

**Getting Senior Executives to buy into project methods, a case study**  
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**Introduction**

Globally, more has to be done to create an awareness of project management's true potential and value at a strategic level. Project management professionals don't exist in a vacuum, they work in organizations, and they must convince their managers about the value of project management. Depending on the maturity level, organizations react differently to the project management movement. During the last ten years, I have observed the evolution of the profession worldwide, and I have found that one of the keys to gaining project management acceptance is to spend some time explaining the meaning of project management to executives. However, upper management is hardly available and ready to listen to you.

Some years ago, I was part of an international team at a multinational company in Spain that implemented project management offices (PMOs) worldwide inside the organization. The program manager made an extraordinary effort explaining to the management team how the project office adds value to project team members, to the organization, and to customers, and provides visible signs of management commitment, competent team support, and improved project and organizational performance.

This paper explains how the project manager was able to sell the advantages of project management to upper managers in their organization, the problems and obstacles he found, and the persistence he used to overcome them.

**Background**

The Spanish Project Office arose from the need to relieve project managers of administrative tasks associated with managing a customer project. Our consulting organization believed the Project Office should help the project manager improve his efficiency, facilitate getting the right tools, and align services with the needs of the project environment.

At the beginning of the project we ran a survey to determine how well the organization supported Project Management. Sixty five percent of the people answered the survey. The results were that we had no holistic view of our project portfolio, as well as lack of knowledge (reuse culture), no consistent approach for complex projects, poor scope management, bad risk identification, lack of Sponsorship, and project closing delays. The results of the project portfolio analysis demonstrated that we needed to go into more depth in the findings for each project. To achieve that purpose we began to study the project life cycle of our customer projects in order to know what to review, how to do it and when, and to find out who should be involved in that process.

However, most of management in the organization believed the PMO was only helpful for the project managers, not for them. They believed the PMO was a tactical mechanism to be used by tactical people, the project managers. They couldn't imagine how the PMO could help and provide an immense business impact. I must tell you that none of the managers in the organization had managed any project in their professional career. They were unaware of what the daily problems and issues managing a project were, because they hadn't done it before.

The general manager's orientation was sales. He wasn't a solution oriented person and didn't understand that project managers need time to define and plan the projects before they are executed. The other managers in the organization followed the same approach.

**Executives expectations (The Analysis)**

Most managers in the organization believed the PMO would be the vehicle to solve all organizational ills, and I demonstrated that the PMO helped monitor all projects to find most of the mistakes and discover areas where project

culture was weak. One key area of improvement was the “lack of executive support”. People who have never worked on a project have some difficulty in understanding that in order to achieve project success, the project manager must be supported by the organization. It took close to six weeks to convince the management team to move forward with the PMO project.

Why do we need a Project Office? I explained to the management team that a Project Office adds value to project team members, by providing mentors, consultants, training, and tools so they can be more effective. The Project Office adds value to the organization, providing a culture shift to project management, reusable tools and techniques, document and methodology support, global recognition, profitability improvement, and quality support. And the Project Office also adds value to our customers, providing visible sign of organizational commitment, competent team support, and more effective and quick answers. The key to getting upper management support at this point was to show how the PMO would solve current problems and provide immense business impact. A complete business case was presented in the language and format of “management think”.

The next question from the project sponsor was “what would be the cost of implementing and running a PMO?” I argued it would not be cheap, but the cost of maintaining a PMO could be less than or equal to the cumulative cost of conducting project efforts without such an office. A major feature of a PMO is that it would allow for a comprehensive approach to PM and it would be paid for itself very soon.

Finally I got management agreement about the mission and objectives for this project. Some discussions were kept between the management team and myself in order to achieve this agreement because they perceived the PMO as a bureaucratic organism. I demonstrated to them that we had more and more projects; we still had a lack of knowledge about project management and although the number of people working on projects was growing those people didn’t have experience in project management.

I collected data about the "running projects" and showed their deviations at management meetings. Auditing some different type of projects I showed the lack of scope and risk planning, pinpointing the "cost impact" for the organization. I demonstrated that most of our projects didn’t have a formal sponsor identified, and I explained about the effect this had on the organization. Making a presentation to the management team, setting clear expectations, and deliverables to start up was key for the “project go decision”.

The PMO stakeholders were the managers of the business and solutions that influence both end users and upper managers. Through a stakeholder analysis, I was able to determine how different individuals influence decisions throughout the project. The process I followed was to identify project stakeholders and classify stakeholders as “Sponsor, Advocates, Objectives, Agents and Neutral”. This kind of analysis helped me understand the levels of concern and authority of the management team, and how those behaviours or patterns influence the delivery of results by project managers.

