

Project Managers as Senior Executives

Guidelines For

(1) Arranging and Preparing for CEO/SE Interviews, and (2) Conducting Face-To-Face Interviews with CEOs and Other Senior Executives

1. ARRANGING AND PREPARING FOR THE INTERVIEW

Arranging the Interview Appointment: Obviously it is necessary to arrange an interview appointment with a CEO or other Senior Executive well in advance through the appropriate channels of the organization. This may be done through telephone, mail, or e-mail contacts. A suggested message to be used in this process is given in Appendix A. It is usually of great importance to have the recommendation of someone known personally to the CEO or Senior Executive whom you desire to interview in order to reach that person or their personal assistant or secretary.

What Information to Send Ahead to the CEO/SE: In order to inform the persons to be interviewed of the purpose and nature of their interview, it is recommended that the information listed in the suggested message requesting the interview be forwarded to them at least one week prior to the scheduled interview appointment:

- The purpose and scope of the interview as described in the suggested message (Appendix A.)
- The Research Project Brochure (Appendix B.)
- The List of Interview Questions (Appendix C.)
- The Questionnaire (Appendix D.)

Information Gathering: Prior to each CEO or Senior Executive interview it is important to gather as much pertinent and available information that is possible and feasible to obtain about the person to be interviewed and their organization. The most essential information is indicated in the form presented in Appendix E. Most of this information can be obtained from the organization's annual reports and other stock exchange documents for publicly owned companies, and from public sources for governmental agencies. In many cases this information can be obtained via Internet searches. Gathering this information prior to the interview will show respect for the valuable time of the CEO or Senior Executive and will improve the quality and results of the interview itself.

2. CONDUCTING THE CEO/SENIOR EXECUTIVE INTERVIEWS

The recommended interview format consists of two parts: The first is an open exchange, including a brief explanation of the research project and how important these CEO/SE interviews will be to producing useful research results, and then will focus on a series of written questions to which the CEO/SE will respond verbally. The responses to these questions may in turn elicit further related questions to elaborate on particular points. The second recommended part of the interview is to ask the CEO/SE to complete a brief written questionnaire that will provide their opinions about the relative importance of particular personal attributes or characteristics and roles for Senior Executives compared to Program and Project Managers. A duration of about 1 hour should be planned for each interview.

PART 1 OF THE INTERVIEW

Explanation of the Research Project and Purposes of the CEO/SE Interviews:

- Describe the project objectives – See the Research Project Brochure.
- Explain the need to:
 1. Understand the influence of project management/PM in the development of the CEO/SE's career.
 2. Identify which PM competencies are useful in exercising the CEO/SE's responsibilities.

Guidelines for CEO/SE Interviews

3. Obtain the CEO/SE's opinions about the status and importance of PM within their organization.
4. Compare the realities and opinions about whether experience as program/project managers leads to senior executive positions within their organization and industrial (or governmental) sector.

Interview Questions: The questions to be posed to the CEO/SE are given in Appendix C.

PART 2 OF THE INTERVIEW

In this part of the interview the CEO/SE will be asked to complete the written questionnaire given in Appendix D. This consists of their entering the relative ranking of a number of personal attributes or characteristics plus a list of roles for CEOs and project managers. We recommend that the interviewer remain with the person being interviewed during this stage in order to be available if any questions arise regarding the wording of the questionnaire. The CEO/SE may prefer to complete this questionnaire on their own, perhaps at a more convenient time, but that case arrangements must be made for retrieval of the completed questionnaire on a timely basis. This can be rather difficult to obtain the results later.

DOCUMENTING THE INTERVIEWS

- The interviewer should prepare legible, clean notes during the interview and should prepare a typed, cleaned-up, and well-organized set of notes as soon as possible after the event.
- If possible, it is desirable to record the interview and prepare a transcription of the recording.
- Summary notes and conclusions, the interview transcript (if recorded and transcribed, or just the recording if it is not feasible to transcribe it), the completed Questionnaire, and the copies of the information described in Appendix E should be transmitted via courier service to:
Dr. J-P Debourse
Ecole Supérieure de Commerce de Lille
avenue Willy Brandt
59777 EURALILLE
France
tél: 33(0)3 20 21 59 62
within 10 days of the interview.

