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Preface

This is a new/replace-
ment preface

This book is about project success. It reveals a secret for project success: effective project leadership. It shows where pure project *management* falls short and why project *leadership* is the decisive factor for project success. It outlines five simple yet powerful leadership principles which, if applied systematically, can help you pave the path to project success. This book explains these principles and illustrates how you can use them to set up, manage, and align your projects for success. Last but not least, it shows you how to become an effective project leader.

In a nutshell, the five principles state that effective project leaders

1. Build vision
2. Nurture collaboration
3. Promote performance
4. Cultivate learning
5. Ensure results

They thus help secure project success.

These five principles are not based on a particular theory or management concept. A vast amount of literature exists on project management, leadership, project success, and related topics. This literature is important and valuable. Yet, I did not want to write a literature review of the various books on project leadership. Although that also may be a valuable exercise, it was not my intention. Instead, I wanted to write a practical book based on my own personal experience in project management. I wanted to share my insights about project success and my philosophy of project leadership and how it contributes to project success. I was not interested in building complex theoretical models of project leadership. My aim was to develop a guideline for project leadership that can be applied in any kind of project. Thus, the project examples I cite come from all kinds of environments, professional and nonprofessional. They show that the principles are universal and independent of the nature of a project. One third of the book is reserved for practical samples showing the leadership principles in action. In addition, the appendices contain

practical and easy-to-use templates and guidelines you can immediately apply in your projects.

I am not in the position to claim that I have worked, managed, or reviewed only successful projects. I have seen and experienced great projects in which everything seemed to work. And I have been exposed to death march projects: doomed for failure from the beginning, or things just did not go well, or the work atmosphere was lousy, or there was no team and instead people were fighting rather than working together. This is not to say that this is normal. Indeed, I claim that most projects can be successful if set up and run correctly. This book will show you how.

It starts with good, solid project management. This is the toolset of a project. As such, it can serve as an excellent vehicle, leveling the way to project success. It is not, however, sufficient. I have witnessed projects in which the project manager was highly skilled in his or her discipline and all tools and templates were based on best practices. And yet the project failed or at least did not go as well as expected. Final project deliveries were good but the road to this delivery was filled with the debris of long hours, low team morale, and dissatisfied customers.

For some time I, too, had thought that project management is *the* critical success factor of a project. Fortunately, I learned that there is much more to it. At the beginning of a project I managed earlier in my consulting career I gathered the complete project team. We discussed how to ensure project success from the very beginning. Then we talked about the hard facts, which in this case was the successful integration of a call center software. And we went beyond these hard factors. We talked about how we could delight the customer, how we could ensure high quality throughout the project, how we could learn from our mistakes during the project, how we could work smart and not hard, and how we could have fun as a team. We set out on the project journey on a high note; we wanted to set a new standard for project success.

Succeeded we did. The project was delivered on time and in budget. From this perspective many people would call the project a success no matter what. Analyzing the success, we found that it was actually the “softer” objectives that helped us deliver the project successfully. Project success was more than the sum of deliverables. The path to the final delivery mattered a great deal. And it was about us as the team. We worked together, shared our expertise and experience, grew together, and had fun together. Alas, we were human and consequently we made mistakes along the way. What was different in this project was what we made out of our mistakes. We took them as learning opportunities. We wanted to deliver results and thus accepted mistakes as learning steps toward the ultimate delivery of the final product. It was a very rewarding experience. And it was insightful, for it revealed the five principles I am laying out in this book. We started out the project with a common vision, we nurtured collaboration, we performed as individual experts and as a team helping each other, we cultivated learning, embracing mistakes as learning and growth opportunities, and finally we delivered results. Project management was an important and valuable element in project success. However, it

was the vision, collaboration, performance, learning, and results that made the key difference. They were and they are the principles for project success. Our project success was not a one-time phenomenon or happening at the end of the project. It was ongoing; it was a growth process for the duration of the complete project and culminated in the final delivery: on time, in budget, at a very high quality, and, last but not least, delighting the customer.

Project success is like a journey to a final destination. We can compare it with an expedition or tour. Take the image [here](#) of a mountain guide showing the path to the summit of the mountain. You can see the path in front of the guide. The planned route is marked on a map and maybe you can see it in the distance. To get to the summit you need to be in a good physical shape and carry the right tools with you. Depending on how experienced you are, you may need the help of others to reach the summit or you may offer your assistance to other members of the expedition. If you have ever hiked a mountain you know that arriving at the summit is certainly the climax of your trip. But it is not the only thing that matters. The ascent to and descent from the summit are just as important. And just as joyful. Reaching the summit may be the driver of the mountain tour. If, however, this is the only thing you focus on, chances are that you will fail along the way and never reach the summit. Hiking through nature, you are exposed to the natural elements and must react to changing environments. You may have a plan that has proven to be reliable in the past. However, at times you may have to change your track. You may need to take a detour or decide to turn back to the base camp and try to reach the summit at a later time or maybe not at all. Good, experienced tour guides know this. They take on the responsibility for their whole group. They want the group to safely reach the summit and return to the base. It is not about the performance of individuals, who may be highly skilled and experienced mountaineers. The mission is to reach the top together and return home safely. This is why the picture I chose for the book cover includes a group of people rather than a single individual reaching the summit of a mountain. A mountain tour is, just like a project, a team effort.



It is misleading to define project success in static terms, focusing only on the final delivery. In the mountain tour example, reaching the summit represents that final delivery. Project success is dynamic and covers the complete path from initiation to the final deliverable and project closure. Effective project leaders takes this into account, just like the experienced mountain guide who plans the tour, takes

a group of people to the summit, returns them home safely, and is committed to making the tour a joyful and safe experience.

Project leadership and the principles of effective leadership are not limited to the role of the project manager or project leader. Indeed, you can apply the five principles of effective leadership in any role you fill on a project, whether as the official project sponsor, project manager, team member, external consultant, project auditor, or any other project role. Applying the leadership principles outlined in this book contributes to project success. Alas, by themselves they do not guarantee project success. It takes more than a single individual to secure project success. It takes a team. The question is how you can increase the chances that your project is moving in the right direction. The five leadership principles serve as a guideline to project success. It is up to you to apply them in your role and thus make a difference. It is a question of leadership. I am claiming that you too can apply the leadership principles, practice leadership in your role, and thus contribute to project success. It may be difficult at times. But it is possible. Every journey, regardless of how long it may be, starts with the first step. Take this step and move forward. May this book serve as a companion on your journey to project success. I wish you a happy and prosperous journey

About the Author

Thomas Juli is an experienced, enthusiastic, and results-driven manager. He provides leading-edge program and operational management, offering more than 12 years of progressive leadership and management experience in various functions including project and program management, management consulting, business analysis, professional training, and academic teaching. He is a certified Project Management Professional (PMP®) by the Project Management Institute and Certified Scrum Master (CSM) by the Scrum Alliance.



He is managing director of Thomas Juli Empowerment Partners, a professional service organization for innovative empowerment, consulting, and interim management. Prior to starting his own consulting business, Juli worked for SAP and two leading management and IT consultancies, Sapient and Cambridge Technology Partners. He consulted for various companies in telecommunications, banking, energy, and the public sector. He has spoken at conferences on project management and customer relationship management and has written articles on project management for professional journals.

Before entering business, Juli was engaged in research in the fields of economics and U.S. foreign policy. He holds a doctorate with distinction in international studies from the University of Miami, and an M.A. in economics from Washington University in St. Louis.



Chapter 1

The World of Projects

Nothing astonishes men so much as common sense and plain dealing.

Ralph Waldo Emerson (1803–1882),

U.S. philosopher, essayist, and poet, from the essay “Art” (1841)

1.1 The Nature of Projects

So, what is so special about projects in the first place? Actually, nothing really. There have always been projects in our daily life, in both the business world and the nonbusiness world. The difference is that today people speak about projects differently. Maybe it is a modern word and people want to sound important when they say it. But still there is nothing new about projects.

An obvious advantage of projects is that they produce results in a predetermined and agreed-upon time frame. They can be a relatively short duration of only a day or two or a long-running projects of several years. The fact is that projects produce results, tangible or not. They produce results.