The matrix on the following page shows the Stakeholder Assessment I did. Each column is divided into two more columns which attempt to identify the level of power/influence every stakeholder has regarding his/her position in the organization, and the level of interest or impact he/she has regarding the project (technical or social impact). I redid the Stakeholder Assessment using this tool every quarter during the project life cycle. It was very curious to see the movements of the stakeholders to different places in the matrix.

### Stakeholder Worksheet

| Stakeholder      | Power               |                             | Level of Concern |           |        |              | Support / Resistance |
|------------------|---------------------|-----------------------------|------------------|-----------|--------|--------------|----------------------|
|                  | Influence of Others | Direct Control of Resources | Y Axis Score     | Technical | Social | X Axis Score |                      |
| Eduardo Redondo  | 5,0                 | 3,0                         | 3,8              | 3,0       | 5,0    | 4,3          | 1,0                  |
| Antonio López    | 4,0                 | 5,0                         | 4,6              | 3,0       | 5,0    | 4,3          | 5,0                  |
| Javier Reyes     | 4,0                 | 3,0                         | 3,4              | 2,0       | 3,0    | 2,7          | 4,0                  |
| Ana Martinez     | 5,0                 | 5,0                         | 5,0              | 5,0       | 2,0    | 3,1          | 3,5                  |
| Federico Ter     | 5,0                 | 5,0                         | 5,0              | 5,0       | 2,0    | 3,1          | 1,0                  |
| Julio C. Minolte | 5,0                 | 3,0                         | 3,8              | 3,0       | 2,0    | 2,4          | 1,0                  |
| Joaquin Minguez  | 4,0                 | 3,0                         | 3,4              | 1,0       | 1,0    | 1,0          | 1,0                  |
| Elena Gómez      | 4,0                 | 5,0                         | 4,6              | 1,0       | 3,0    | 2,3          | 2,0                  |
| Iñaki Prados     | 3,0                 | 5,0                         | 4,2              | 1,5       | 4,0    | 3,1          | 1,0                  |
| David Tejares    | 5,0                 | 5,0                         | 5,0              | 4,0       | 3,0    | 3,4          | 4,0                  |
| M. Angel Juarez  | 3,0                 | 1,0                         | 1,8              | 5,0       | 4,0    | 4,4          | 2,0                  |
| Javier Jurado    | 3,0                 | 2,0                         | 2,4              | 4,0       | 4,0    | 4,0          | 4,5                  |
| Alberto Bello    | 3,0                 | 2,0                         | 2,4              | 3,5       | 3,0    | 3,2          | 3,0                  |
| Agustin Viana    | 3,0                 | 2,0                         | 2,4              | 4,0       | 3,0    | 3,4          | 1,5                  |
| Antonio Gonzalez | 3,0                 | 2,0                         | 2,4              | 1,0       | 3,0    | 2,3          | 2,0                  |
| Carlos Beltrán   | 3,0                 | 2,0                         | 2,4              | 3,0       | 4,0    | 3,7          | 3,5                  |

Exhibit 1

The ideal situation would be to have all the stakeholders located in the upper right corner of the next matrix (Exhibit 2). That situation would mean that all project stakeholders would completely support the project. It wasn't true at the beginning, but it was changing dramatically after the first six months. Managers appreciated more and more the advantages of the PMO.

