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# Project Management vs Managing Projects

The Issue of Training

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Michael B Bender, MBA, PMP, CSM

A few months ago, I read an article on LinkedIn entitled, [The PMP – How it Ruined Project Management](#) which compelled me to respond quickly. In my response [The PMP – How it Ruined Project Management – A Follow-Up](#), I noted a cultural shift in how we recognize and hire project managers (as well as other recognized positions). Early in the new millennium, we (culturally) adopted a process of recognizing excellence through certifications. The problem with certifications is that they are test-based, rather than skills-based. While some believe you can estimate someone's skills through testing, I believe that, at least in the case of project management, testing is not only insufficient in measuring skills, it also shifts focus away from the more important skills needed by project managers.

Some (many) years ago, a colleague and I contemplated the difference between “project management” and “managing projects”. We concluded that *project management* consisted of a framework (or structure) for managing projects; while *managing projects* includes the actions that project managers perform day-by-day. The former is knowledge-based, the latter is skills-based. We discovered that many individuals “know” project management, but still can't run projects successfully.

To put this into perspective, most people have an intellectual and working knowledge of screwdrivers and other basic tools. Many have an understanding of the internal-combustion engine. Despite this knowledge, very few would be capable of fixing a broken car. Conversely, one doesn't need a thorough understanding of the internal combustion engine to be a good mechanic, a basic understanding will suffice when combined with sufficient experience.

The separation of knowledge and skill has been well-known and well-documented for many years. In the training business, most instructional designers (IDs) design these two perspectives into their programs. Knowledge transfer can be accomplished through lecture, open discussion, and demonstration. Skills transfer requires practice, so IDs build exercises and role-plays into their programs to allow students to practice and develop their skills.

You might be interested to note that when I first entered the training business in the mid 1990's, basic project management classes were 4- and 5-days long. Now, they're typically only three with many companies asking for 2-day and 1-day programs. With some minor exceptions, we cover the same material in all these classes as there is a minimum knowledge set required to understand project management. The difference in the durations is in the skills development. Pure knowledge transfer can occur quickly, but skills development takes time. In 4- and 5-day classes, students were challenged with difficult situations and left classrooms with well-developed skills. To reduce the training duration, IDs were forced to simplify the exercises leaving students

with only partially-developed skills. In 2-day and 1-day classes, instructors only have time for knowledge transfer, leaving students with little or no skills development.

With this background in mind, let's get back to basics.

## Knowledge and Knowledge Transfer

We begin with some basic definitions. The following definitions derive from Chen (2010) regarding knowledge and knowledge transfer:

**Explicit** – Explicit knowledge can be articulated in numbers and words and is expressed using data, specifications, or scientific means. This kind of knowledge is free of context and can be easily shared.

Note: while Chen implies technical learning here, many organizational issues can be trained this way, for example: simple process training.

**Tacit** – Tacit knowledge is the accumulated practical skills or experiences. It is personal and “deeply rooted in individuals’ cognitive processes and/or ingrained in the routine and non-routine processes of an organization’s unique culture”.

Note: Chen makes a big leap here. The key word is “accumulated”. Certainly, accumulated experience takes time to become “deeply rooted” and involves varying situations.

**Individual** – Individual knowledge

**Collective** – Organizational knowledge

These perspectives combine to form four (4) basic types of knowledge (Chen, 2010):

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Individual-Explicit	Easiest to transfer, theoretical knowledge
Individual-Tacit	Action oriented, practical experience
Organizational-Explicit	Written roles and procedures
Organizational-Tacit	Routines, norms, and shared beliefs

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Note that *organizational-tacit* refers to the organization’s culture (routines, norms, and shared beliefs).

While Chen offers an excellent model for knowledge transfer, we’ve discovered that complex skills (including project management) require further gradient steps. For example, you can’t expect an individual who just finished a 2-day introductory project management class to successfully manage a 3-year project involving hundreds of stakeholders. In the next section, I outline these steps and highlight challenges associated with each.

