

FEATURED INTERVIEW – NOVEMBER 2007
(Part 2 of 2 part interview with PM World Today)

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<http://www.pmworldtoday.net/interviews/2007/oct.htm>



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*Editor's note: Max Wideman is a retired Canadian professional engineer and project manager with experience in systems, social and environmental projects, as well as design, engineering and construction projects. He is a Fellow of the Project Management Institute, of which he is past president and chairman, and for whom he developed the 1987 version of the Project Management Body of Knowledge. He also enjoys Fellow status in the Institution of Civil Engineers (UK), the Engineering Institute of Canada, and the Canadian Society of Civil Engineering. Max has lectured or presented papers in eleven countries and has contributed books, chapters, papers and articles on many project management topics. His latest book is A Management Framework for Project, Program and Portfolio Integration, Trafford, BC, 2004. Comprehensive coverage of project management theory and practice can be found on his web site at <http://www.maxwideman.com>. The interview below was conducted over the last few months by David Pells, managing editor of **PM World Today**. Part I appeared in the October 2007 edition of PM World Today.*

PMWT: How and when did you get involved with the Project Management Institute?

Max: In late 1973 I joined a vertically integrated forest products company. "Vertically integrated" means that they sold their own products to themselves down through the manufacturing chain until the products finally came out at the end as retail consumer goods. That is, from raw logs cut from the woodlands, through the pulp and paper mills, to finished paper and on to final retail products like copy and printing paper, wall paper, paper cups, paper hand towels and the like. The company was planning on going on a project development binge in the heady days of 1974 and decided to install a project management group responsible for identifying and developing major upgrades and new production facilities.

So, these were exciting times, but the first job was to figure out how to do project management and develop some policies and procedures. We hired a project management consultant of the day to do this task, but in order for us to understand what he was talking about he recommended that several of us join the Project Management Institute ("PMI").

So, I joined PMI in 1974 only to discover that they, too, were still learning the business. So, I brought my previous construction experience to bear to help the whole show along.

In those days, a majority of the PMI membership were from the engineer, procure, and construct industries, although there was a healthy pharmaceutical group who generally kept aloof from the construction gang. But interestingly enough, I was probably one of the first to recognize the wider applicability of the techniques that we were identifying and their range of coverage in terms of knowledge areas. In short I could see the broader applicability to administration, finance and systems engineering projects, now more popularly referred to these days as "information technology".

And the rest, as they say, is history.

PMWT: Were you involved in the founding of the West Coast BC chapter of PMI? How did that come about?

Max: Actually, I was the founding chapter president of the West Coast BC Chapter of PMI that was launched in 1979. An excerpt from our first published Annual Report for the year 1983-84 reads as follows:

History of West Coast BC Chapter

It was at the October 1978 PMI Seminar-Symposium in Anaheim, California that a group of delegates from British Columbia first met to discuss the formation of a local chapter. Following this meeting R. Max Wideman obtained a list of PMI members in British Columbia and adjoining regions of the U.S. Additional names were canvassed from business associates and, in February and March 1979, a letter went out to 150 persons to solicit their interest in forming a British Columbia Chapter. There was a strong response to the mailing. On 29 May 1979, a first meeting was held with those persons who had offered to serve on a steering committee.

The steering committee met twice more through the summer. Its efforts culminated in a successful inaugural meeting on 12 September 1979 with 52 persons attending the meeting in the University of British Columbia Graduate Student Centre. The meeting approved the intention to form a Chapter and accepted the constitution and bylaws. A Board of Directors was elected from those who served on the steering committee. Max Wideman was selected to be president.

A formal application for a charter was submitted to the PMI Board of Directors on 28 September 1979. At the Board's meeting of 18 October 1979, in Atlanta, the charter was granted. The Chapter was given the name "West Coast B.C." to distinguish it from U.S. West Coast Groups.

The chapter has had an interesting, if checkered, history. For a short while, it was even independent of PMI. This was due to various differences of opinion and how the relationship was handled resulting in a strong feeling that there should be a national Canadian project management organization. However, subsequent Chapter Boards became uncomfortable with not being an accepted part of PMI and buckled down under PMI's control requirements.