So, what is the definition of a project? I suggest the following: *A project is a set of activities directed toward commonly agreed-upon objectives to be accomplished in a certain time frame which is not endless. The direction of a project is given by its objectives. It is a unique endeavor.*

In contrast to projects are routine jobs. For example, assembling a car in a factory is not a project but routine work. Tax income form processing by an IRS employee is a routine job, not a project. Taking your kids to school is a routine job.

The Project Management Institute (PMI) offers the following definition of a project: “A project is a temporary endeavor undertaken to create a unique product,

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service, or result. The temporary nature of projects indicates a definite beginning and end. The end is reached when the project's objectives have been achieved or when the project is terminated because its objectives will not or cannot be met, or when the need for the project no longer exists." (Project Management Institute, 2008, p. 5)

What all common definitions of a project have in common are that a project is a unique endeavor, framed by a given time frame defined by a set start and end date.

Let's talk about some project examples. For most readers, projects in business seem most familiar: development of a new product, integration of new software, building a bridge or a house, and so forth. In politics, the planning of and running an election campaign can be considered a project. It has a set start date and a fixed end date, which happens to be election day, and it yields results. Another example is the founding of a preschool, from the initial planning date until opening day. Planning a summer camp for a youth group is a project. So is the preparation for a party, whether it is a family party or festivities for your organization or company. If you are involved in a club, a fundraising marathon is a project.

One can find endless examples of projects. Tom Peters (2007) goes as far as claiming that all white collar work these days is and actually has to be project work. "And not just any project, no matter how droning, boring, and dull, but rather what ... I come to call 'Wow Projects': projects that add value, projects that matter, projects that make a difference, projects that leave a legacy ..."

I was fortunate that most of the projects I worked on or managed, inside and outside of business, met these requirements. It was not the nature of the projects. It was the attitude of the whole team and its desire to create something special. All of my wow projects started with a clear vision; clear enough to become emotional about it. We could see, smell, and feel the expected end results. This was a strong driver in our day-to-day activities. Other attributes of these projects were that collaboration was working: roles and responsibilities were defined, team members' expectations articulated and accounted for, and all were reviewed regularly, adapting them where necessary. We nourished teamwork and the freedom to act for a common goal. Creating and nurturing an innovative learning environment, an atmosphere where feedback was sincere, honest, and constructive, was another success factor. It was about helping and learning from each other. Last but not least, the wow projects were about delivering results, not just the final deliverable. Instead, we set weekly goals to work on and deliver. This meant we always had a good sense of accomplishment. Project success became success for all of us.

ED: Are these two sentences redundant?

Projects are everywhere. They are prevalent. As such, it seems that everyone is, has already been, or will be involved in a project in one way or another. From this perspective, there is nothing special about a project. The distinguishing factor we will shed light on in this book is what *project success* entails. It is easy to talk about a project. It is another matter to lead a project to success.

Before elaborating on project success, let's once more return to the key characteristics of a project. The multitude of characteristics are too numerous to list on this page or even in a single book. Let's review the core ones.

Projects have objectives. They want to achieve something in a given time frame. They need not have a certain duration. Projects can be short-run, such as planning a birthday party, or long-run, such as planning a mission to Mars. The duration does not matter so much to the definition of a project as the fact that every project has an end date. Without an end date, it is most likely not a project and instead a routine activity. Hence, the duration of a typical project is project-specific. No official definition exists for what the duration should be.

A project is usually run by a team of people who serve in different roles. Usually it involves a project manager, whose job is to manage the project to success. In addition to the project team, people outside the project may have an interest in and influence on the project. Let's have a closer look at all the roles, within and outside of the team.

The project team provides for both formal or informal roles. Often there is a distinct role of project manager. The project manager is in charge of the project; he or she is responsible and often accountable for the success of the project. Project players can also be found outside the inner circle of the project. Many people have a keen interest in the success — or failure — of your project, including the customers and the project sponsor who initiated the project. If you work in a corporate setting, your company may have a project management office that coordinates several projects and makes sure they are all in sync with the overall corporate strategy. Other important project players include line managers, who may compete for the same people who are working on your project.

In short, it would be wrong to assume that project players can be found only in the innermost circle of your project. Look outside of your core team and assess your environment. You will find more players than you initially thought possible. Some will play a more significant role than others and may require greater attention.

You may think that having your team in one location is normal. This may be so in some cases but not all. A single project can take place in one or numerous locations. Today's business world is becoming smaller. A couple of years ago it could not be imagined that projects could be run on several continents. It is still the same team but not in the same location. Thanks to technology, it has become possible to communicate with team members no matter where they are located in the world. We call these teams *distributed teams*.

Going a step further, it is now possible to run a project and never meet your own team members. This is called *virtual teams*. This, too, has become normal business to many companies in our global marketplace. The same scenario can happen in your community, in a nonbusiness environment. Say, for example, you are organizing a soccer tournament. You have set up a planning committee, the members of which are distributed across your region. You talk to them on the phone and exchange emails, but may not meet until the day of the tournament. Yet you were part of a team. Thus, distributed and virtual teams are not limited to the business world. They are closer and more normal than you think.

When you set up your project you take people from other groups. In a corporate environment your company is organized in different departments, called line

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organizations. These departments may follow routine jobs. Your project could be embedded in one department, or it may transcend department boundaries, affecting and involving several departments. In this case, your project adds another level of complexity to the organizational environment. This is called a *matrix organization*. If your project exists in its own environment without breaking or transcending any line organization you may be working in a *project organization*. Which one is best depends on the project. Each has its advantages and disadvantages. Although the matrix organization is the most common in business these days, it is also the most complex. One of its greatest advantages can also be a source of potential conflict. Namely, on the one hand a matrix organization may facilitate cross-functional work across organizational boundaries. On the other hand, some organizational units may oppose this kind of work and withdraw their support of your project. Conflict is programmed. It takes effective project management to cope with this challenge.

AU: Not sure what this means: "Conflict is programmed."

One thing is certain: your project does not exist in a vacuum. In rare cases your project may be totally isolated from others. For example, certain scientific research may fall under this category. Your research project may be isolated to you but not to others. You may not see any dependencies to other projects because your project may be the domineering one. But dependencies may exist if you rely on input from others or vice versa. There may also be interdependencies where other seemingly unrelated projects affect those that have an impact on yours. For example, you have obtained all the required input for your research, but then another project in your organization is given greater priority and a higher budget. That project will thus use money that was originally planned for your research. You may have had no interest in the other project, yet it affected you because now you may be short of money to fund your research.

ED: Word choice?

In a nutshell, projects always exist in a social and organizational environment that can be complex and interdependent. Some projects are totally isolated, as mentioned above. However, for the purpose of this book I assume that every project exists in a social environment that is complex and interdependent. One can also assume that every project, to some extent, exists in a chaotic environment. It is not possible to account for all circumstances in your project plan. This is yet another reason to talk about guidance and leadership. Someone has to tell us which way to go and that there is a light at the end of the tunnel, an answer to this, and project success. This cornerstone to project success is called project management.

1.2 Project Management as a Cornerstone of Project Success

First, let me be quite frank: project management is NOT the only or even single-most-important element to project success. It is a cornerstone, a single stone, not the whole house. It is a very important stone though. It gives the house a frame with which to start. Some people may even consider it to be the first cornerstone. I am not one of them. Project success is not equal to the appropriate application of

project management. It entails much more. The end result of your project matters as much as how you get there. We will return to a definition of project success later. For now, let's record that project management can facilitate project success. It is important and necessary for project success, but it is not sufficient. Before I explain why this is so, let's have a closer look at the scope of project management.

Project management is the activity that helps initiate, plan, conduct, monitor, control, and close a project. It encompasses knowledge areas such as scope, time, cost, quality, risk, procurement management, and basic management skills. These management skills are common to other management activities, not project specific. Two examples include communication and team building.

Project management is important. Let there be no doubt. That is, a project cannot be run without project management, be it formal or informal. You need to have something that holds things together. Underlying is the assumption that we need some form of order to organize and run a project. Someone has to do something. In this sense, project management helps set a frame, providing structure and order to potential chaos. Without this structure a project leads to nowhere; it will most likely fail, if it ever takes off.