## **Knowledge, Knowledge Transfer, and Organizational Growth**

In this section, we examine the path individuals and organizations follow to successfully affect change. We also examine the barriers that inhibit change. This is not an exhaustive presentation as the number of barriers can be extensive. For brevity, we examine the more common barriers seen in practical experience.

For our scenario, we make the following assumptions. First, we assume a single individual receives training in a new topic. Second, we assume the topic is new to the organization. By this I mean that, while the organization may be aware of the subject, it lacks sufficient knowledge about the topic and have few subject matter experts, or supporting practices in place. I will relate the examples to project management.

### **Step 1: Motivation and the Belief System**

While Chen first introduces “belief” in his organizational-tacit level, our experience demonstrates that this is the first barrier to affecting change. If an individual believes that planning projects (for example) is a waste of time, they won’t want to learn how to plan a project. Motivation to learn a new skill is a prerequisite to any change initiative. The prospective student has to see a benefit to the learning. Here are some typical responses trainers experience in classrooms:

- This (topic) is a waste of time
- That will never work here (a very common response)
- I don’t have time to learn this
- It’s too difficult

One very common barrier exists when the student was “forced” into the training initiative, especially as a punitive action (“to get fixed”). Frequently, the student will become defensive and actually attempt to prove their punisher wrong by finding every possible reason why this topic is invalid.

True learning cannot occur unless the student is motivated to learn.

### **Step 2 – Explicit Knowledge**

The next step is to introduce the student to the new idea and provide basic information about it. As indicated above, this must include the benefit. This generally is considered the easiest of the steps as it simply requires discussion or reading.

### **Step 3 – Individual-Tacit – Controlled Environment**

Learning and skills development occur in gradient steps. You can’t teach someone quantum mechanics if they haven’t mastered linear algebra. The next step to learning involves practicing the new skill in a controlled environment and in gradient steps. The classroom offers an excellent environment to begin this process, but is generally insufficient to develop thorough skills of complex tasks. The degree of development depends upon the complexity of the task and the effect of the environment. For example, we can teach children how to add two numbers in a classroom as this skill is independent of the environment. One plus one is two no matter where you are.

Projects, however, are complex endeavors involving multiple, diverse stakeholders. While some environmental factors can be simulated in a classroom through role-play

and other means, it is impossible to simulate all possible environmental factors in the classroom.

#### **Step 4 – Individual-Tacit – Environment Independent**

The student now attempts to practice their new skills in different environments. As the student experiences new environments, they adjust and hone their tacit knowledge and adapt their style to the different environments. As the learning continues, they find common threads that work in most situations, and adaptations that work in alternate situations.

This is where most project management (and I presume other) training fails as the student jumps from a well-controlled classroom environment to the complex and ever-changing organizational dynamic. The problem lies in the gradient steps. While some savvy students might survive “being thrown into the deep end”, most struggle. There are several reasons for this, but most can be categorized as organizational culture. Some common issues include: management or colleagues are unaware or unsupportive of the new actions; time pressures frequently associated with projects; and existing, outdated, or misaligned processes and systems.

New skills take time to develop. The student will likely make mistakes as they develop their new skills, requiring more time to recover. The likelihood of success depends on a supportive environment where such time is allowed, and mistakes are accepted and offered as learning experiences. Mentoring and peer reviews can play a major role and substantially reduce the learning curve.

#### **Step 5 – Organizational – Explicit**

At this point, the individual (we can no longer call him/her a “student”) has developed sufficient skills and demonstrated success in multiple environments and situations. As the organization recognizes the success, they begin to develop policies, procedures, and roles to embed the new skills into the organization. This includes training other individuals and managers in the new skills, adjusting processes and procedures to the new practices, and developing support systems.

