

CCLEARNING

**A Practitioner's Guide to Professional Development
in
Portfolio, Programme and Project Management
(P3M)**

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Introduction

Good practitioners in portfolio, programme and project management (collectively referred to in this paper as P3M professionals) are in demand for their qualifications, skills and experience in delivering the benefits of increasingly complex change. This is providing opportunities for challenging and rewarding careers.

The question is, what is a 'good practitioner' in today's market, and how do current and aspiring P3M professionals become one?

'P3M professional' refers to people considering entering the profession, existing permanent staff, consultants and contractors. The scope of the roles covered includes governance, executive management, project and programme delivery management and support functions, for example in P3M Offices (PMO's).

Three aspects of professional development

P3M professionals ask me questions or seek advice regarding their professional development in three main areas:

1. Skills and experience
2. Qualifications and accreditations
3. Career development.

For each of these areas, I have summarised the key points, posed typical questions professionals ask, defined the terms used, and provided some introductory guidance, illustrated by actual experiences and references to relevant resources.

Note: the terms 'practitioner' and 'professional' are each used in specific contexts by different standards bodies. In this guide I use both terms generically to refer to people working in P3M.

1. Skills and Experience

Key Points

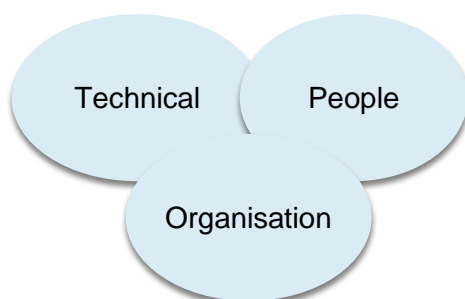
- Consider opportunities that represent the best stretch challenge, not necessarily the best paying in the short term.
- Work to achieve a 70:20:10 balance of learning by on-the-job experience, ways of leveraging that (communities of practice, coaching, action learning, peer networking) and formal training.
- Continuously balance development of your technical management skills, people skills and organisational skills.
- Assume there is no money for training, and then think creatively about your development: this approach ensures the best opportunities are not missed.
- Make your own luck; build a Professional Development Plan (PDP).

Typical questions

“What knowledge and skills do I need to be good at in order to do my job now? How do I go about getting them, and building the right experience?”

Consider P3M skillsets and experience in three categories:

- Technical management skills; e.g. planning, estimating, controlling.
- People skills; e.g. handling teams, sponsors, stakeholders, regulators.
- Organisational Skills; getting things done in an organisation’s cultural and political environment.



Gaining experience requires improving from doing, not simply doing more. Twenty years’ experience without improvement is simply one years’ experience repeated nineteen times.

Definitions

Knowledge:

Facts, theory, concepts, information, understanding.

Skills:

The ability to do something, (generally to a standard).

Driving example:

Knowledge - road code, basic vehicle mechanics

Skill - the ability to apply that knowledge to drive on the road.

Competence:

The ability to combine knowledge and skills to agreed standards, (e.g. legal, safety). Broadly speaking, there are two approaches to defining and assessing competence (1):

- Attribute based: knowledge, skills, and other characteristics are identified and assessed. Competence is inferred based on the presence of the necessary attributes.
- Performance based: work outcomes and performance levels are identified and assessed. Competence is inferred based on the demonstrated ability to satisfy the performance criteria.

Performance:

The execution of competence within a range of conditions (performance criteria, e.g. road surface, speed, weather).

Experience:

Performance that improves over time.

Note: these terms are scalable, meaning they can be applied to an individual, team, project, programme or portfolio.

Examples of how organisations develop skills and experience

1. Programme Management

Have you ever heard an organisation say ‘this is by far the largest and most complex programme we’ve ever attempted’? At that point there is a question as to what extent the programme, and the organisation as a whole is sufficiently capable of taking it on. Here’s three approaches used by organisations to address that. As a P3M professional, understanding the approach being deployed in the organisation is helpful in considering whether it will provide you with suitable opportunities to develop the skills and experience you need.