Project management is not limited to one person. All team members can be engulfed in project management. In other words, project management is not limited to the project manager. Keep in mind that we are talking about the general meaning of project management and not the individual role of a project manager.

So, what are the key elements to project management? There are many, yes. This is not surprising, given that we have just learned something about the complexity of projects. Taking a linear approach to projects and project management, we discover five key activities of project management: project initiation, project planning, project execution, project monitoring and controlling, and, last but not least, project closure. This is more or less the common, most widespread understanding of project management. It is linear in the sense that it makes us believe that a project always goes through these activity phases in this order. Indeed, this may be so in most projects. However, in reality this assumption does not hold true anymore. Projects can fluctuate from one phase to another. Figure 1.1 provides a graph of the first linear approach, where the line depicts the planned, linear project progress. However, after project completion, if you were to graph how things really went, it may look like the graph in Figure 1.2, where the jagged line depicts the actual project progress, which is clearly nonlinear.

Sound too abstract and theoretical? Let's take the example of building a house. Let's say you wanted to build your own home. You even have a picture in your mind of how it will look. You can imagine what it will be like to move in and to live in the home. You foresee the planning phase, talking with construction workers, agencies, your bank, and so forth. You are ready to go. You have sketched a first blueprint and have checked your finances. You think you are ready to start construction when your bank calls to tell you that it needs another form of security from you. Or, 2 weeks after construction has started, you find out that the blueprint doesn't

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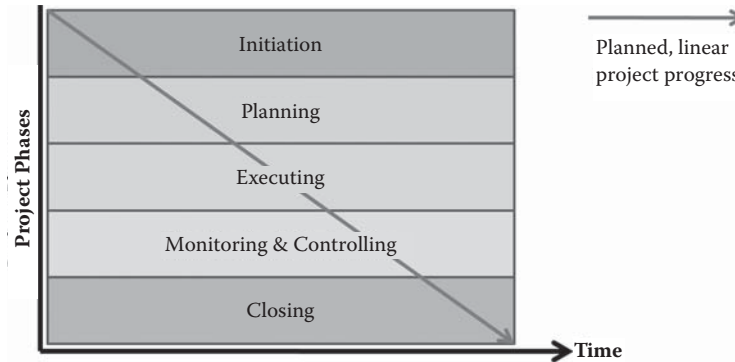


Figure 1.1 Planned, linear project progress.

include the second bathroom you asked for on the first floor. You must go back to the planning phase — parallel to constructing your house.

There is nothing wrong with the linear approach, taken as a model or framework. It certainly helps structure a project. But it does not naturally explain the key elements to project management. The graph in Figure 1.2 showed very clearly that real life can deviate from the planned line and may go in a different direction. Life is not linear. It is complex and oftentimes chaotic.

So, what are key common elements, even in chaotic projects? I think there are four:

1. *Vision, goals, and objectives.* Every project has a goal. It may not meet formal criteria of measurable results, but still, all projects are meant to achieve something.
2. *People.* Every project involves people, communication, and collaboration. I cannot think of a single project that does not involve people. Projects always exist in a social environment.

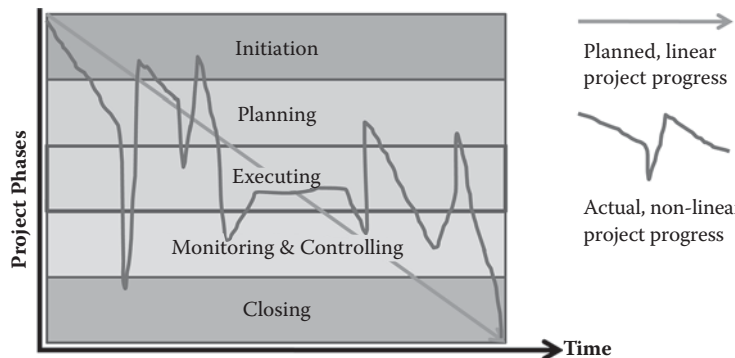


Figure 1.2 Actual, nonlinear project progress.

3. *Results*. Project management is aimed to help produce results. This means that someone or a group of people pick up something (a goal, objective, vision) and want to build toward it. They all want a result.
4. *Management skills*. They could be technical or mechanical in nature, such as time, scope, cost, or procurement management, or they could have a social nature, such as communication and team building.

Where does this lead us with respect to a project manager? Who is this project manager? What role does he or she play? Are project managers like superman, running the whole show? Or are they the administrator of some plans? Maybe project managers just facilitate the team to perform and do the work and produce results? The answer is that there is no single answer. It is unlikely that the project manager is always superman, doing all the jobs, saving an ailing project, producing all results alone and taking the glory. There may be projects like this. However, I cannot think of a project I was involved in where this was expected from the project manager. With respect to the other possible roles: coach, administrator, facilitator, leader, and so forth, yes, there are many examples where this holds true. But again, it depends on the situation. Not too helpful, you might think? Take this with you: a project manager may fill many roles. However, one thing is certain: do not expect a project manager to be superman who saves the world — or your project.

1.3 A Common Theme: Projects in Trouble

Let's have a look again at the key elements of project management: project initiation, planning, conducting, monitoring, controlling, closing and vision, objectives, people, communication, and results. All of these elements seem so simple and straight forward. And they are. Project management is a lot about common sense. It is not complicated if you think of these elements as the key to project management. But why then do so many projects fail? Let's have a look at some numbers.

The Standish Group's CHAOS report (The Standish Group, 2009a) contains some of the most quoted statistics of project success rates. Although this report analyzes mostly IT projects, the numbers can be translated to other industries and practices as well. Their press release of April 23, 2009, summarized the main findings of the 2009 report, stating that only 32% of all projects succeeded, in the sense that they delivered the required scope on time and on budget. According to the report, "44% were challenged which are late, over budget, and/or with less than the required features and functions and 24% failed which are cancelled prior to completion or delivered and never used" (The Standish Group, 2009b).

AU: Punctuation and wording as in original?

These numbers are frustrating and disturbing. No, they are alarming. Something must be wrong here. Why do so many projects fail? After all, it is all common sense, right? Well, what we can say at this point already is that common sense is not equal to common practice. This is a truism. Granted. And it is true. Actually it drives

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people nuts when you ask them why they are not practicing what they think is normal and common sense.

Let's have a look at some common themes of projects in trouble. There can be discrepancies between the goals, scope, budget, time, and quality expectations and requirements. There may be cost overruns. The team atmosphere is lousy. The boss doesn't support you. Politics are involved that make life for your project miserable. Nobody cares about time limits; milestones are regularly missed and not monitored. Let's look at some examples:

- Consider a public project of resurfacing a highway. The project budget and construction schedule had been defined early on. Unfortunately, the project turned out to be over budget and several weeks overdue.
- The goal of an IT project was to replace an existing software application in the marketing department of the company. Development work was finished on time but the marketing department refused to sign off on the new application because it did not meet its requirements.
- The target date for the rollout of a toll billing system for trucks on German major highways was originally scheduled for the middle of August 2003. It was repeatedly delayed. Finally, in January 2005 the system opened, 16 months after the original deadline.

I could go on citing examples of failing projects. But that is not the point. What is important to understand are the underlying reasons for project trouble and failure. The CHAOS report is one example for listing the most common reasons for project failure, and there are other reports available.

My own experience tells me that five key factors lead to project failure:

1. Lack of vision. The objectives are neither clearly defined nor mutually understood by those running and being involved in the project. Consequently, the scope of the project is vague and the timeline leading to the target end date is anything but realistic.
2. Lack of a functioning team. Instead, there is an accumulation of people who may or may not work together. Insular work is common. Communication is held to a minimum. Collaboration is poor.
3. The team as a whole or individuals do not perform as they ought to.
4. No reflection of its own behavior. People do not react to changes, but instead stick to old patterns. Learning does not take place.
5. No regular interim results. People may work together, but they do not produce results. If results are produced, they may be late or of low quality.

Does this apply only to projects in the business world? No. Take the following real example: In my hometown a group of parents was upset about heavy traffic. It was difficult and dangerous for their kids to cross one of the main streets in town.