Many strong leaders have been a part of the development of the chapter in its 28 years of existence, too many to mention by name for fear of missing those whom I might have overlooked. Suffice it to say that in helping to formulate the basis of the Chapter, it was always my intention to "move on" as soon as possible to give others a chance to continue paving the way to the future.

In doing so, the most satisfying experience for me has been to see how people have come forward and blossomed in their careers as a result of taking on the responsibilities of president and Board membership. I believe that this is because of the opportunity to fly ideas, having to convince peers of those ideas, and experiencing the stress of facing public audiences - all without fear of "messing up" and risking the wrath of an employer.

By the way, that excerpt I quoted above was not written by me!

PMWT: When did you serve on the PMI Board of Directors, and in what roles?

Max: I was first elected to the Project Management Institute's Board of Directors as VP member Services in 1983. At that time Dr. **John Adams** was researching the attributes of a professional organization and how that would require establishing a body of knowledge that distinguishes project management from general management. At the same time, Past PMI President and Chairman, (the late) **Matt Parry**, had just completed his Ethics, Standards and Accreditation study known as the "ESA" report.

I remember well my attendance at the first Board meeting, immediately after the election, when these topics were discussed. With some temerity, I inquired if indeed the findings of the ESA report showed that the minimum requirements were in place to meet the minimum attributes being advocated by John. I was told that indeed that appeared to be the case. So I replied "Then what are we waiting for?"

This response evidently triggered a long train of events, from the sterling work done by Dr. **Lew Ireland** in developing the first database of Project Management Professional ("PMP") certification questions, to a landmark "invitation-only" workshop that I orchestrated at the 1984 PMI Seminar Symposium to expand and improve the Project Management Body of Knowledge that I tagged as "PMBOK", to the massive project management consulting and related web services of today – and, I might say, PMI's present resounding financial success.

Around 1984-85, the PMI Board established a PMBOK Standards Board of which I was chairman. After much diligent work with a team of over 80 PMI members, a large team to manage in those days (especially before the days of Email!), a formal Project Management Body of Knowledge (PMBOK) document was approved by the PMI Board of Directors on March 28, 1987, and promulgated to be effective for certification and educational program reviews as of September 1, 1987.

In 1985 I received PMI's Distinguished Contribution Award for my work and Person of the Year Award in 1986. In 1987 I won the election for PMI President followed by a year as Chairman in 1988. Interestingly, 1987 was a year of decision for me: Should I opt to take up the role of chairman of the PMI Standards Committee in order to continue my influence over the shaping of the PMI PMBOK, or take my chances at fame and (hopefully) fortune by running for PMI President. I chose the latter. I will leave it to others to decide whether or not that was the right decision.

PMWT: How many members did PMI have when you were president? What were the big issues for PMI at that time? Who else served on the board with you?

Max: This question is much more difficult. The best I can offer is as follows: I was first elected to the PMI Board in 1983 as VP-Member Services. At that time **Regula Brunies** was Chairman, **Ken Hartley** was President, **John Murphy** was VP-Chapter Activities, **Wayne San Filippo** was VP-Functional Operations and **Harvey Levine** was Secretary. **David Morton** was past-Chairman, Dr. **John Adams** was the Educational Director, Dr. **Terry Kinnear** was PMQ Editor in Chief and **Bonnie McGarr** was our paid Executive Director.

I remained closely associated with the Board in one capacity or another until 1988 when I completed my term as Chairman. During that time many people came and went in various capacities, for example: (the late) **Brian Fletcher** as VP-Chapter Activities (1984), Dr. **Gordon Davies** as VP-Finance (1984) and **Terry Anderson**, VP-Functional Operations (1984). **John Rollins** became VP-Finance (1985) and (the late) **Doug Egan** took over from me as VP-Member Services (1985).