### Stakeholder Assessment (PMO Project)

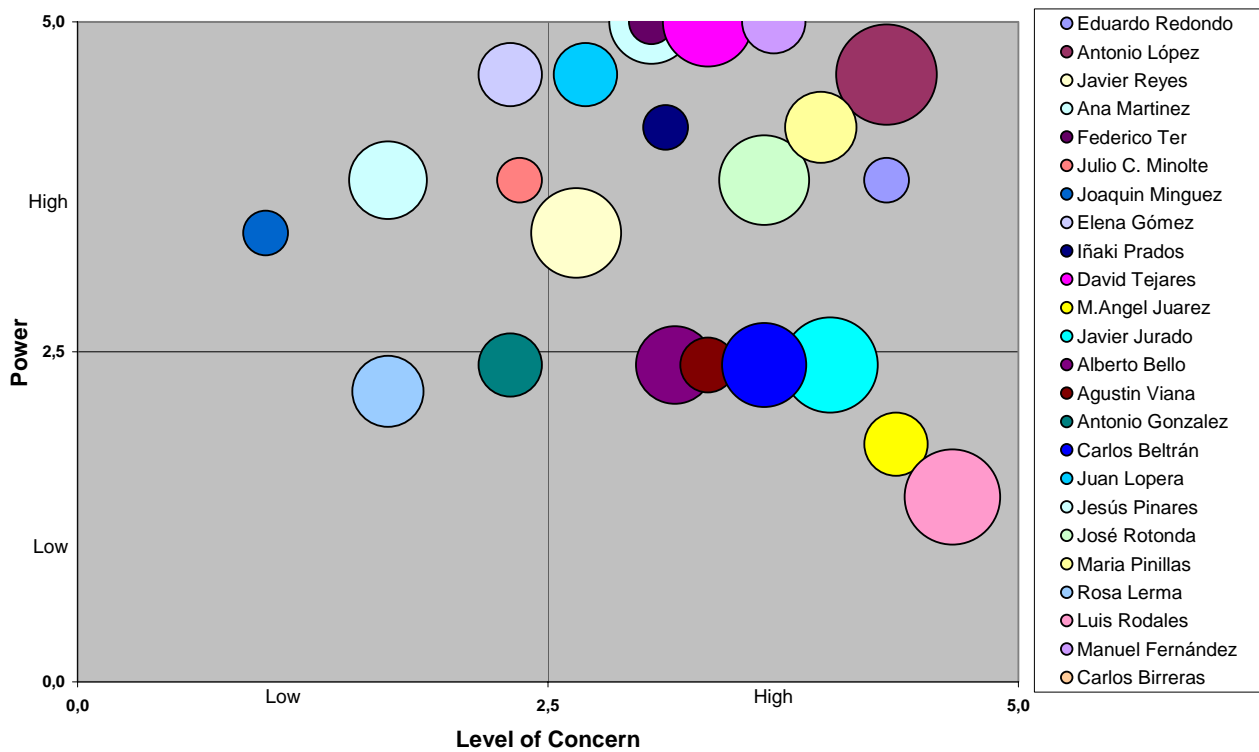


Exhibit 2

A short-term business orientation is not compatible with a project-oriented business approach. Projects need to be planned and implemented, project managers must be trained, mentored and coached, and projects need sponsors.

Organizations by their nature are political. The word “politics” is derived from the word “poly”, meaning “many” and the word “ticks”, meaning “blood sucking parasites” (source unknown). Managing politics during the PMO project was not easy, because the attitude of some people was negative. Some managers only managed “win-lose” situations and they didn’t know what was happening in the project; as a result they tried to manipulate the situation to their benefit.

### Selling project management to executives (The action plan)

Most organizations are focused on training project managers and project leaders in project management, but only a few spend time and effort explaining project management to executives. Most upper managers believe project management is something tactical and relevant to project managers only. I spent some time delivering short talks and workshops speaking the language that upper managers understand, talking about profit, strategy, goals, and how to get better results. For example, I attended all management monthly meetings and presented the results of project reviews to executives. The trick was to explain the results in order to show them there was a lack of sponsorship. The recognized benefits through the actual project management vision strategically improved the company’s value and profitability.

I had several face to face meetings with consultants, project managers, and managers to verify the initial scope. In the

table below you can see the different type of meetings. These meetings were extremely valuable. Getting these people involved from the beginning was the only way to convince them to use the Project Office.

### **PMO Meetings**

| <b>Meeting type</b>           | <b>Attendees</b>                          | <b>Presenter</b>           | <b>Duration</b> | <b>Preparation effort</b>               | <b>Material delivered</b>             | <b>Objective</b>                                      |
|-------------------------------|---|----------------------------|-----------------|---|---------------------------------------|---|
| Management meetings           | Management team                           | PMO lead                   | 1 hour          | 2 hours preparing strategy and material | Slides copy and PMO white paper       | Inform and get upper mgmt. commitment                 |
| PM meetings                   | Project Managers                          | PMO lead                   | 2 hours         | 4 hours preparing material & examples   | Slides copy and PMO proposed services | Share plans and ideas & ask for feedback              |
| Presales consultants meetings | Senior Consultants in presales activities | PMO lead & PMO coordinator | 1 hour          | 3 hours preparing material & slides     | Slides copy and presales PMO services | Share information and ask for feedback and validation |

These meetings were done on a monthly basis and were the key for scope verification and management. All the time invested preparing and running these types of meetings was very helpful along the PMO implementation. Those meetings were not very successful at the beginning. As upper managers didn't have enough time to attend those meetings, I convinced upper management to be trained in sponsorship. I was able to demonstrate that, although the project sponsors were not active members of the team, they were a resource that served as motivator and barrier-buster.