1. Leverage existing skills.
 - a. Proceed with existing skillsets, no new investment.
 - b. Manage consequences if any, banking on the cost of remediation coming out less than by not investing up front.
2. Buy in skillsets.
 - a. Contract in necessary skillsets; treat as a programme expense.
 - b. Decide about a level of knowledge and skills transfer into the organisation.
3. Invest in retained capability.
 - a. Plan for the development of necessary skillsets of existing staff in advance of the programme. Stay ahead with high levels of reflection and learning.
 - b. Recognise, reward and retain top performers.

2. Technical skills

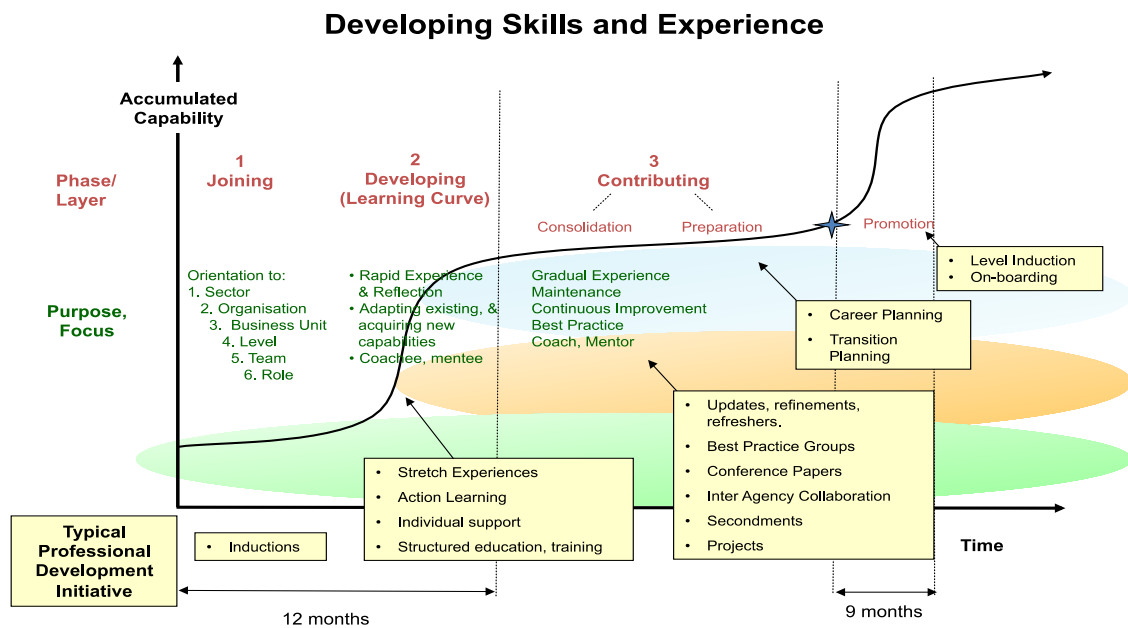
An organisation wanted to introduce Agile software development into the IT component of a business project. The business project manager and her leadership team had no prior knowledge, qualifications or experience in Agile. Because this was a first for that organisation, there was much interest in both how it would work as a new approach to project management, and by individuals wanting to become trained and accredited, sometimes regardless of whether they had an immediate need in their current projects. The organisation managed this professionally in a ring-fenced environment, complete with lessons learned and a community of practice session devoted to the trial. Since that time, agile project management has become an established project management discipline in its own right, with some evidence of its IT origins.

3. People skills

As part of a restructuring exercise in an organisation, programme managers were given line management responsibilities for their programme team members, including performance management and career development for their ‘staff’. This was a shift from their existing skills and experience as programme managers, and in their approach in how to lead and manage their programmes. This had implications for individual programme team members and the programme budgets. Programme managers with line management experience adapted relatively easily, and over time a peer or collegial approach emerged amongst them.

Guide to developing skills and experience

The diagram below is a useful planning tool for P3M professionals and for organisations looking to support their development. It's based on the premise that developing skills and experience (vertical axis) happens over time (horizontal axis). A P3M professional's development activity in any given role occurs along their personal S-Curve (the black curved line) in three phases: Joining, Developing and Contributing. Each phase includes a mix of structured experience, reflection time and formal education and training. Typical examples for each phase are outlined in the boxes.