In 1986 there was a sea-change and North America was segregated into three Regions: **Rod Dawson** became VP-Region I (i.e. Canada), **Patrice Murphy** and **Jenny Strbiak** represented Regions II and III respectively. **Al Badger** came on board as VP-Technical Activities. In 1987, taking over from **Brian Fletcher**, I was elected President with automatic elevation to Chairman in 1988. **Bob Yourzak** joined the Board as VP-Public Relations and **Larry Woolshlager** took over VP-Region II (1987). In 1988 **Jim Blethen** joined the Board as VP-Technical Activities, and **Fred Baker** became VP-Administration. **Warren Allen** and **Frank Jenes** represented Regions I and III respectively.

I must say that all of these people put in long hours working for the Institute and made remarkable contributions. Not that all was sweetness and light, Board members typically

held very strong views and were not well equipped in the art of consensus-building. Consequently, there were many times when I observed bitter exchanges. Now and again there might have been personal agendas at play for personal gain - but not often. We were concerned for the good of the members and PMI's financial viability.

In 1982, the membership of PMI was just over 3,300. There followed a significant upsurge with the spread of local chapters where more people could get involved and could see the benefits of local networking. By the end of 1988 at the end of my term as chairman, the membership had almost doubled to 6,200. We were on a roll.

What were the pressing issues of the day? They were many and varied, in fact, too many to recount, but likely typical of any Board responsibility. But I think always highest on the agenda was how do we best move forward within our limits of financial, staff and volunteer resources. The age of intellectual property copyright protection and aggressive product sales pitches had not yet been born!

PMWT: Max, you've seen PMI change a lot since then. In your opinion, what are some of the most significant changes affecting PMI since you were president?

Max: The answer to this question probably trespasses into sensitive areas so it will be important to stick to facts rather than opinion. Certainly, since I was president, there has been a sea change in PMI and two forces have dominated that change. The first is obviously the growth in "IT-type" projects spurred on by the evolution and enormous success of the personal computer and its application to business processes. As businesses in all domains discover the opportunities for process improvement in these rapidly advancing technologies, including of course the Internet, the number and complexity of these projects has ballooned.

What has changed in the project management arena as a result is that such projects are typically much shorter than "traditional construction-type" projects, generally involve less money per project, the products have a much shorter "shelf-life" so that products cycle through at much shorter intervals, and the number of stakeholders involved in the projects are typically larger in proportion to their size. But above all creation of the product requires intellectual effort (brain work) rather than muscle power (brawn work). All of this means dealing with two quite different types of people who respond to quite different styles of management. And because the PMI membership is now made up of a majority of "IT types" instead of "construction types" the focus of PMI member interest has shifted accordingly. And with it, I think it is fair to say that the PMI culture has also changed.

The second force is the shift in PMI organizational responsibility from the membership to the paid executive staff. As with all nascent organizations, PMI started out by being run entirely by volunteers. As the membership grew along with revenue, so did the need for bureaucracy and paid staff to handle it. Hiring professional association executives inevitably means introducing a struggle between the visions of a permanent executive and

those of a regularly changing volunteer Board membership. Understandably, it is difficult for an Executive to establish some degree of stability without exercising a degree of control over the organization. The perennial question is how much?

I recall that this issue was hotly debated on the Board many times as we worked our way through several Executive Directors. There were those, like myself, who wanted to see PMI leadership maintained by volunteers of stature, while others wanted to see a dominant paid professional in charge, one who would lead a parade that others could (meekly?) follow. Eventually, the other side got their wish. It is true that today we have a very flourishing PMI organization and, if numbers and financial strength are the criteria, then highly successful. The problem is that, short of a palace revolt, once members lose control they have probably lost it forever.

The reason is simple. The executive staff is more or less a fixture. The ostensibly authoritative Board is constantly changing. It is easy to convince new Board members of their responsibility to maintain the status quo; after all, it is a prestigious position to be a PMI Board member, a position not to be taken lightly. However, if a Board member should be so audacious as to advocate radical change, the Executive only has to wait it out and the Board member inevitably completes his or her term, and leaves.