All the parents agreed that a new traffic light was necessary, allowing the kids to cross the street safely by controlling traffic. They started collecting signatures. In less than 3 weeks they collected 200 signatures. This was an impressive number. They took the signature lists to the local mayor and asked for his support to release the necessary budget money. Unfortunately, the mayor was not convinced of the need for a new traffic light and turned down their request. The parents protested but could not change the mayor's mind. Frustrated, the parents gave up and the project died.

What went wrong? First of all, this project did have a goal: a traffic light. Clearly this was not the cause for project failure. Problems arose because the parents focused solely on support from the mayor. However, the mayor was only one person, and the budget authority lay with the town council. Unfortunately, none of the town council members were informed or involved in the project. Another cause for the project failure was the lack of reflection on the parents' part. Once the mayor signaled his skepticism about the project, the parents did not challenge him, nor did they ask themselves what else they could do to achieve the project objectives. Instead, they gave up.

As much as projects are part of everyday life, so is trouble and project failure, it seems. However, do not generalize this statement that most projects are doomed for failure right from the beginning. When talking about projects in trouble, one should distinguish between those that are merely ailing and those that are indeed doomed to fail. Ailing projects can be realigned to their original or modified objectives if the necessary changes are made. In the case of failing projects, you may soothe the pain, but it is impossible to rescue the project, or at least it is very difficult and unlikely that you will succeed. Project objectives are no longer achievable.

An example of an ailing project was the construction of the Olympic stadium for the Summer Olympic Games 2000 in Athens, Greece. Two years prior to the opening ceremony the construction was way behind schedule. The construction crews managed to catch up and barely finished the stadium before the Olympic Games.

An example of a failing project was the idea to build a high-speed train connection between the Munich Airport and the Munich Central Station in Germany. Whereas public resistance to the project was moderate at the beginning of the planning phase, it strengthened the more it became apparent that the original budgeted project cost would most likely explode and even double. The objectives of building and operating an economical train connection were no longer achievable. The project was canceled before the first construction worker could arrive.

Don't think that if you are faced with or involved in a failing project there is nothing you can do. Regardless of your role, if you want to demonstrate leadership you can always act, and actually you must act. This is even more true in the case of an ailing project, which can still be saved.

You can try realigning the project, by yourself or with others. We will talk about possible approaches for realigning ailing projects later in this book. And even in the case of a failing project there are things you can do. You can run away, hold still,

swallow and wait for better times, hope for a miracle, or do nothing. Or, if you are the person in charge of the project, you can cancel the project. Indeed, canceling a project may be the only right thing to do. Don't have the illusion that every project has to finish successfully. First of all, we have learned that a majority of projects do fail for various reasons. Once you realize that your project falls into this category you may seriously consider canceling it. It may save time and resources and, on your part, lots of nerves and energy.

Regardless of whether you have to cancel a project or manage to realign it, you can learn a lot from such project rescue missions. This is true whether you have been actively involved in such a situation or simply read about it. Failing and ailing projects offer valuable lessons. The main thing you want to learn is how to set up a project the correct way right from the beginning. You want to learn how to create and nurture your project right from its initiating stage. There is no law that projects first have to fail in order to succeed. When you start a new project, set it up for success from the beginning. That this is no illusion is shown in the following example.

Let's return to the story of the futile attempt by parents to get a traffic light. One year later, a new group of parents formed. They were aware of the previous failed attempt to get a new traffic light. Although the new group had the same goals, they did not focus only on a safe passage for their own children. They expanded the vision to include senior citizens and everybody else who had a hard time crossing the road. Prior to starting their signature initiative they informed the town council members and secured their support for the project. In addition, they involved local schools and businesses. Last but not least, they talked with the local newspapers, which ran reports on the new project. Initially, the mayor was still skeptical. When he realized the project had strong public support, he changed his mind and jumped on the bandwagon. Within a few weeks the town council released the necessary budget money for the new traffic light. Six months later the new traffic light was in operation.

ED: OMG! This sounds like how I managed to get sidewalks installed near a park and school by my ho

This example shows that just because a project failed before doesn't mean it won't work the next time around, provided we identify the root causes of the previous failure and resolve them, or just avoid them right from the beginning. It is therefore wrong to assume that most projects are doomed for failure or that troubled projects inevitably lead to failure.

1.4 Leadership and Project Success

Successful projects are not figments of imagination. They happen. Daily. It is up to you if you want your project to be one of them. Earlier we learned that project management is mostly common sense.

Well, now it is up to you to put this common sense into action. Practice common sense. Follow through. And inspire your team to follow you. Lead the pack and move along as a team.

This does not happen overnight. Some people think that it is sufficient for the team to acknowledge and practice common sense. I am saying that this is not sufficient. Yes, it takes a team to run a project. But it takes at least one person to lead the pack.

The right and appropriate project management skills are crucial. In addition, you must have an understanding of basic leadership principles, and you have to live them. The combination of project management and leadership principles yields project leadership. Corollary, not every project manager is a project leader.

The team is equally important for project success. The collaboration within the team and the performance of each individual team member as well as the performance of the team as one unit are critical factors for project success. Without a performing team it is difficult to secure project success. A performing team does not fall from heaven. It is possible that teams successfully organize themselves into a performing unit. There may even be the absence of formal project management as we know it. But don't be fooled. Every performing team still needs rigid boundaries within its functions.

Performing teams can evolve from within, but you have to ignite this fire of performance and you have to set boundaries within the team for it to function. If you want to generate results out of seemingly chaos you have to build structure that enables creativity, innovation, and results. Helping build and sustain this structure is the leadership we will be talking about in this book. Project management provides excellent tools to build this structure. By themselves the tools are not sufficient for project success. Unless you gear them into the right direction, they remain ineffective. If you want to secure project success you have to understand what it takes to set the right direction. Project management alone will not do the trick. It takes leadership — your leadership. Without project leadership there is no direction in project management. Leadership is the decisive factor for improving the chances for projects to succeed. Consequently, effective project management needs to have a solid foundation based in project leadership. Without leadership, chances are that a project will be “just another project.”

It is up to you which project you prefer. If you are interested in successful projects and what leadership principles help you achieve them, continue reading. Leadership principles are not rocket science. Why? Because the five leadership principles I propose in this book are based on common sense. They are not abstract ideas or figments of our imagination. They work because they are based on real-life project experience. Because they are common sense, it is not difficult to understand and apply them and demonstrate true leadership.

This book will tell you what it takes and how to get there. The first part of the book introduces the concept of the *project leadership pyramid*. This pyramid comprises the five leadership principles for project success. The second part of the book will put the project leadership pyramid into practice. It includes practical examples for how you can apply the five leadership principles in your daily project life. The final part of the book (Part III) details how you can become an effective project leader.

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ED/AU: TS needs to be instructed about where and whether to insert section dividers (“Part I”, etc.). Can we have Chapter 1 and then a divider before chapter 2? Then it looks like maybe chapter 8 is the start of the next part and then maybe chapter 14, and then of course the appendixes... Author refers to the “parts” throughout the text and numbers them with roman numerals.

1.5 Application Suggestions

Think of two projects of your choice. One should be a project that could serve as an example of a project in trouble, the other one a project that runs or has run smoothly and to your full satisfaction.

1. Answer the following questions about each project:
 - a. What are the objectives of this project? Are they mutually understood and even agreed by everyone involved in the project?
 - b. Do you have clear roles and responsibilities in the project? How is the atmosphere on the project?
 - c. Does everyone speak openly and freely? Or are communication channels obscured and blocked?
 - d. Does every person and the team perform as expected? What is done if an individual or maybe even the whole team is not performing as expected and/or required?
 - e. Do you stick to your plan? How do react to changes in the project situation?
 - f. How often do you deliver results? Do they meet minimal requirements?
2. Compare your notes and identify the three most important factors that affect or have affected the success of your project.

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THE PROJECT LEADERSHIP PYRAMID

I



Chapter 2

Introducing the Project Leadership Pyramid

Management is doing things right; leadership is doing the right things.