Phase One: Joining

P3M professionals take responsibility for their own development, and look for the right mix of onboarding activity from those shown on the diagram to meet their needs. Establishing a mentor to help navigate this is especially valuable.

Phase Two: Developing

This is 'the steep learning curve' representing the rapid acquisition of knowledge skills needed in a new organisation or role. It may be highly contextual to the organisation.

Phase Three: Contributing

There are two phases in the Contributing phase – Consolidation and Preparation.

Consolidation - involves gaining experience over time. Implicit in this phase is the principle of supporting others coming up the earlier stages in the learning curve. This could involve leading communities of practice, coaching and mentoring others, and/or the development and delivery of course material. These aspects of a P3M professional's role help to differentiate more senior roles from entry positions; a senior business analyst, senior project or programme manager, or sponsor for example.

During this phase a project professional may progress to 'senior' either by gaining more credentials (discussed in the next section), and/or by a system of classifying projects by increasing complexity, and the professional being assessed as competent to manage higher classification of project.

Preparation - refers to those aspects of development the P3M professional undertakes as part of preparing for the next step in their career. This includes 'acting up' opportunities, preparatory training and credentialing, targeted experiences, and letting go old networks and forming new ones.

Putting it all together - Professional Development Plan

A Professional Development plan, or PDP, is a purposeful approach to the activities required in each of the three phases. There's an old quote that says 'if you don't have a plan for how to achieve your next position, you'll be beaten by someone who has'.

2. Credentials: Qualifications and Accreditations

Key Points

- Build your credentials based on your personal mission and professional context, the sectors you work in, and the types of projects and programmes you aspire to.
- Build your credentials with your career development in mind (see next section).
- For experienced practitioners without credentials, consider having your skills and experience recognised in a qualification by a process known as assessment by professional conversation.
- Join a professional association, or user group as a minimum, to stay networked and current with developments in your profession.
- Keep your credentials current and valid in your personal branding; CV, LinkedIn profile, business cards, business cases, proposals for work etc. If one has lapsed, consider carefully the implications of continuing to use it.

Typical Questions

"What credentials, if any, do I need now, and in the future?"

How do I make sense of the raft of offerings of credentials, courses, and providers?"

Why are they so diverse?"

Who pays? Who should?"

The Credential Dilemma:

"To invest or not to invest; that is the question".

The P3M profession has qualifications and accreditations available nationally and globally. The question is how to approach them in a way that adds best value to current roles and future opportunities.

In New Zealand the three significant sources of qualifications and accreditations in the P3M profession are

- AXELOS formerly known as OGC (Office of Government Commerce)
- NZQA - New Zealand Qualifications Authority.
- PMI - Project Management Institute

Refer to the professional standards setting bodies for their current qualifications, accreditations and their criteria for gaining and maintaining them. Contact details are appended.

Because of the multiple sources of credentials, the situation has arisen where a P3M professional can hold and display an extensive list of acronyms after their name.

Note regarding accreditations:

Before the expiry or renewal date of an accreditation, the accredited person is required to submit some sort of evidence of knowledge or practice, such as re-sitting an exam, or submitting a portfolio of current practice for consideration by a professional body. There is generally a fee associated with that re-certification or accreditation. It's worth checking whether the qualification or accreditation gained can be used against your name; most are under the terms and conditions set by the standards setting body.

Emerging capabilities in a changing world

Arguably the *content* of the profession is well defined with credentials and bodies of practice. Equally arguably is what's becoming increasingly less defined is the *context* in which the profession operates. Recently the size and complexity of some transformational changes taking place within organisations, sectors, and even whole economies is creating demand for a different skill-set of professional; that of Business Transformation. In this arena existing credentials, for example Managing Successful Programmes (MSP®), may be deemed necessary but not sufficient. Organisations and their recruitment agencies are looking for people with much wider breadth of experience and perspectives than even the most qualified and experienced P3M professionals.