As advocated by the Association of Executives, it makes logical sense to persuade an association Board to be responsible for long term planning, while the paid executive is responsible for day-to-day running of the organization. That does not mean that the Board should not pay close attention to how the organization is being run, indeed it has a fiduciary duty to do so. But for the reasons just noted, it is easy for the Executive to keep Board members fully occupied with long-term "strategic" decisions and, perhaps by other means, to simply persuade anyone who wishes to change operational direction, to stop meddling and to "mind their own business".

The irony of this division of responsibility between long-term strategy and short-term operations is that few Board members will ever be around in a position of accountability to ever see the results of their policy efforts. It is a classic case of responsibility without accountability.

So what is the significance of all of this? In my humble view, it is a sea change in the management philosophy of the organization. In the early days of PMI we struggled to identify and establish project management content of high value and to make that knowledge publicly available to all. Today, the knowledge and experience of PMI members is collected and cloistered under copyright and purveyed at a price. The consequence is that those with serious intellectual ideas to contribute are reluctant to do so for fear of being locked out from their own gainful efforts. The result is a degree of stagnation.

Hence, it seems to me at least, that quantity and proceeds trumpet quality and progress. Altogether, it is a sea change indeed.

PMWT: In your opinion, what are the two or three most important developments in the world of project management over the last twenty years?

Max: "The last 20 years" takes us back to 1987 or thereabouts and I take it that "most important" implies a higher frequency of success. If that is so, I find it difficult to pin point "important developments" since then because I am not convinced that there have been any unique developments in project management that would qualify. The 1980s was a decade of significant documentation of management that was uniquely devoted to the management of projects. That in itself could be described as an important development although the content that was document in various versions of "Bodies of Knowledge", or BoKs, was hardly unique. Most of the content was established decades, if not centuries, earlier.

Since then there have been various attempts to produce versions of the BoKs that are "new and improved". However, in my opinion these have simply led to more complex explanations of a management system that, while multi-faceted, should in fact be quite simple and straight forward. Much of this added complexity seems to stem from two causes: First, a failure to understand that managing the project, i.e. project management, and managing the technology of the project's deliverable, i.e. technology management, are two quite different things and must be documented and handled differently.

By the same token, it must also be recognized that project success, i.e. successful project management, and product success, i.e. the successful generation of benefits from the product, are also two quite different things. Still, both "managements" must proceed in lockstep for a project to be successful overall. Nevertheless, of the two successes, product success is by far the most important because the success of the *project* is transitory, while *product* success endures for the whole life of the product.

Second, there are the various attempts to appropriate and redraft standard people management practices into some sort of project management terminology-laden techniques. In this connection, the rapid spread of project management to the development of "new" technologies is indeed an important development. I am thinking here of the information technology area of project management application as one example in particular. This arena is generally fraught with a much higher level of complexity (e.g. more stakeholders to be satisfied) and is the result of more brain work (rather than brawn work). Also, the logical progression of the work is less evident. Finally, brainworkers respond better to a different style of management and hence the interest in "new" approaches to project people management.

One could point to project portfolio management as an important development in the world of project management. But this can be misleading since project management is a subset of project portfolio management and not the other way round. That is, project portfolio management takes place, or should take place, at a higher level in the management hierarchy. Indeed, project portfolio management is really a different

discipline, responding to different criteria, and conducted for a different purpose. That purpose is to optimize the resulting benefits to the organization rather than the narrower project management objective of producing a deliverable on time and within budget.

The bottom line is that, in my view, it is difficult to identify any development in project management in the last twenty years that has shown a significant improvement in the achievement of success in projects.

PMWT: What are the three most important traits or skills for project managers today?

Max: The three or four most important traits or skills for project managers today is an interesting question. We could look to the various project management associations for guidance. The Project Management Institute, for example, identifies thirty nine project management processes in its current 2004 Body of Knowledge. Each of these processes obviously requires specific skills on the part of the project manager to conduct successfully. So, although there is no doubt some overlap, that's thirty nine to choose from. A year earlier, Professor Crawford's Project Manager Role Model identified forty seven units to be managed, while the USA's National Competence Baseline, promulgated by asapm, encompasses fifty one elements in five competence areas. So, paring any of those down to just three or four is something of a challenge.