Peter Drucker (1909–2005),
top management thinker of his time

2.1 The Difference Between Management and Leadership

Let's start with the hypothesis I set forth in the last chapter: "effective project management needs to have a solid foundation based in project leadership." What does this mean for project management and how does it relate to this book? First, we need to distinguish between management and leadership, between managers and leaders, and alas, between project managers and project leaders. There is a difference. A big difference. Leaders define a direction. They take the initiative and take responsibility. At the end of the day they are accountable for the outcome of their projects. Managers, on the other hand, take orders, they do their job to the best of their abilities, and they are assigned to certain roles and responsibilities. Leaders act, managers react.

"Now, wait a minute!" you may exclaim, "I am a project manager and I am taking the initiative. I am not reacting. I am proactive and I am held accountable for the outcome of my project. Why do you still distinguish between a project manager and a project leader?" The answer is simple. As a project manager you can be or

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become a project leader when you practice the principles of leadership. Combining project management skills with leadership principles constitutes the foundation for effective project management. The difference is that on the one hand you may have a project manager whereas on the other hand you have an *effective* project manager who possesses traits of a leader and lives by leadership principles. This is the difference between an ordinary project manager and an effective project manager and project leader. And yet there are also overlaps. Take, for example, the basic project management skills. The hypothesis claims that project leaders must be knowledgeable and competent in project management skills. Corollary, proclaimed project leaders without project management skills can hardly be good project leaders. As a matter of fact, I would not consider them project leaders in the first place.

2.2 The Power of Simplicity

It is simplicity that makes the uneducated more effective than the educated when addressing popular audiences.

Aristotle (384–322 BC),

rhetoric, Greek critic, philosopher, physicist, and zoologist

Can a project manager become a project leader? Yes, absolutely. Project management is in most cases common sense. Project leadership is no different. It, too, is based on common sense. It is interesting to see that there is a plethora of books and articles about leadership. There are so many things the authors want you to think you have to consider when you want to become a leader. It could very well be so. But does this help you to become one? I doubt it.

Experience shows that we can best work with a few principles at a time. Many factors must be taken into account for effective leadership. Still, you can work best by keeping just a few principles in mind that you actually thrive to live. Academically, this is based on chunk theory. Miller (1956) noted that the memory capacity of young adults is around seven elements, called chunks, around seven for digits, six for letters, and five for words. If this holds true for young adults, the rest of us who do not consider ourselves “young” adults anymore likely have a similarly limited capacity. The fact is, it is easier to focus on five principles rather than ten or more.

Some time ago I read an interesting and inspiring book about the management and leadership principles of a very successful company in the entertainment industry (Cockerrell, 2008). It listed ten principles to live by. All of them were convincing and, yes, actually they were common sense. A few days later I told a friend about this book and how much I liked it. My friend then asked me about the first principle. Something unbelievable took place: I could not remember the principles one by one. I understood the overall idea behind them but I could not quote them anymore. Now, you may say that I suffered from temporary memory loss; maybe

I was tired or just had not paid close attention when I read the book. No, none of these were true. There were just too many principles to remember.

Let me share an example of the opposite case, where a single rule produced amazing results. A couple of years ago I managed a project the objective of which was to integrate a new piece of software in record time. The go-live date of the new application was fixed and so was the budget. In striving for the successful completion of the project right from the beginning, I suggested to the team one outstanding theme to be the main foundation of our daily work: “Work smart, not hard!” I encouraged the team to try to actively live by this theme right from the start. This was reflected in the objective to use a best practice approach to project management and software development wherever possible and to share knowledge, experiences, and methodology. Newly learned lessons were discussed and documented on a weekly basis.¹

The project turned out to be a huge success. Not only were we able to deliver on time and in budget, but throughout the project life there was a high level of collaboration, performance, and learning on the individual and team levels. We all worked smart — and had a lot of fun along the way. This simple slogan was coined for the project and teamwork from the very first day. In the beginning it was a slogan. Gradually, we internalized it and it became second nature and yielded great results.

This example shows us that you don’t need a long list of instructions for how to lead your project to success. I prefer simple rules and principles. In this case, less is more, especially when there are five simple principles we can easily remember, understand, and live by.²

2.3 Common Themes of Leadership

So, what are the five leadership principles to which I refer?

There are countless books, articles, and opinions about leadership and what it takes to become and be a leader. Identifying the project leadership principles that I will be describing in this book, I did not limit my search to project management, whether it be project management books, best practices, or my own experience. I expanded my search to our daily world. I asked what distinguishes true leaders from “normal” people and followers. I ended up consolidating the following five common themes.

¹ I described the project set-up in a presentation at the PMI Global Congress (Juli, 2003).

² By this token, Thomas G. Johns (2008, p. 3) states that “Guidelines for ... a [complex project management] system, as described by Morgan (2006), is to build a good enough ‘vision’ and replace intricate (complex) strategic plans with a few short, simple statements that describe the general direction that the organization is pursuing and perhaps a few basic boundaries.”

All of the great leaders that come to my mind had a vision they talked about and followed. They inspired people. Second, it was not just them speaking and making the magic. They reached a large number of people who were convinced enough to follow them. Then they all worked together to go after the vision. Third, the leaders did not just talk about their vision. They acted and were role models. They knew what they were talking about. Fourth, they were open for feedback, adjusting their strategies to changing environments. Last, they delivered results and not mere words.

There are so many public figures we consider leaders and role models, including Mahatma Gandhi, Martin Luther King, Jr., John F. Kennedy, and many more. Gandhi led an entire nation to independence from the former colonial power of Great Britain. Martin Luther King led the desegregation movement in the United States. John F. Kennedy set out the vision of putting a man on the moon before the end of a decade. All of them had a vision, they inspired people, they walked their own talk, they showed flexibility by adjusting their strategies to changing environments and circumstances, and they made a lasting difference. The question, then, is how we can translate these leadership themes to the needs of the project world. What are the principles of effective project leadership?

2.4 The Five Principles of Effective Project Leadership

The five leadership principles for project success are as follows:

1. *Build vision.* Sharing a common vision and goals and having the same understanding about tracking the progress towards this vision is one of the key factors in the success of a project and team.
2. *Nurture collaboration.* A performing team yields synergy effects; the impossible becomes possible. This is why active team collaboration is crucial.
3. *Promote performance.* Planning is good and important. At the end of the day you and your team have to perform. As a leader it is your responsibility to create an environment that promotes performance, on both the individual and team levels.
4. *Cultivate learning.* As humans we all make mistakes. Effective leaders encourage their teams to explore new avenues and to make mistakes and learn from them. An effective leader builds in sufficient time for the team to learn, create, and innovate.
5. *Ensure results.* Delivering results is both a prerequisite and an outcome of effective project leadership. Project delivery is a team effort, not an individual effort. The effective project leader builds and guides the team to deliver results by incorporating the first four leadership principles.

All five leadership principles combined encompass the core of effective project leadership.

Take again the earlier leadership examples of Mahatma Gandhi, Martin Luther King, Jr., and John F. Kennedy. They had many things in common. They talked about their visions of building something new (vision principle). They inspired and motivated people to make the necessary changes (collaboration principle). They utilized their strength; they did what they preached (performance principle). Their vision was not built in a vacuum; it was based on facts, taking the environment into account (learning principle). And, last but not least, they all ensured long-lasting results (results principle).

2.5 The Metaphor of the Pyramid

Together, the five leadership principles described here build the *project leadership pyramid* (Figure 2.1). The principle at the top of this pyramid is the first principle (build vision), followed by nurture collaboration, promote performance, cultivate learning, and, at the base of the pyramid, ensure results.

The pyramid is a powerful image. I use this image for a simple reason: Although I think building vision is probably the most important principle of effective leadership, the bottom line most people see or want to see is results. Thus vision is at the top and results at the foundation of the pyramid. Collaboration, performance, and learning are necessary building blocks of the pyramid. They are framed by vision and results.

Visually speaking, when you approach a pyramid from a far distance, you first see the top. In our case, vision is at the top of the pyramid. As you get closer, you see more of the pyramid until at last you are standing in front of the first row of the building blocks (results). Looking upward, you may feel overwhelmed by the size of the pyramid. It may not even be possible to see the top of the pyramid (vision). Alas, you know that it exists. It was the first thing that you could see and what caught your attention. It guided you all the way to the base of the pyramid. If you



Figure 2.1 The project leadership pyramid.

now want to understand the secrets of the pyramid, you have to go inside. You have to explore the pyramid. This book explains the structure of the project leadership pyramid and reveals the secrets inside.

