Global Complex Project Management
An Integrated Adaptive Agile and PRINCE2 LEAN Framework
for Achieving Success
By Robert K. Wysocki & Colin Bentley
(A book review by R. Max Wideman, FPMI)

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Introduction

Newcomers to general project management might be forgiven for assuming from the title that this book is the answer to achieving success in large difficult projects of any kind. However, those more informed will know from the mention of "Agile" that this book is primarily for Information Technology and/or corporate software development practitioners. Indeed, it is as much about Product Development Management as it is about Project Management.

Nevertheless, given that clarification, the book is a masterly treatise in great detail on their new approach to effectively managing and delivering the products of complex and mission-critical projects in the Information Technology (IT) and High Technology (HT) industry/product sectors. This is especially true of those projects typically attempted in large corporations and the public (government) sectors.

The objectives of the authors of this book are particularly interesting. That is because Colin Bentley was the lead author of a small team of four, including Colin, responsible for coordinating the input from expert representatives of some twenty UK companies interested in upgrading the original PRINCE2 (P2) draft. The result of that effort was the 250-page *Managing Successful Projects with PRINCE2* edition released in 2005. This version of P2 became well known in Europe and was seen as the major competitor to the Project Management Institute's *Guide to the Project Management Body of Knowledge*.[1]

However, both are seen as being heavy in process and documentation and more suited to managing the creation of large physical products such as in civil infrastructure and the like. And, in contrast, not suited to the more social environment of Information Technology with its software development components. Hence the efforts by the above authors to develop a more relevant product development framework for the IT arena that, as observed in the title of this paper, is called PRINCE2 LEAN (P2 LEAN).

Clearly, the target audience for this book is best suited to those project and product practitioners engaged in large complex projects in the IT and HT sectors. Having said that, the book could also be of interest to other project management practitioners looking for the more specific tools and techniques that the authors have described in some detail.

About the authors

Robert K. Wysocki, PhD, has over 45 years of combined experience as a project manager, business analyst, business process consultant and trainer, information systems manager, systems and management consultant, author, and training developer and provider. He has written 25 books on project management and information systems management. One of his books: *Effective Project Management – Traditional,*

Adaptive, Extreme has been a best seller for years and is currently in its seventh edition. His most recent book is entitled: *Effective Complex Project Management – An adaptive Agile Framework for delivering Business Value* published in 2014 by J Ross Publishing. He resides in Worcester, Massachusetts, USA.[2]

Colin Bentley wrote the original *PRINCE2* manual for the Central Computer and Telecommunications Agency (CCTA), and was the author of all revisions until the 2009 version. He was also the Chief Examiner for PRINCE2 from its beginning until 2008 and wrote all the Foundation and Practitioner Exams. Used extensively by the UK Government, *PRINCE2* is also widely recognized and used in the private sector, both in the UK and internationally. For many, it is the preferred choice when compared with the Project Management Institute's *A Guide to the Project Management Body of Knowledge.* In his retirement, Colin has been working on project management methodologies for complex projects, as well as for small projects. He lives in Waterlooville, Hants, UK.[3]

Book Structure

The content of this book is set out in sixteen chapters, separated into five parts and two Appendices as follows:

Part 1: Overview
    Chapters:
1. Introduction
2. Overview of the Effective and Complex Project Management Framework
3. PRINCE2 LEAN: Are You a Cook or a Chef
4. PRINCE2 LEAN: Project Planning

Part 2: PRINCE2 LEAN and the IDEATION Phase
5. Preparing the Business Case
6. Creating the Project Product Description
7. Preparing for the Initiation Stage

Part 3: PRINCE2 LEAN and the SET-UP Phase
8. Designing the Project Approach
9. Selecting the Project Core Team
10. Preparing the Project Initiation Document (PID)

Part 4: PRINCE2 LEAN and the EXECUTION Phase
11. Preparing for the Next Stage
12. Executing the Stage Plan
13. Closing the Stage
14. Closing the Project

Part 5: Putting it all Together
15. Organizational Infrastructure
16. Benefits of the PRINCE2 Lean Framework

Epilogue
Appendix A: Glossary
Appendix B: Reference Bibliography..