But perhaps it is not as challenging as it looks. The fundamental philosophy underpinning project management and justifying its existence is simply "Plan before doing". So the ability to plan successfully is obviously the first important skill. However, to get something done, you need people to do the "doing" and for that you need the skill to persuade people to do just that. And that, I think requires the third and ultimate skill, the ability to communicate effectively.

In short, without communication no one knows what to do, without motivated people there is no one to do anything, and without planning, no one gets anything done. So there you have it, the three most important project manager skills: Planning, Persuading and Promulgating (communication). Of course there are a lot of other desirable skills, but mostly they fall into subsets of these three.

PMWT: Who were your mentors? Which individuals have had the most influence on you and your professional career over the years? Perhaps just mention a few.

Max: Ah, yes, mentioning names is a dangerous exercise, because there will be those that are offended because they are not mentioned as well as those who are offended because they are! Further, I have had more than one career, so I presume that we are talking here of my project management career. Thus I think I'll play it safe by confining my remarks to those whom I hope to meet in the next world.

First and foremost, I think of (the late) Dr. **Linn Stuckenbruck** because he was the editor of the first book to be published by the Project Management Institute by various well-

known authors (including himself): "The Implementation of Project Management". Then there was (the late) Dr. **Dean Martin** who I thought had, from his experience as a contracting officer, a sound practical grasp of what it takes to run a project and get to where you had to get. Both contributed a lot of sound ideas that contributed to my understanding of project management.

(The late) **Matt Parry** was unique in that he laid the foundation for PMI's reason-to-be through his landmark ESA report. This report, titled "Ethics, Standards and Accreditation" included the first elements of project management knowledge that I was later given responsibility for developing further into the original PMBOK document.

Next up would be (the late) **David Curling** who established the original PMForum web site disseminating independent news and thoughts about project management around the world. For many years he twisted my arm to write essays for publication and we edited each others work. (The late) **Dick Balfour**, another colleague, had very abstract and sometimes abstruse ideas, but nonetheless thought-provoking. He was passionate about seeing Canada represented on the world stage by its own project management organization, a vision that has not yet come to pass.

(The late) **Doug Egan** and (the late) **Brian Fletcher** were both close friends with very strong opinions, not only about project management, but also about how an organization like PMI should be run. We used to fight over the details, but it was all good natured.

PMWT: Now the big question, where is project management headed? What does the future of project management hold in store? Where will it be in 5, 10 or 20 years?

Max: Surprisingly, in the short term I don't think that is such a difficult question to answer. In the long term it is more problematical. No matter how much I polish my crystal ball, it's pretty fuzzy around the back. Maybe I need a crystal ball upgrade?

In the shorter term, that question was answered in a very perceptive presentation by David Cleland about ten years ago at a PMI Seminar/Symposium (to the neophytes, that is a "PMI Congress"!) David observed that every preference, fashion or technology goes through a life span that takes the form of the classic S-curve. It starts off slowly, gradually gathering momentum, travels at its highest speed for a while and finally slows down, withers and dies - as some new, new idea takes its place, following exactly the same pattern.

We've seen this in the stone age, followed by the bronze age, the iron age and now the plastics age and so on. Exactly the same can be said of strategic concepts like management and project management. Right now, project management is clearly on a roll. About twenty years ago, when the membership of PMI was around 6,000, I publicly predicted, based on some mathematical projections, that the potential membership peak would be around 450,000. Today, PMI is only half way there, so obviously PMI still has some way to go.