Definitions

Qualification:

A certificate, diploma or degree that once awarded, is held indefinitely by the recipient.

- Valid for life.
- No expiry date.
- No ongoing requirement to maintain their currency or validity.
- Costs associated with gaining a qualification, but no on-going costs.
- Examples are bachelors, masters and post-graduate degrees, national certificates and diplomas.
- Certificates of attendance are not qualifications.

Accreditation:

A license or permission for the recipient to use and reference the accreditation.

- Only valid for as long as the recipient meets the criteria prescribed by the standards setting body responsible for it.
- Can have an expiry date or renewal date.
- Costs in acquiring the accreditation.
- Costs in renewing accreditation.

Credentials:

Qualifications and/or accreditations held by a P3M professional at a given point in time.

Emerging skillsets for a complex world

- Complexity, Sense Making
- Organisational Agility
- Strategic Thinking
- Authentic Leadership
- Cultural Savvy
- Commercial Savvy
- Transformational Change
- Organisational Development

Case Scenario

A senior programme manager once approached me with his dilemma; he had a proven track record and relevant industry experience but no formal qualifications. He had focused on successfully and sustainably delivering results for over a decade, and had kept up his professional knowledge and skills current with reading, networking, short courses and coaching.

The unintended downside of his approach to his career had begun to put him increasingly at a disadvantage when applying for roles requiring relevant qualifications as a minimum. He discovered that recruitment agencies and employers each have their individual approaches, strategies and policies covering qualifications and credentials of P3M professionals. Setting aside other selection criteria for the moment, all too often our programme manager's track record and ongoing professional development wasn't enough to get him hired.

For him the plethora of qualifications, credentials, and their professional institutions and training providers all seemed to be competing with each other for market share, professional status and money. In so doing they created, in his mind at least, a confusing array of possible and expensive pathways for him to gain any sort of relevant qualification.

In summary, our programme manager is of the view that the approach and deployment of qualifications and credentials is confusing, expensive, and potentially not as strategically fit for purpose as it once was.

My experience in organisational and capability development suggests our programme manager is not alone with his dilemma.

Guide to navigating credentials

There are several papers written on the merits of choosing whether to align with PMI or AXELOS credentials, or another source. Some recommend having both PMI and AXELOS, citing their complementary nature. None I can recall recommend a P3M professional having none, so the consideration is that it's important for a P3M professional to hold credentials relevant to their individual professional practice.

In New Zealand and other countries there is a process known as assessment by professional conversation, where an experienced practitioner can gain a National Qualification up to and including degree level, as managed by the New Zealand Qualifications Authority. This involves the candidate preparing a portfolio of evidence and having a 'professional conversation' assessment by an NZQA accredited body. The candidate's evidence holistically against the qualification sought.

While these credentials can come to be known and understood to some level within the profession, it can pose a bewildering challenge to those seeking to make sense of it all, which includes individuals looking to enter the profession, to hire or contract a professional or to manage one. In general, the more credentials held the greater the amount of professional learning and knowledge a P3M professional has. What is less apparent is the nature of that professional's experience, currency of practice and competence for a given role.

The cost/investment of acquiring qualifications, and in maintaining any certification or accreditation, say every five years, either has to be met by either the employer, or by the employee, or not at all.

3. Career development

Key Points

- Choose your approach to your career: Planned or Strategic Opportunism.
- Begin with the end in mind:
 - Create a Personal Mission Statement
 - Consider retirement planning before/with your career planning.
- Create your Ideal Role based on your strengths.
- Think and plan 2 jobs ahead.
- Be prepared for multiple 'careers'.
- Separate your career planning from your current job: End of business financial years is for the organisation, not for you. Do your career planning when you're in your personal context (for example a long holiday).
- Your service is to the organisation; your development is personally cumulative.
- Know yourself, be yourself: Assessment tools are your lifelong friends.
- Apply strengths based leadership to yourself and others.
- Do the hard yards work on your mind-set; it beats skill-set hands down, every time.
- Give more than you get. Sharing it with others helps you know it for yourself.
- Own your career; it's yours: don't be a WIIFM (what's in it for me) victim.

