such as positive risks.

I would have liked to see some debate on structuring projects – eg the differing interpretations of what programme management is. I could not find a coherent logic for the topics selected. The important topic of benefits management relating to performance is a missing element. Also, an exploration of the inability of organisations generally to both define the right change and then deliver it is absent.

However, the book could be used as a discussion starter for groups covering a range of topics – eg an organisation trying to introduce agile approaches or improve governance.

It would be very useful if, in addition to each section having a reference area, there was also a further information area. This could include works not referenced, courses, associations or any pointers relating to the topic – eg web links.

Reviewed by Ravi Joshi

LEADING WITH VISION

Authors: Bonnie Hagemann, Simon Vetter and John Maketa
ISBN: 978-1857886825
Price: £14.99 (paperback)
Publisher: Nicholas Brealey Publishing



This book explores how to build and communicate an engaging corporate vision to get 'generation Y' employees' buy-in. It is always encouraging to see someone championing active engagement with, and understanding of, the people that make up teams and organisations. Although the thread of this book focuses on generation Y, I am sure that what the authors are advocating would help anyone feel more invested in their work and, in return, help their organisations get more out of them.

At the start of the book, the authors use anecdotes to bring their methodology to life. This is interesting and feels natural, but, later on, begins to feel like an attempt to flesh out what might otherwise have been a much shorter read. Luckily, there are 'takeaways' at the end of each chapter, so the reader can choose to skip the padding if they want and go straight to the tools.

This book probably has a space in the marketplace simply because there's not enough out there aimed at helping leaders (project managers or not) understand how to engage and lead rather than drive their employees. Ultimately, this is what many intangible projects live and die by.

There is a disappointingly 'Kotteresque' shadow behind the content of this book. It doesn't take much to imagine his devotees developing it into a toolkit for mobilising employees so that leaders can use and control them. It would be nice to see a version of this book written from the other end of the vision conversation – 'Following With Vision: The employee's blueprint for demanding a compelling vision and engaging the leadership'.

Reviewed by Roger Batho

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EDDIE OBENG offers his insights on how to stay ahead in our fast-moving, interconnected world



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

There's a revolution going on. Everyone is rushing to digitally transform. Every enterprise, third-sector organisation and government is racing towards this. Some want to prevent disruption. Others want to solve the problem of a lack of skills or talent. Some want to reduce costs, and some are joining in because it's the current fashion.

The transforming technologies are varied but powerful. They offer us infinite possibilities: machines that learn better than us; items that can communicate with each other, robotic drones that can draw upon vast arrays of data, trading platforms sharing complex commercial arrangements, and much more. Even now, it is easy to imagine wearables or implants that will allow the user to feel if a project is running late, or physically sense the areas of risk. Strategists will use these technologies either to replace staff and eliminate jobs or to augment and enhance people, making them slightly superhuman.

As a project leader, this revolution will hit you in one of two ways.

First, investors have high expectations for transformation, and activity is at fever pitch, so you will pick up projects that will aim at more than just your normal project change. They will aim at transformation.

I define 'change' as a caterpillar getting fatter every day. Change is not transformation in the same way that a butterfly isn't a caterpillar with wings. The caterpillar's competences are eating your cabbages and walking on many legs; a butterfly's are drinking nectar and flying. They are not the same.

Transformation is what makes a butterfly out of a caterpillar. To succeed with transformation, you need to deliver three different, interwoven projects: you'll need projects to generate and maintain the 'fuel for transformation'; you'll need to create the 'scaffolding' and security for transformation; and then you'll need to build the new capabilities. Success requires three very different styles of leadership.

The second way you will be hit is in the changing nature of your teams. They will be augmented. I have been leading teams of enhanced people for more than eight years. For our transformation, we adopted a

virtual-reality-based way of working. Using virtual reality to replace real-life offices essentially means that my global team faces no barriers to collaboration. Distance, time zone, seniority and gender – all are removed. There is plenty of (virtual) project space, so charts can be left on walls and spreadsheets on screens. Every team member is just two clicks away from a full face-to-face discussion or brainstorm.