2.6 Structure of Part I

In the following chapters we will first elaborate on each of the five principles separately. We then analyze how the five principles interact with each other. You will find that there is not one single principle that is the most important element of effective project leadership. Instead, effective project leadership is made up of the whole project leadership pyramid. Effective project leaders apply all five principles as one unit. Each chapter in Part I will conclude with a discussion of how to apply the specific principle to various roles. What we will see is that regardless of your role on a project, may it be as the project sponsor, project manager, team member, or auditor, the principles hold true. They are project independent. This makes them quite powerful.

2.7 Application Suggestions

Think of five leaders in your environment (personal, business, or public life):

1. What distinguishes them from others?
2. What are the key principles you can distill from analyzing their behavior?
3. How could you transfer these principles into your daily project life?

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Chapter 3

Principle 1: Build Vision

The reason most people never reach their goals is that they don't define them, or ever seriously consider them as believable or achievable. Winners can tell you where they are going, what they plan to do along the way, and who will be sharing the adventure with them.

Denis E. Waitley (1933–),
American motivational speaker and writer

3.1 Vision

There are several reasons why building vision is the first leadership principle. From an image approach, it is the tip of the pyramid you see from the distance. It guides you; it gives you a direction to walk toward. From a content perspective vision, gives your project meaning, the reason for its existence. Let's look at an example.

A couple of years ago my wife and I were deeply frustrated that there was no reliable preschool in our town. Our eldest daughter had just finished attending a preschool that, unfortunately, closed shortly after, and there was no other preschool in our community. This is why we were looking for a preschool for our youngest daughter. There were other preschools in the region. However, they were overpriced or had a waiting list of 1 year or longer. This was clearly no solution to our problem. We needed to have a reliable preschool, allowing my wife to return to work for at least a few hours every week. In addition, we were convinced that a preschool was good for our children. One evening we met with other parents who faced a similar situation and were equally frustrated. We talked about what a relief it would be to have a reliable preschool in our town. We visualized the daily routines, the happy

kids, you name it. At one time I stopped the discussion and asked why we couldn't found a preschool by ourselves. We had a vision of the preschool — saw its daily operations, the happy and smiling kids. We saw how happy we were. Soon our initial skepticism of founding and running a preschool was replaced by excitement and an entrepreneurial spirit. We had nothing to lose and everything to gain. One week later we met again and founded an organization as the legal prerequisite for the preschool to develop. Only 9 months later we opened a preschool in our town. Six years later, the preschool is still operating and has expanded in size. It has become an institution in our community.

There were a number of reasons why this project turned out to be a huge success. The cornerstone of our success was our vision and our belief in it. The vision of founding and running our own reliable and affordable preschool drove our daily doing, planning. In the beginning we did not have the faintest clue how exactly we could realize our vision. And there were a lot of obstacles ahead of us. People and other organizations told us that it would take at least 2 to 3 years to found a preschool. Well, we proved them wrong. Our vision carried us, helped overcome obstacles. Maybe our vision even caused us to overlook the obvious obstacles and master them without much hassle. We proved our critics wrong and accomplished the seemingly impossible in less than a year.

This story illustrates that having the right vision can carry you a long way. The right vision defines the direction of your project. It constitutes the reason for initiating your project in the first place. It sets the tone of the overall project and what you want to achieve. It helps overcome obstacles because it is a driving force. You may compare it to a 110 hurdle dash. The sprinter has to run over 10 hurdles. He takes each hurdle one by one. What drives him, though, is the need to cross the finish line before his competitors. The vision is to win the race. Crossing the hurdles, which are actually obstacles, does not constitute vision but milestones on the way to the finish line.

A vision need not be described in “hard” words, like a formal project objective statement (to be discussed later). Indeed, you may want to describe your project vision in soft, flowery words. What is most important is that your vision is motivating and inspiring on a personal and emotional level. It needs to be able to create excitement and a drive in those who will help achieve it. It needs to move people to action.

Some time ago I came across a vision story about a construction project (Simmons, 2006, p. 16–17). A visitor wanted to find out what all the people in a town were working on. He approached each worker to ask about his or her tasks. The first worker replied that he was a brick layer. The second worker told him that he was building a wall. Then he asked a third worker. This one explained to him that he and the other people were building a cathedral.

What do you think was the most powerful answer, carrying the whole team towards the goal: the first, second, or third answer the visitor got? The vision of building a cathedral moved hundreds of people over a long time. They could not see

it yet but they visualized it. The vision constituted a purpose of individual projects such as building a wall.

I can transfer the story to a project of mine where we integrated new software for a call center of an online bank (Juli, 2002). The vision that drove this IT project was not technical in nature. The vision of the company was to improve overall customer service and make the customer calling technical service happy. The project was technical, but the vision went beyond the technology and was purely business driven, putting the end customer at the center of attention. The project of integrating new call center software was a mere stepping stone toward this vision.

AU: Do you mean there was a goal to make that job an enjoyable one for the employees???

The key to building vision is that people need to be able to relate to the vision in their daily activities. Give them the chance to identify themselves with the vision. Involve them in building this vision and participate in making it real. This helps build rapport and the necessary buy-in from those people to realize the project. Make them fans of the vision. Let it constitute their motivation and passion. Let them rave about it.

The secret of a good project vision is that it portrays a direction of the project in a way that people can relate to it. The right project vision is the foundation of every successful project. It is the cornerstone of success.

3.2 Project Objectives

Building vision does not mean that developing and defining formal project objectives is of little or no importance. The opposite is the case. Actually, defining project objectives is one of the key project success factors, no doubt about it. Take the example of our preschool. The vision we had was to build and run a reliable and affordable preschool. From the start we had very specific ideas in mind. We said that we wanted to open the doors of the preschool within a year, that the preschool should stay affordable (actually, we set explicit maximum target fees), that the building should be safe and big enough, and so forth. We filled the vision with life, not mere words. We broke down the vision until we had very specific objectives on which to focus.

A vision sets the overall picture of your project. Project objectives qualify this vision, make it specific. Project objectives thus constitute the concrete foundation of your specific project, for planning, conducting, monitoring, and closing activities.

Recall the quotation of Denis Waitley at the beginning of this chapter: “Winners can tell you where they are going, what they plan to do along the way, and who will be sharing the adventure with them.” Project objectives are not vague about the direction. Just like the vision, it should be described such that you and everybody else on the project team can relate to it in your daily activities. Be specific about what you want to achieve. On the other hand, don’t be too detailed; this may limit creativity and inspiration. Furthermore, you want the objectives to be relevant; i.e., in sync with the vision. The project matters to the organization and the people for whom and with whom you are working. It is relevant to the clients of the project as

well, whether within or outside your organization, be they customers or co-workers. Know who they are for they are your clients you want to delight.

Project objectives provide a very specific and concrete direction. Stay on the ground though. They still need to be achievable. This may be difficult to state at the very beginning of your project. There is no rule that serves as a guideline. Sometimes you have to rely on other people's estimates; sometimes it may be a good decision to rely on one's gut feeling and firm beliefs.

For example, when we first decided to pursue opening a preschool we were well aware that it took other communities up to 3 years to found a preschool. We didn't have this much time. First of all, in 3 years the preschool would be of no benefit to us because our own children would be too old and attending regular school. We were driven by our immediate needs and desires. We were aware that our plan might not work out as intended. At least we could say that we tried. This was sufficient for all of us to start work.

Your project objectives must have two other characteristics. They have to be measurable and time-boxed. You may want to argue about the characteristic of measurability. It is true there are projects for which it is difficult to think of measurable objectives. In such cases you could ask how you want to evaluate if and to what extent the project results will satisfy the actual requirements of the project. Trying to answer this question causes you to be more specific about your goals. The objectives may turn out to be measurable after all.

Project objectives frame a project; they set the boundaries of the playing field. Without boundaries, the project journey may take you anywhere but the desired destination.

