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# ***Balancing Process & Creative Freedom***

This article discusses one of the biggest challenges companies have in developing new products and/or running projects in a matrixed environment.

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# Balancing “Process” & “Creative Freedom”

Is your organization either too process-oriented (having difficulty innovating) or too creative (having difficulty getting projects completed)? This article discusses how to balance these competing priorities – in a way that helps you move your company forward, faster.

Project management has proven itself to be an invaluable tool in “*getting things done*” within today’s complex organizations. However, there are also stories of failed attempts at project management where the “process” eclipsed the project itself - where the team/organization became so obsessed with following the process they lost track of the project objectives. The challenge for the CEO is in maximizing the benefits of project management (speed to market, efficient organization of complex efforts, and meeting customer and business needs), while minimizing unintended consequences.

## **So what is the problem?**

The failure rate of projects is anywhere between 30% to over 60%, depending on what study you read and what industry you’re in. Although the number is arguable, anywhere near a 30% failure rate demands attention. And project management is usually the (best) answer. However, it can be over-applied and misunderstood.

## **Overprocessed?**

Although organizations need structure, they’re often too focused on implementing processes – without looking at their culture and project goals.

In the world of project management, structure is the mantra. Yet even though processes and methodologies are proven, necessary and effective, organizations can become too bogged down in them. And that can lead to a loss of the agility and creativity needed for projects to be truly successful.

*PM Network* (the Project Management Institute’s monthly magazine) interviewed the author on the topic of how to move projects forward, faster. Their questions – and his answers – are presented here, with permission.

### **Is structure always needed – or are there times to loosen up?**

Being able to strike the right balance between structure and freedom to do your own thing is arguably one of the foremost PM success factors. Unfortunately, there is no easy answer, because finding the sweet spot is very specific to the organization and situation.

Also, I want to point out that this is a “project management” and not “project manager” success factor. There’s no doubt the project manager is critical to project success, but if you focus on only the individual, you’ll miss the bigger picture of the overall project management environment. When management puts the onus totally on the project manager, they’re really passing the buck and looking for individual heroics to carry the organization.

### **How can organizations implement agility in their structure?**

Start by recognizing that process is scalable. Also, it’s easier to scale down than up. So I like to see organizations put together a comprehensive structure at the project management office (PMO) level with scalability guidelines, *then* allow the project manager to scale it down based on the project situation at hand. On the people side, team members – and the functional managers that assign them to projects – need to be well trained on what it means to work in the project environment.

### **When is structure most important?**

I start by looking at three characteristics to determine the level of structure required: [1] the goals of the organization (short vs. long term), [2] the culture of the organization (how decisions are made and work is accomplished) and [3] the specific project at hand (similar to past projects or not). All of these are arguably complex and span the spectrum from one extreme to the other. An example that might warrant the most structure would be a weak-matrix, consensus-driven organization with a long-term investment perspective, performing relatively repeatable projects. Say a large company working on regular incremental software releases.

### **Is there any situation in which structure is not as important?**

The opposite of the above situation: a strong matrix, authoritarian-driven organization with a short-term investment horizon, performing highly innovative, never-been-done-before product development projects. For instance, a start-up high-tech company with an exit strategy of being acquired in the next 12 months. Of course, these examples are broad generalizations.

### **Does too much emphasis on structure cause companies to lose their competitive edge?**

Certainly, if your company fits the bill of the high-tech / high-growth company described above, then too much structure will slow you down, thus dulling your competitive edge. However, if you’re like the large company example and lack a robust structure, then emphasizing the implementation of one will arguably provide a long-term competitive advantage.



### **Whose responsibility is it to create that balance?**

I see this as a shared responsibility between senior management, the PMO and the individual project managers. First, senior management needs to work with the PMO to build a project management process framework to complement its culture and goals. Second, the PMO should work with the project managers to understand how the boundaries within the framework can change based on the needs of the specific project at hand. And third, the project manager needs to scale as appropriate to bring out the value of the structure. And these three steps must take place in order. If steps one and two are solid, then most project managers will do fine on the third. However, without steps one and two, we're back to depending on the individual heroics of the project manager, which is really hit-or-miss.

### **How do PM software tools affect the balance?**

I like tools that are both simple and have an embedded workflow/process. Simplicity implies ease-of-use and therefore makes them more likely to increase PM *efficiency*. Workflows, especially those that are flexible, provide guidance on best practices while enabling the PM to adjust tool usage to the specific project at hand, therefore increasing PM *effectiveness*.

### **Summarizing**

It is very important to take the long view when modifying / adjusting your organization, processes and personnel skills. These critical elements should be considered, when balancing process with creativity:

- Processes should be customized to the organization's culture and project goals. Some companies require a more stringent approach than others.
- Organizations must seek a balance between creative freedom and strict adherence to processes. Going too far on either side can hurt the company's competitiveness.
- (Senior) management should buy in and set the processes, but it's up to project managers to adapt them to the project at hand.

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### **Author's Biography**

Gary is a consultant, author, and trainer with 20+ years experience applying project management to product/process development efforts, primarily in the high-tech and life sciences fields. Some clients include Becton Dickinson, Abbott, Baxter Healthcare, and Illumina. He is the author of "Agile Project Management," which focuses on improving PM effectiveness in fast-paced and dynamic environments, as well as, the American Management Association's #1 best selling course, "Improving your Project Management Skills, the basics for Success." Gary holds a BSME from Rensselaer Polytechnic Institute, an MBA in product marketing from Bentley College, and PMP certification from the Project Management Institute.



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