And it is easy to maintain a single version of the truth. We call this highly transparent, interactive and supportive productivity method 'working out loud'. (It's a dream for anyone trying to deliver agile from more than one location.) Effectively, each of my team members is more like Superman than a human. They are faster than a speeding bullet, with the ability to see information through walls. It means that, as project leader, you are no longer the spider in the middle of the web, because your team members also have the same access to each other and the work. **■**

FIVE LEADERSHIP LESSONS

Here are some tips for leading a global team who have never met each other, and whom you rarely see

- 1. Remove the fear of flying.** It's better to reduce fears than inspire to action.
- 2. Momentum is more important than direction.** Often, no one really knows the best outcome. If you get people moving, you can rely on them to steer the actions towards benefits if you make results suitably transparent.
- 3. Looking at the bottom of the mountain is less scary than pointing at the top.** Encourage your teams to try easy things first, and put in triggers to reinforce these into habits.
- 4. Feel the speed by looking out of the side window.** Reminding people about how amazingly they are working is more powerful than direct praise.
- 5. Plant trees on slopes.** The more interdependence you can encourage and gain in your team, the more resilient and capable they will be. Make sure you are one of the trees.



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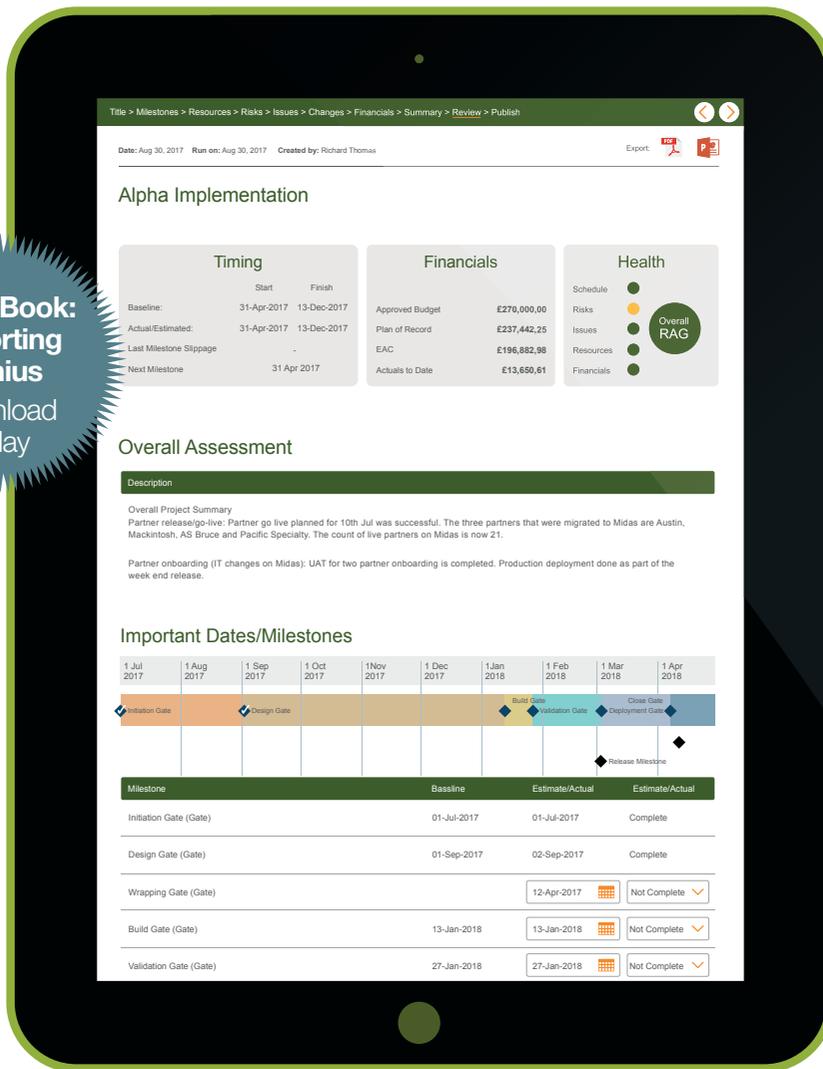


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