Once more citing the example of our preschool, we set maximum target fees and agreed on opening hours. When you train for a marathon you may set a target time within which you want to run. Set the measurable target in such a way that it helps set a boundary around the project and yet is still motivating enough. Don't raise the bar too high or leave it too low. If you find out that you need to adjust it along the way, you may have a chance to do so.

Let's talk about the last characteristic of good project objectives: being time-boxed. This means you need to have a target end date for your project. This is important. Without a target finish date we are not talking about a project in the first place but about an ongoing activity. A project always has a start and an end date. The dates may change for many reasons. But without an end date you don't have a project. You may not even have incentives to start or finish it any time in the future. Why have the project in the first place if you cannot even say when you want to finish it?

All the characteristics of good project objectives — specific, measurable, achievable, relevant, and time-boxed (abbreviated SMART) — help set boundaries around your project. They help streamline your intended efforts. The aim of all characteristics is to help you focus on the ultimate project goals.

Make no mistake, it is not an academic exercise to ensure a SMART project objective. Describing your project objectives to meet these requirements forces you to think through what you really want to achieve. At the end of the day your project has to yield results. After all, this is why you start your project in the first place. Both a vision and project objectives set the tone of your project, define the direction of your project. But how specific is your goal? If you describe it in words that are too general it will give room for many different interpretations.

For most projects you are working with a team, with other people. You want to make sure everyone has the same understanding of your goal. The vision may be described in fairly general terms (e.g., we want to found and run a preschool). The project objectives have to be much more specific for people to understand the scope of your project. In the case of the preschool, we talked about the future location of the preschool, opening hours, fees, group sizes, and so forth.

Yet another example may be building a house. You take your vision to an architect. The architect will ask you what exactly you have in mind. If you stay on the abstract level you may end up with a house that looks totally different from what you had in mind because you did not express your vision explicitly or appropriately for the architect to understand.

In short, make sure that you have project objectives that are SMART. They need to be crystal clear and understood by everyone actively involved in your project.

3.3 Vision vs. Project Objectives

Both project vision and project objectives have to be worded in a way that your project team can relate to them. They serve as guidelines. As such, everyone on your project team needs to be able to translate them into directives for their daily project work. This is why they need to have the same understanding of the meaning and scope of the vision and the project objectives.

Needless to say, your project objective needs to be in sync with your vision. To a certain extent you can say that project objectives are a subset of the project vision. Project objectives solidify your vision, help produce tangible results. The project objectives describe the means to achieve your vision in a given time frame, the means to make it happen. From this perspective, project objectives concretize the project vision.

When you use the picture of the pyramid project objectives, ensure that there is a link between the vision (the tip of the pyramid) and the foundation of the pyramid (the results). The vision provides the overall direction for your project. The project objectives do the same but are more specific about the desired project results at the lowest level of the pyramid. The closer you get to the pyramid, the better will be your understanding of what exactly the project results will look like. You will get a clearer picture the closer you get to the final destination of your project journey.

At the beginning of this journey you may have a faint idea of the end results. missing value SMART project objectives frame the lowest level of the pyramid. The closer you get to the pyramid, the better picture you will have of what else comprises the base of the pyramid (i.e., project results).

For example, when you train for your first marathon you may set out a target time (e.g., less than 4 hours). The more you train you will get a better idea if the original set target time is feasible or not. Once you have mastered preliminary races as preparation for the marathon, such as a half marathon, you will get an even better idea how fast you can run the whole marathon. Right before the marathon the objectives are clearest. But it is not until after the race that you know if you have achieved the goal you initially set and possibly modified during the weeks of training.

Both project vision and project objectives are crucial for project success. Together they set the direction and tone of your project journey. They complement each other. The vision inspires your journey. It defines the purpose of your project. The project objectives tell you more about the destination. You lose or skip either one of them and your project is unlikely to succeed. A project vision without project objectives may give you an idea of the direction, but you may never get close enough to the destination to produce tangible results at a certain time. On the other hand, project objectives without a vision may describe the desired end result and time frame, but they cannot inspire the necessary enthusiasm in your team to drive the project to success. They do not form an underlying meaning for the work. It makes a difference if you tell workers to put one brick on top of another, to build a wall or to start work on a cathedral. If you prefer project objectives without the corresponding project vision you will end up with lots of brick layers. Their main motivations may be to earn the money. They come in the morning, work, and leave in the evening. The workers who have a vision of building a cathedral may actually conduct the same activities as the first worker, but their work attitude and motivations are likely to be different. They know that they are devoting their time and effort to something big.

The closer you get to the pyramid (i.e., the closer you get to the end of your project), the clearer a picture you will have about project results. In most situations it is virtually impossible to describe the final project results at the beginning of the project journey. However, the vision in its nature changes less frequently. It thus serves as the compass for the project objectives. However, it is *the combination of project vision and objectives* that sets the direction and describes the destination of your journey.

3.4 Building Vision: First Steps

There are endless ways and means to build vision. I can sketch only a few in this book. In Part II of the book I offer concrete examples and templates you may want to apply in your project. They are far from being complete but should give you an idea of what is possible. At this point let me suggest some basic principles of what it takes to build vision in your project.

To begin, you need to acknowledge your utmost motivations for the project. The motivation can be to solve a problem or to create something new. Let's first have a look at the motivation to solve a problem. For this purpose, answering the following three questions will help you pinpoint the core of the problem:

1. What are the top issues or risks?
2. Who is affected by these issues or risks?
3. What are the impacts of the issues or risks?

Going through this exercise makes you analyze your present situation and isolate the actual problem. Who knows, maybe you find out after this exercise that there is actually no problem. Even better. Or you may realize that the problem is different from what you initially thought. This, too, is great. It helps save a lot of energy. Can you imagine if you started a project to solve a problem that does not actually exist?

In addition to the first three questions, you can ask, "why?" For example: *Why* are these the top issues or risks? *Why* do these issues or risks affect the identified persons or organizations and not others? *Why* do these issues or risks have such a great impact on them? If the answers do not get down to the true core of the problem, continue to ask "why?" until you have identified the true core of the problem. It is this issue you want to address and which drives your effort to find a solution.

Once you have identified the cause of the problem, go beyond it and outline possible solutions. Answering the next three follow-up questions will help you in doing so:

1. What needs to be done to resolve the situation? Why?
2. What benefits can we expect from the improved situation? Why?
3. What do we need to do to achieve this? Why?

If the motivation to start your project is not problem oriented, but instead you want to create something new, you can modify the questions, as follows:

1. What are the top solutions or opportunities you envision? Why?
2. Who is interested in these solutions or opportunities? Why?
3. What are the effects of the solutions or opportunities? Why?
4. What needs to be done to bring about the new situation caused by the solutions or opportunities? Why?
5. What disadvantages will the solution have or bring with it? Why?
6. What do we need to do to overcome these disadvantages and obstacles? Why?

Input for answering the questions may come from several sources. You may account for company goals, market demand, results of previous projects, responses to competitors, etc.

Once you have answered all questions, summarize your findings in one or two sentences. This is the *motivation statement* of your project. It may be tedious to find the right wording, but it is worth it. This exercise forces you to specify the motivation. Just like you did for the project vision and objectives, you want to phrase it so that everyone on your team can understand and relate to it.

Composing a *vision statement* comes next. In your vision statement, describe the *ultimate* solution to your motivation. Start with the end in mind. The answers to questions 4 through 6 above should provide you enough input. At this point it is less important to describe all details of the desired end state than to get a broad picture of *what* the end result will be and how it will feel to get there and have it.

Next, document your vision statement. This is not a formal or administrative exercise. Documenting your vision statement helps you to phrase it in a way that is understandable to others, because you don't want to keep this vision to yourself. You want to share it with others. Understanding the vision is one thing; ensuring the support of others to achieve it is another thing and actually one key to project success. This is why sharing your vision is so important.

AU: What Do you mean by this? ("So much for sure.") I don't understand

Building vision cannot be done overnight. So much for sure. Plan sufficient time to build the vision, involve others (especially your team), request feedback, and refine and qualify your vision. Note that it may not be possible to have a vision that is shared by everyone actively involved in your project. In this case you may want to start your project with a set of workshops that help clarify the vision and break down its elements into project objectives and requirements. We will revert to this point in Chapter 10.