#### **Step 6 – Organizational – Implicit – Controlled Environment**

The next step involves organizational learning. Like the original individual, the rest of the organization’s individuals will experience the same learning barriers. The belief system must be in place (the rest of the organization must see the benefits), and the various individuals across the organization must be given time to adapt their new skills to their environment, make mistakes, recover and learn from them.

Organizational learning generally progresses from the initial group or team outward. The initial team has experienced the benefits first-hand and has already learned new skills by their proximity to the initially-trained individual. Generally, the farther away a group or subgroup is from the original group, the more challenging the transition becomes.

## **Step 7 – Organizational Implicit – Organizational Culture**

Finally, as more individuals develop skills and practice them in different environments, the new practices become habits; they become the norms and routines of the organization – it becomes their culture.

## **Cultural Effects that Thwart Improvement**

The previous discussion presented the steps to enacting organizational improvement along with barriers that may occur as the organization attempts to improve. Here, we summarize common cultural effects of these barriers and offer solutions.

### ***Time Pressures***

Likely the most challenging of the cultural issues surrounding improvement, this issue has only worsened with the global environment and society's need for instantaneous satisfaction. Every organization is under time pressure and most organizations push employees to deliver fast.

My esteemed colleague, Ms. Kimi Ziemski highlights this issue in one of her most prevalent speeches, *The Tyranny of the Urgent*. For our purposes, this includes not allowing enough time for learning. Ironically, sending a student to a training class, then not allowing them the time to develop their new skills and recover and learn from mistakes, invalidates the learning, making it a waste of time.

Solutions include:

- Allowing sufficient time for skills development
- Allow time for mistakes, recovery, and additional learning
- Establishing support systems, including mentoring or subsequent training activities

### ***Uncontrolled and Dynamic Environment***

Environmental factors greatly affect a student's ability to develop their skills for complex tasks. Throwing a student "into the deep end" may work occasionally with savvy students, but more frequently overwhelms the student and thwarts learning.

Solutions include:

- Protect the student from too many new and unexpected environmental challenges. This can be done by the manager as well as other group or team members.
- Anticipate new challenges and allow the student to plan for them.
- Allow mistakes and make them a learning experience.
- Establish support systems, including mentoring, peer reviews, or subsequent training activities.

In projects, for example, a manager may decide to handle the more challenging stakeholders on behalf of the project manager. As the project manager's skills improve, the manager may allow him to handle more challenging stakeholders.

### ***Gradient Steps***

Individuals learn skills in gradient steps. A new project manager, for example, may be able to handle a small project with, say, 100 activities with two team members, but not a large project with, say, 1500 activities and 15 team members. Certainly, other gradient issues exist. Some examples include: level of political complexity, level of client cooperation, number and capabilities of vendors, degree of uniqueness of the endeavor (or project), geographical issues, and many more.

Solutions include:

- Control the size and complexity of the endeavor
- As the student improves, push for higher gradients as the student can handle them
- Establish support systems, including mentoring, peer reviews, or subsequent training activities

### ***Unaware or Unsupportive Environment***

Step 1 of our knowledge transfer model involves the individual's motivation and belief system. If a student is not motivated to learn, they will resist the learning. While savvy instructors can manage the individual in the classroom, when the student returns to their work environment, the same issues may exist in their management, team, and groups. In our scenario, we assumed a single individual was trained, implying the management and team to which they return were not trained. If the management and team don't understand the new activities of the student, or don't believe they will be beneficial, they will resist further learning for both themselves and the student.

This is a very common situation. While most managers and staff members are aware of the topic of project management, few realize the depth of complexity, degree of rigor, and level of knowledge needed to successfully run a project. As the student attempts to implement their new skills, managers and staff members alike tend to disbelieve the benefits or need for such activities, and so resist the actions.

Solutions include:

- Train the managers *first* to establish sufficient understanding and belief in the topic
- Train the entire team or group at the same time
- Allow experimentation
- Conduct peer reviews

## **A Brief Organizational Change Model**

The previous discussions lead us to a model for affecting organizational change. It is beyond the scope of this paper to present this model in its entirety. More complete presentations will follow in subsequent papers. However, we offer an overview and rationale of the model here.