Typical Questions

Where am I heading with my career?
What options are there for advancement?
How do I make good decisions about opportunities?

In my career development conversations with P3M professionals I note they have emerged from three broad categories:

Definitions

Strength:

An activity that makes you feel strong; that strengthens you.
(Marcus Buckingham)

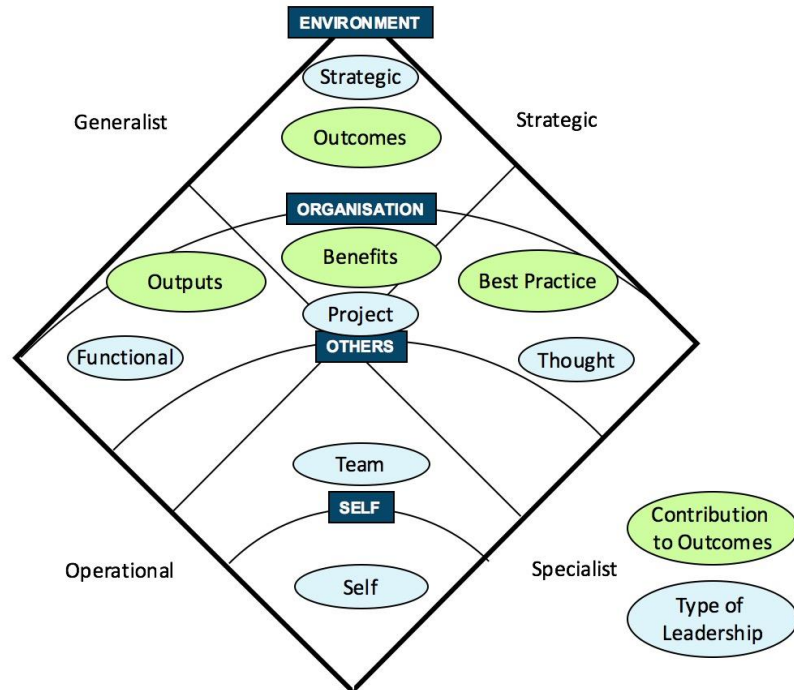
Strategic opportunism:

Taking advantage of previously unknown opportunities towards a strategic career goal.

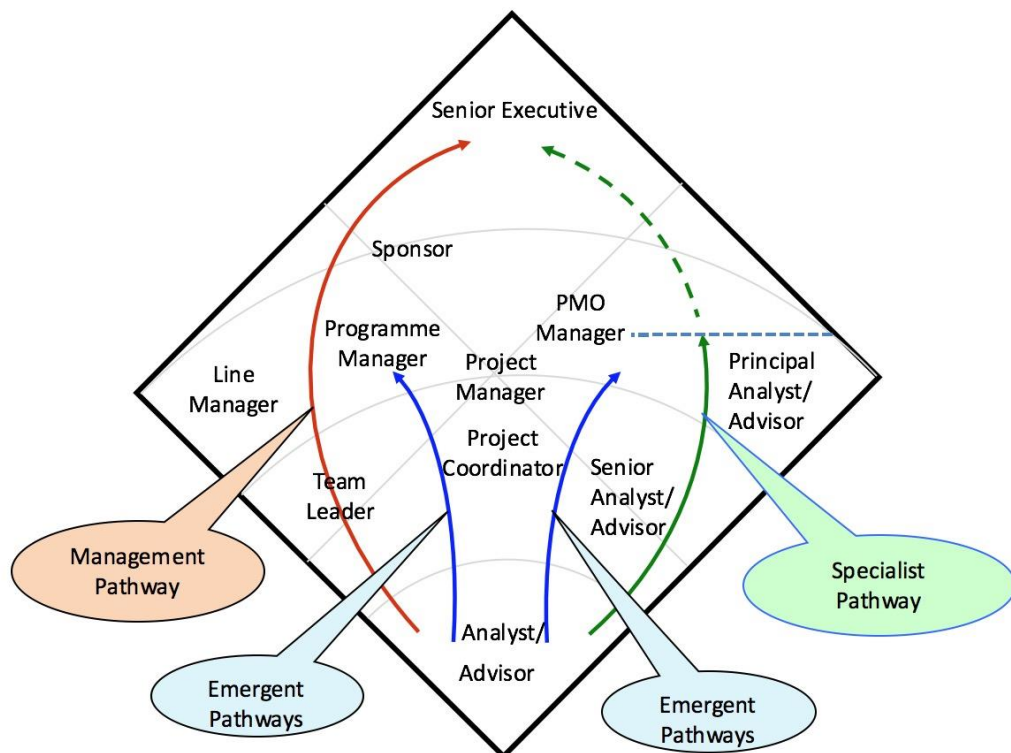
1. People with a particular set of subject matter expertise or skills get assigned to a project team, like the project environment and 'start at the bottom'.
2. Generalist managers with organisational knowledge and skills in a particular area of the organisation's business are asked to manage projects in their line of business, but do not initially have any project management credentials or experience.
3. The career P3M professional, who sets out with some aspect of P3M, generally project management, as their first career choice.