I used passion, persistence, and patience to sell project management to executives. I was, and I am, a project management believer. I showed passion explaining to executives how important they were for the project success and how valuable they were for the project manager and the project team during the project life cycle. Also I urged them to understand that it was very important for the executive to be "snoopy", that is, to be proactive and ask project managers and project team members for project information.

### **The follow up and implementation (The Execution)**

Management people expect short time results. The trick is to provide them with small but tangible results as soon as possible during the project. Getting senior executives involved in project methods was not easy, but I used some helpful methods. I involved executives in project reviews, explaining to them the value of those reviews as a method of learning for executives and project managers in order to manage their projects better.

One of the most important contributions of the PMO was the sponsorship training. Sponsorship is a commitment by the upper management and leaders to support and be involved in major projects and initiatives from the start to the end. However it was not easy to convince upper managers to be trained in sponsorship. I asked them to prepare a list of the projects they were involved in, including the name of the project manager and the project status.

The results were a great help for me. More than 70% of the managers asked didn't have enough knowledge about the project status, project problems, and issues and, most important, about the customer. It was curious, they were measured by customer business generation and they didn't know their current customers. The general manager of the organization asked them to attend the sponsorship training and he attended, too. Finally, fifteen managers attended the training.

The training was focused on:

- Project sponsorship. All the projects need a sponsor. In large and complex projects, project sponsorship became critical
- Project sponsor key responsibilities and definition
- Project sponsor assignment and the need to be empowered by all businesses
- Establishing measures for project sponsors
- Understanding and positioning client cultures
- Commitment and ownership

After the training, executives understood that sponsorship skills acquisitions have a direct impact on the project performance and also that it can be a new business generator. During the training, attendees agreed on an action plan to be implemented in their customers. The PMO monitored the implementation of those plans providing a follow up with the general manager.

That training was very helpful for the executives, but also for the whole organization because people felt more and more comfortable speaking the truth to upper managers. Executives felt more part of the team and started to understand the meaning of project management as a philosophy for the whole organization.

### **The Process**

The project was nineteen months long. I followed the next steps to get executives to buy into project methods. If you want to sell project management to your executives in your organization, you should:

1. Identify project stakeholders: Run a stakeholder's assessment and identifying who is who in the organization. Qualify the degree of concern and authority of every stakeholder.
2. Assess stakeholder's expectations: Finding out all the stakeholder's expectations and clarifying the project scope to them.
3. Prepare an action plan: Determine what to do to satisfy the stakeholder's expectations and how to get them on board. Which training must be delivered, think about meetings, politics, etc.
4. Execute the plan: Execute the actions in your plan and follow up on the results.
5. Learn from the results: Do a retrospective analysis and learn what was well, what didn't go as well, what we learned and what needs to be changed for the future

The stakeholder assessment must be repeated from time to time during the project life cycle, in order to be sure the stakeholders' expectations are met.

### **Critical success factors**

If you, as project manager, want to get senior executives to buy into project methods you should:

- Speak the truth to power. Say what you believe and act consistently with what you say.
- Speak the language management understand (results, tangible things, ROI,etc).
- Spend some time training executives in Sponsorship.
- Do face to face meetings to validate stakeholders' expectations.
- Use your passion, persistence and patience.

### **Results and lessons learned**

Selling project management to executives needs time and effort as they need to be trained and talked to. Most of the managers in this case study hadn't worked as project managers before they became managers, so they needed to be explained what the main characteristics of the project manager's job are.

Politics are alive in every organization. Identifying and assessing project stakeholders was very helpful in understanding who is who and to create an action plan.

After the Sponsorship training, we needed to follow up on the managers' action plan to achieve good results. Project retrospective analysis, and project quality reviews were quite useful in getting managers more aware of project

management.

During the last three years, I have helped other organizations sell project management methods to executives. I have observed that the lessons learned in this paper are applicable, too. Selling project management to executives is dealing with power.

There are some key messages:

- Remember that organizations are political by nature.
- Be aware that effective project managers become politically sensitive.
- Learn the elements of a political plan that addresses critical stakeholders, power structure and areas of focus.
- Turn potential victim scenarios into win-win political victories using this approach, examples and insights.
- Speak the truth to power.

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