This model is based on multiple works and decades of experimentation and experience. Some works include: Douglas McGregor's presentation of Theory-X and Theory-Y (McGregor, 1957), Maslow's hierarchy of needs (Maslow, 1943), Flamholtz and Randle's presentation of organizational culture (Flamholtz & Randle, 2012), Chen's presentation of knowledge transfer (Chen, 2010), Hamilton and Bender's presentation of project risk management and senior management optimism (Hamilton & Bender, 2015), and many others.

### ***Step 1: Establish the Need***

The first step in any endeavor involves establishing the need. People are unlikely to change if not motivated. One esteemed colleague, Dr. Zoe Quan notes in her developing thesis, the *Dimensions of Impetus*<sup>TM</sup>, motivation for change involves three elements:

1. Degree of Awareness (recognizing the ability of the change to cause improvement)
2. Degree of Propinquity (recognizing that the change will have an effect in the immediate environment)
3. Degree of Exigency (recognizing that the change will have an immediate effect)

### ***Step 2: Train the Managers First***

This step allows the managers to both understand the impact the change will have on the group/team as well as allowing them to create a supportive environment as outlined above. Key goals for this training include:

- Recognizing the time considerations needed to support learning, mistakes, and recovery
- Developing mentoring and subsequent training systems
- Protecting new learners from unexpected and complex environmental factors
- Developing a gradient scale system that initially supports success and to allow growth

### ***Step 3: Train the Entire Group/Team Collectively***

This action establishes common beliefs and skills across the group and team. While each member of the group or team will develop different skills at different rates, each can seek mentoring or council from others within the group or from the manager. Mistakes will be readily accepted (at least within the group/team) and quickly recovered, reducing the learning curve while allowing continued growth.

Key issues to improve learning:

- Ensure the training allows sufficient time for students to develop skills
- Align the training with the organization's existing culture (to the degree possible)
- Align the training with existing issues and needs

The size of the team or group is not important. We have successfully developed teams as small as four and as large as over 600. Certainly, the latter offers greater challenges and stronger management knowledge and structure.

#### ***Step 4: Continued Support***

This step involves two sub-steps.

1. Create an implementation plan
2. Start implementing the new skills

The first sub-step takes remarkably short time and need not be perfect. Depending on the size of the group/team, a one-hour meeting with managers and group/team will usually suffice, although add-on activities may follow. One of the benefits of having the group trained collectively is that they will experience a learning curve together, so mistakes are accepted – this includes mistakes in the implementation plan.

Deliverables for sub-step 1 may include (but are not limited to):

- Establishing environmental controls (assigning responsibilities for handling difficult stakeholders to the manager, for example)
- Drafting initial tools, forms, and procedures
- Establishing mentoring systems and protocols
- Establishing review and further learning initiatives (peer reviews are excellent here)
- Establish and align reward systems

Sub-step 2 involves actually implementing the changes. Key foundations that aid and reduce learning curves include:

- Encouraging use of draft forms and procedures
- Frequent and planned peer reviews
- Cross-mentoring/cross-training
- Supplemental training systems
- Acknowledging and rewarding successes

## Summary

Affecting organizational improvement is one of the (if not “the”) most difficult challenges a manager faces. Culturally, we send someone to a training class and instantly expect results. While this may occur with knowledge-based training, skills training, especially with complex activities, is more involved and takes more time. Understanding the barriers, complexities, and tools available enables managers to quickly affect improvement with a minimum of risk and pain.

In this paper, we present a methodology for effecting organizational improvement that accounts for many of these challenges. In future works, we will examine these in further detail.

### ***May all your projects be successful!***

Michael B Bender, MBA, PMP, CSM  
*The Value Strategist*  
President, Ally Business Developers

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