But it is time to see something new emerging. And in fact, I think we do. We see the rise of project portfolio management. Try as hard as some might, to see project portfolio management as an extension of project management, in fact it is the other way round. Project portfolio management will subsume project management - at least in the burgeoning field of information technology projects. Anyone who disputes that should first read my recent paper on the subject of project portfolio management and examine the project portfolio management life cycle (and, yes, I do mean "cycle!") You can read it here: http://www.maxwideman.com/papers/ten_step/intro.htm

So, I don't think we'll ever see project management as a legally and publicly recognized "profession", though people engaged in project management will undoubtedly be expected to act professionally. But as Dr. Paul Giammalvo has so clearly demonstrated, project management is simply a craft, a discipline. That news will be bad tidings for some, but let's not kid ourselves.

My trusted crystal ball is also displaying a lot of other things, but they are only indirectly related to the topic of project management. Rather they are pointing to significant things like changes in political power, changes in population numbers and even changes in how we apply our economic concepts, to say nothing of religious attitudes. These will create a very different world from the one we live in today. There will be great shortages, particularly of land and fresh water and, as a consequence, even greater strife in the world. Conditions that cannot be realistically solved by technology, let alone project management!

And in the mean time, project management will simply become one of our important life skill for about 60% of the population. The other 40% will continue to muddle along as usual.

PMWT: Max, you are widely considered one of the world's true project management experts. Your reputation is well deserved. You've experienced many projects, from various perspectives. You've studied project management for decades, made many important contributions, participated in numerous professional meetings, etc. Now, after all that, what would you say to a young person just getting started who is interested in making project management his or her career path?

Max: That's very nice of you to say so, but let's not get carried away, here. Interestingly, I frequently get asked for my advice about getting into project management, such as "How do I get started?", "Where can I find out more about it?", and so on. And that's not necessarily from "young" persons; I get the questions from all ages - especially from people considering a career switch. I would say that before getting into project management, you do need to answer an important question: "Are you suited to project management in the first place?"

So, for those in, or entertaining the idea of getting into, project management, it is very important to establish whether you are really cut out for it. By my reckoning, some 30% of the working population is not suited to project work of any kind and those people should seek careers elsewhere. For the rest, the work is exciting, satisfying, and full of opportunities.

But people must recognize that project management is stressful and the stress level varies throughout the project life span and as you move from one project to the next. You cannot always expect to have a steady stream of projects to keep you busy and handed to you on a plate and, equally important, you cannot expect projects to come to you. The world economy and its projects are simply not like that. Most often *you* have to go *to* the projects so that means you must be prepared for a flexible life style. It also means you have to take charge of your own career, a good idea anyway, and be quite clear on where you want to go. As in any project, it will not always work out the way you had hoped for, but having a good plan is a big help.

Getting into project management is not so easy either. Of course, you can take all kinds of project management courses, but that doesn't necessarily get you a job because most project manager jobs understandably require previous experience - so you're in a catch twenty-two situation. If you are serious about getting into project management, the first step is to get yourself into an organization where the probability of becoming associated with a project as a team member is quite high. If you are already employed in such an organization, then let management know that you want to progress in that direction. Management always likes to see enthusiasm amongst its employees.

If you are not in that fortunate situation and would therefore need to make a switch in employment, then before you do so, I suggest that you seek out some voluntary organization where you can get some experience on a project team and hopefully soon get experience in actually managing a project. If you are in an area where there is a local chapter of a project management organization, then you are in luck. Join it and roll up your sleeves, you will not only get a chance to "do projects" but also network with others with similar interests who can tell you what's going on in the market place.

Never mind whether or not you get paid for the project work, the experience becomes one of your permanent valuable assets. It resolves two issues: the first is whether or not you are cut out for project management, and the second, something positive to put on your resume. And so I would close by saying: If you are comfortable with all of that, then go for it. As I said, the work is exciting, satisfying, and full of opportunities!

END OF PART II

Please see Part I of this Feature Interview with Max Wideman, in which Max answers questions about how he got started in project management, some of his early project work, and his most memorable project experience. Click on following link to read part 1 of max's interview with PM World Today.

<http://www.pmworldtoday.net/interviews/2007/oct.htm>

For more information about Max Wideman, or to contact him, visit www.maxwideman.com. His personal profile can also be found at <http://www.pmforum.org/pm%20forum%20team/advisors.htm#3>.