LIST OF APPENDICES

A. Suggested Letter or E-Mail Message Requesting the CEO/SE Interview

B. Project Managers as Senior Executives Research Project Brochure

C. CEO/Senior Executive Interview Questions

D. Questionnaire: Relative Importance of Unique PM Skills and Similar Senior Executive Skills (2 pages)

E. Information About the Person to be Interviewed.

**SUGGESTED LETTER OR E-MAIL MESSAGE REQUESTING
CEO/SE INTERVIEWS**

[Letterhead, if hard copy; preferred, and best sent via courier service]

[Name, address, and appropriate salutation]

Subject: Request for Interview for an Important Project Management Research Project

The worldwide Project Management Community will be most grateful if you can be available to be interviewed for an important research project related to project management. Your participation in this project has been highly recommended by *[enter name and title of individual, preferably someone known to the person receiving this letter]* and I earnestly hope that you will give this request your favorable consideration. We believe that this will take about 1 hour of your valuable time.

The project is titled “Project Managers as Senior Executives?” and is co-sponsored by the Project Management Institute and the Ecole Superieure de Commerce/ESC de Lille, France. This project is investigating the premise that experience as a program or project manager is desirable and useful as preparation for assignment as a Chief Executive Officer or other Senior Executive in large and medium sized business, industrial, governmental, and non-governmental organizations. This project is described in some detail in the enclosed brochure. *[Attach printed brochure – preferred -- or as a pdf format digital file.]*

This research will be based primarily on a series of about 10 interviews in each of 10 countries around the world with CEOs and other Senior Executives, plus about twice that number of interviews with program and project managers, in organizations in a number of industrial sectors and several governmental agencies.

I will call your secretary within the next few days to learn of your decision on this request, and hope that we can set a convenient time for me to come to your office and conduct the interview within the near future. I enclose my brief biographic sketch to give you an idea of my own background relating to the field of project management.

Also enclosed for your background information is a list of interview questions plus a short written questionnaire that I would plan to use during the interview, if you find it possible to agree to being interviewed for this important research project.

Thank you for your time and attention.

Sincerely,

[signed]

[title]

Enclosures:

1. Brochure: *Project Managers as Senior Executives?*
2. Biographic sketch of interviewer
3. Proposed Interview Questions.
4. Questionnaire

**PROJECT MANAGERS AS SENIOR EXECUTIVES
RESEARCH PROJECT BROCHURE**

If you do not have a printed brochure available, please download and print the brochure from

http://www.pmforum.org/library/research/PROJECT_Managers.pdf

For a general description of this project, please go to

http://www.pmforum.org/library/research/PMI_ESC_Research_Project.pdf

CEO/SENIOR EXECUTIVE INTERVIEW QUESTIONS

1. Would you please give us a brief description of the key positions in your career that led to your appointment as CEO (or other Senior Executive position)?
2. What do you consider to be the most important aspects of your education, training, and experience that have influenced your successful career?
3. What individual persons and networks have had the greatest influence on your career?
4. What have been your most significant experiences in the field of Project Management?
5. Can you describe what a successful project is, and the reasons why it is considered a success?
6. Please describe a failed project, and what you perceive as the reasons for it being a failure.
7. What experiences have you had in managing projects that have given you knowledge and capabilities that have been important to your success as a CEO (or other Senior Executive)?
8. From your perspective, what are the main similarities and differences in the roles, responsibilities, and competencies between a CEO and a project or program manager
 - a. From a behavioural point of view, and
 - b. From a political point of view?
9. Does your organization have a formal career path process for Senior Executives?
10. Does it have a formal career path process for Program/Project Managers?
11. Regarding program and project managers in your organization:
 - a. Do you have the formal title of Program or Project Manager?
 - b. Does any member of your Board of Directors also carry the title or responsibility of Program or Project Manager or Director? If yes or no, what are the reasons in either case?
 - c. What do you think the developmental steps should be for a project manager to reach a senior executive level of responsibility?
12. Can you give us a general idea of the method of appointment used to select a CEO or other Senior Executive in your organization?
13. If you and your Board should choose your successor, in all probability what would that person's previous function or responsibility have been?
14. What is the usual makeup of your Board of Directors from the point of view of their individual educational and experience backgrounds?
15. Do you have any further observations for us in relation to this research topic?

Here are 4 quick questions with Yes or No answers to end the interview on a lighter note:

- > Are you enthusiastic about your present job? > Do you love your job?
- > Are you doing what you want to be doing? > Would you still do it if you were a billionaire?