3.5 The Person Who Builds Vision

At this point you may ask if it is always the project leader who develops the project vision. For example, you may be assigned to a project management role where the vision and project objectives have been defined for you. You may have no influence on the project vision statement. True, this can indeed happen. It is probably not so uncommon in the first place. Note, however, that we are not talking about the role of the project manager but the role of project leader. Project leaders make themselves responsible for both project vision and objectives. If there is neither, the project leader is responsible for developing them and ensuring that they are mutually agreed upon by everyone actively involved in the project.

missing value

If there is a vision, whether a project vision or corporate vision that has to be taken into account when realizing your project, it could have been defined, authorized, or given out by a project sponsor. Regardless, as a project leader you *must* make sure that both are in place. Corollary, project leaders do not start a project without a project vision and objectives. If you want to be or become a project leader, you either build vision and project objectives or make sure that both are in

place, are crystal clear, and are mutually understood by every single person actively involved in the project.

3.6 Characteristics of Vision Builder

This distinguishes a project leader from a project manager. Project managers may accept what is given to them. They swallow whatever they are given to eat. They react, don't ask questions, and manage the project according to the principles and side constraints set out for them. Project leaders ensure that the direction is defined and clear. They go beyond the dutiful administration of a project.

You may want to compare a project leader with the skipper of a ship. Experienced skippers know where they have to go. They have a mission to fulfill. They will not leave the harbor until the mission is clear and all preparations for the journey are complete. It is their job and responsibility to lead the crew in the right direction. Of course, they cannot achieve the mission by themselves. They need to build and have a functioning crew. Every crew member fulfills a distinct role. But it is not the accumulation of individual crew members that make up the functioning crew. All crew members must know what is expected from them. And vice versa, all crew members have to know what they can expect from others. The skipper then has to build a crew that functions as one unit. Only together can the skipper and crew sail the boat and accomplish the mission.

In the end, however, it is the skipper who is responsible for the direction of the journey and who communicates it to the team, ensuring that everyone understands the direction of the journey.

Ask yourself who you are on your project. Are you the project leader who acts as the skipper? Or are you just a crew member, fulfilling your duties as a project manager. When we talk about project leadership we expect the characteristics and responsibilities of a skipper. This means that you are well aware that you need your crew to accomplish the project mission. This is why you want to build a functioning and performing team. At the end of the day you initiate this process. You start with building vision, developing a performing team, and ensuring delivery. In other words, project success starts with you as the project leader.

3.7 It Takes a Project Leader — and a Team

As the skipper, as the project leader, you are responsible and accountable for leading your team. You are accountable for setting up, running, monitoring, delivering, and closing the project. Now, in the real world, project managers are often held responsible but not accountable for the outcome of a project. But even if you are not accountable, that is, your head is not at stake, project leaders *always* act as if

they are accountable. This does not mean that a project leader is the most important person on the team. This is as far from the truth as it can be. Project leaders know that they cannot achieve the project objectives alone. It takes a team to do so. You, as the project leader, are part of this team.

It is a misconception that project leaders are the “boss” of their teams, in the sense that they are the autocratic leader of a number of people formed more or less loosely together in a team. Officially, you may lead your project team, supervising the individual team members. But make no mistake; project leaders understand that they rely on their team. As such, they are part of the team, behaving and acting as members and fulfilling their role and responsibilities. Without the team, project leaders cannot achieve anything substantial. Take again the example of a skipper at sea. Skippers may certainly dictate the direction. From this perspective they may be the #1 person on the ship. And they need all others to fulfill the overall mission. A project leader may tyrannize the team, and this could actually help achieve the project objectives. However, it is highly unlikely that things would be done smoothly and this approach will hardly ever produce long-lasting effects.

We will look at the significance of team building and involvement in the next chapter. For the time being, keep this in mind: It takes a project leader to build vision — and a team.

3.8 Timing of Building Vision

Now, let’s briefly talk about the seemingly obvious: When is the right timing to build vision? You build a vision of your project *before* project initiation because the project vision sets the overall tone of your project. It defines the direction of the project and puts it into perspective. It frames the project environment and constitutes the purpose of the project existence in the first place.

AU: Please clarify

But is it then that the most obvious is way too often not too common after all? This is an excellent question. It takes us back to our insight in Chapter 1: Common sense is not equal to common practice. Once I worked on a technical project where there was no vision, where the project objectives were neither clear nor mutually understood. The project was doomed to fail and failed it did. The lack of vision moved the project to a roller coaster, to a maze without a clear end in sight. When the project manager in charge realized, he tried to correct and adjust the course midway, while everything was at full speed (i.e., during the project, while all other project activities were still in full swing). Did it improve the overall situation? Yes, insofar as the project manager could say that he tried to build vision and adjust project objectives to a changing environment. No, because the project did not change its overall direction at all. Actually, there was no overall direction to start with and no direction after the little “vision building” by the project manager. The project continued to slide down the path to project failure. Frustration grew and quality suffered. The interesting thing was that the project did produce results. However, it

did not meet the originally stated requirements. In addition, the project vision was neglected and forgotten. Interestingly, the original vision of this technical project was not technical in nature at all. It was business driven and it was about the end customer. Forgetting about this vision, the team focused solely on the technical features of the solution. Business factors and aspects of user experience were given less importance. This became obvious during the end-user acceptance tests. Simple yet typical end-user scenarios were flawed or did not function at all. In the end, the project failed from both a technical and a business perspective.

What we can conclude from this example is that you want to make sure that you build vision before the actual start of your project. If you want to build vision during the course of a project, this is possible. However, you should be well aware of the fact that you may have to throw away some or everything of what you produced to that point in time. After all, by building or adjusting vision you are changing the course of the project. It may be possible to use some of the past deliverables, but there is no guarantee. What counts is that the new vision sets the right direction for the project.

You may even be tempted to build project vision after the project is over, maybe to justify poor project results. This is possible. But note that this has nothing to do with project leadership and certainly nothing to do with project success. Instead, it is an example of poor judgment and lack of business ethics. If you want to build a solid foundation for project success, build vision *prior* to project start and refine it with the help of project objectives and regular deliverables.

3.9 Value of Building Vision

As time consuming as vision building may be, it yields precious rewards you cannot live without if you are interested in leading your project to success. The motivation statement describes the initial environment. It helps you focus on a specific situation you want to change or create. The vision statement describes the solution you have in mind. You break down the vision into its various specifications and develop a SMART project objective statement. The project objectives help structure your solution requirements.

The motivation, vision, and project objectives statements all form a solid foundation for successful projects. If you miss any one of them, the chances for project success are decreased. This is why you want to make sure you develop all of them at the beginning of your project. Ensure that they are consistent, that they complement each other, and that they form one unit.

Make sure that this unit is commonly understood and supported by everyone involved in your project team. Ideally, you involve your team in developing the motivation, vision, and project objective statements.

Things change during the course of a project. For example, specific requirements may have to be modified and even some of the project objectives may change. The vision should be least likely to change; it stays stable. If it changes, the overall

direction of your project changes. In this case it may be best to terminate your initiative and launch a new one.

Start with a unified vision and know where you stand before and during your project. This is your utmost responsibility as project leader. A project leader takes the initiative to build vision. This is the #1 prerequisite for project success. Also as a project leader you do not work alone. Know your environment, know your potential, and identify your limits and overcome. Build and involve your team and nurture effective collaboration across the board. This brings us to the second leadership principle: nurture collaboration.

3.10 Application Suggestions

1. Analysis of the past:
 - a. Think about a past project that succeeded.
 - b. What motivated the project in the first place?
 - c. What was the overall project vision?
 - d. What were the official project objectives?
 - e. How did you contribute to the development of the project motivation, vision, or objectives? What could you have done differently?
2. Application of principles in the present:
 - a. Think of a present or upcoming project.
 - b. Write down a motivation statement for the project.
 - c. Develop a vision statement.
 - d. Break down the vision into its components and derive project objectives. Make sure that they meet the SMART criteria.
 - e. Compare them with official statements of your project. Where and how do they differ?

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