Guide to Career Development

The concept of a career pathway for P3M professionals can be discussed with reference to a Whole of Career Map I have developed over time.



This map represents the 'landscape' for an organisation, on which all the positions can be represented depending on their positions on the vertical scale (Operational to Strategic), and horizontal scale (Generalist to Specialist). The blue labels show the type of leadership (self, team, functional etc.) predominating in a region of the map. The larger labels show the primary nature of the contribution to organisational performance from each domain. Roles within an arc are of similar job size. Here is how P3M roles can be plotted on the map.



Notes:

- The three career pathways, which are generally referred to in three broad categories: management, specialist and emergent.
- The thick black line represents the potential limitation of the specialist pathway to the most senior roles in an organisation, although this is not the case where the organisation has a high specialist component in its purpose that needs representation at the most senior level.

Summary

Relative to other professions, 'modern era' Portfolio, Programme and Project Management is young; approximately three generations. Opportunities abound for the P3M professional who earns a track record as a good practitioner. Three aspects of professional development have been identified and discussed.

In the area of skills and experience, I introduced the Individual S-Curve and emphasised the need to be 'planful' about the building of induction, development and contributing phases in an individual development plan.

Regarding credentialing, I emphasised the benefits of a fit-for-purpose approach for each person's circumstance and aspirations, some commentary about navigating the credentials market, and provided examples from workplace practice about how that can and is being applied.

The final area put it all together, by considering P3M from a career development perspective. I've developed and introduced a whole of career map and associated support services to facilitate how a P3M professional can approach their career development.

I thank all those P3M professionals and organisations I've been privileged to work with over the years. This introductory guide is my distillation of their stories, in the hope that it informs the stories of those who read, and apply it.

About the author

Brian Carson's mission is improving personal and business performance. He uses his strengths in strategy, facilitation, design and personal development to lead and shape thinking and embed realisable breakthrough change. Brian has breadth and depth of experience in consultancy and management roles in the corporate and public sectors. His career has traversed project engineering management, strategic and business planning, strategic account management, learning and development, leadership and organisation development, career development, and more recently portfolio, programme and project management capability. Brian is currently consulting and contracting to organisations in P3M, leadership, organisational development and culture change.

His accreditations include MoP®, AgilePM®, Hogan Assessment Tools and Team Management Systems. Brian is a member of the Human Resources Institute of New Zealand, and a Community Member of DSDM and the Change Management Institute.

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References

Major institutions providing P3M credentials in New Zealand:

AXELOS	https://www.axelos.com/
New Zealand Qualifications Authority	www.nzqa.govt.nz/
Project Management Institute:	www.pmi.org/
	www.pmi.org.nz/

A brief history of project management:

<https://www.projectsmaart.co.uk/brief-history-of-project-management.php>

Ted.com:

Larry Smith: Why you will fail to have a great career

Ken Robinson: How Schools kill creativity, and his book: The Element.

Elizabeth Gilbert: You elusive great genius

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