Name of Person : _____ (entered by Interviewer)

**RELATIVE IMPORTANCE OF UNIQUE PM SKILLS
AND SIMILAR SENIOR EXECUTIVE SKILLS**

Based on the premise that the unique skills developed by a project manager are integrative in nature – that is, skills that effectively integrate the efforts of many people with diverse capabilities and interests – and that these integrative skills are similar to those required by a CEO or other senior executive, the following table lists a number of specific related competences or capabilities. Please enter your ranking in each column, based on your experience and knowledge, for each of these items as it relates to the responsibilities of a program or project manager and those of a CEO or senior executive.

- | | |
|----------------------|----------------------------|
| 1 – Very important | 4 – Not very important |
| 2 – Rather important | 5 – Without any importance |
| 3 – Important | |

	Relative Importance for ->	Project Manager	CEO/Senior Executive
1	Problem Solving		
2	Result Orientation		
3	Sense of Perspective		
4	Good Communication Skills		
5	Negotiation		
6	Assertiveness		
7	Decision-Making		
8	Use of Positional Power		
9	Conceptual Thinking		
10	Organizational Commitment		
11	Conflict and Crisis Resolution		
12	Competencies in Forecasting		
13	Holistic thinking: looking at the big picture as a whole		
14	Using a systems approach : ability to recognize how things are linked and connected		
15	Being flexible, adaptable, open-minded		
16	Ability to set and balance priorities		
17	Cross-cultural abilities (macro and micro)		
18	Skills in PM methods and tools : planning, scheduling, forecasting, defining objectives, visualizing the future, analyzing and managing risks, monitoring, and controlling		
19	Team and people skills: Interpersonal skills required to lead, communicate, coordinate, facilitate, motivate, and build a team		
20	Technical skills: i.e. engineering, scientific, economic, mathematical, or other skills related to the particular technical discipline		
21	Basic business and management skills: How the business or industry operates, how companies and other organizations are managed, and fundamental methods of planning, budgeting, financing and operating organizations		

Name of Person : _____ (entered by Interviewer)

**RELATIVE IMPORTANCE OF SENIOR EXECUTIVE ROLES FOR
PROJECT MANAGERS AND CEOs**

ROLES

Please enter in each column your ranking, based on your experience and knowledge, for each of these roles as it relates to a program or project manager versus a CEO or senior executive.

- 1 – Very important
- 2 – Rather important
- 3 – Important
- 4 – Not very important
- 5 – Without any importance

	Relative Importance for ->	Project Manager	CEO/Senior Executive
22	Maintaining a strong, stable point in a world of discontinuities and turbulences		
23	Being a positive role model for the behavior of members of the organization		
24	Providing meaning and purpose for the actions of members of the organization		
25	Acting as a focal point for interaction between the organization and the environment		
26	Articulating and spreading current economic, political, and technical realities within the organization		
27	Demonstrating a practical grasp of reality		
28	Identifying and recognizing the importance of weak signals of change		
29	Creating and communicating a vision of the future reality of the organization		
30	Creating and positively influencing the culture of the organization		
31	Fostering and protecting a positive climate of cultural diversity		
32	Acting as a change agent by:		
33	1- identifying when changes are needed		
34	2- supporting changes within the organization		
35	3- encouraging actions to support changes		
36	4- moderating the negative impact of changes		
37	5- being a personal model of progressive change		
38	Performing positive roles within the local and wider social communities		

To be completed by the Interviewer prior to the interview

INFORMATION ABOUT THE PERSON TO BE INTERVIEWED

Name of Person: _____

Title:

Length of time in this position (*if known*):

Organizational scope of this position (*corporate, subsidiary, operating division, global, regional, etc.*):

Biographic information:

Age (*if available*):

Attach copies of published CV (from company annual reports, news articles, Who's Who publications, Internet sources, other. If no published CV is available, please request a copy of whatever is available from the person or their secretary.)

Contact Information (*Email and mailing addresses, telephone numbers, person to be contacted (secretary or assistant)*):

INFORMATION ABOUT THE INTERVIEWEE'S ORGANIZATION

Name of the organization: _____

_____ Governmental Agency:

___ Federal/National Agency

___ State/Province/Department/Other _____ (circle/highlight one)

___ County/City/Other _____ local agency (circle/highlight one)

_____ Industrial/Business:

___ Information technology

___ Manufacturing

___ Construction

___ Financial services

___ Mining

___ Transportation, communication, electric, gas, oil

___ Sanitary services

___ Wholesale and retail trade

___ Other services

_____ Institutional : Educational/Health Services/Other _____ (circle/highlight one)

Name of the specific part of the organization for which the interviewee is responsible (if not the total corporation or agency):

Notes :