The book has a total of 296 pages and these include the Appendix A Glossary with its more than 130 entries.

What we liked

Chapter 1 introduces the concept of a P2 LEAN Framework for planning and managing complex IT and HT projects that the authors define as follows:[4]

> Definition: P2 LEAN Framework
>
> The P2 LEAN Framework is an integration of selected artifacts from the ECPM Framework and the P2 Framework in order to create not just an agile and lean version of P2, but a better framework for handling complexity in projects. Thus
>
> P2 Framework + ECPM Framework = P2 LEAN Framework

If you have difficulty in understanding that, you will find the Glossary[5] at the back of the book most helpful. Indeed, we particularly liked the availability of such an extensive Glossary of terms, many of which are very specific to the type of work described in the book.

This book is well written and in a clear style.[6] It is also well illustrated by charts, diagrams and boxes presenting specific highlights. Given the comments presented earlier, we would describe the book's content as not necessarily easy reading but rather academic and relatively heavy reading for all but those already immersed in large complex IT and HT projects. Nevertheless, it is highly interesting for its re-purposing of tools and techniques that are known to be reliable and realistic in the project domains of other industry and product sectors.

We particularly liked the systematic way in which the book's content is laid out. As previously listed, there are four Parts that cover: (1) An Overview of the Integrated Adaptive Agile and PRINCE2 LEAN Framework that the authors have devised; (2) An "Ideation" phase; (3) A set-up phase; (4) An execution Phase; followed by (5) A wrap up summary: "Putting it all together".

The chapters are similarly well constructed in that all begin with some relevant classic quotations to brighten the chapter going forward, and then clearly describe the chapter's learning objectives. Finally, after presenting learned content, each chapter concludes with a "Putting it all together" paragraph as a chapter wrap-up. It is also worth noting that for a project to be managed under the described system, there is significant work to be done in the early Phases and their respective Stages before you get to the Execution Phase. We mention this because there are many PM practitioners who think or feel, wrongly, that a project does not really begin until actual product is begun being produced in the active stages of the Execution Phase.

Some examples of the above-mentioned introductory quotations follow:

> "It is a mistake to look too far ahead. Only one link of the chain of destiny can be handled at a time." Winston Churchill, English Prime Minister.[7]

> "Objectives are not fate; they are direction. They are not commands; they are commitment. They do not determine the future; they are the means to mobilize the resources and energies for making the future." Peter F. Drucker, Management consultant and writer.[8]

> "To tend, unfailingly, unflinchingly, towards a goal, is the secret of success." Anna Pavlova, Russian ballerina.[9]

Some of the benefits claimed for using P2 LEAN are described in the book as follows:[10]
- "P2 LEAN uses established and proven best practices and governance for project management."
- "P2[11] is flexible, but using its flexibility takes a lot of experience. The chapter on tailoring the method just doesn't get you there on its own. P2 LEAN actually explains *how* to tailor the method."
- " P2 LEAN has adjusted the P2 project responsibilities, but we believe it has made the organization structure more effective, certainly for complex projects."
- "P2 has a good *management by exception* philosophy, but P2 LEAN with its agile concept of rigid time and cost parameters for a stage, removes a huge percentage of the exception situations. Problems and unfinished work are put in the Scope Bank for evaluation when planning the Next Stage."

If the project management approach can achieve those ideals in the types of project described, then a close study of this book is well worth the time and effort spent.

Downside

The following are relative minor issues but, we think, are worth mentioning.

Chapter 1 starts out by saying (in part):[12]
> "This chapter will provide readers the knowledge or ability to:
> - Understand the similarities and differences between PRINCE2 (P2) and the Effective Complex Project Management (ECPM) Frameworks."

That all sounds well and good until you suddenly start asking:
> "What exactly does 'ECPM' stand for in the first place, and what does it mean in practice?"

Well, it turns out that "Effective Complex Project Management" is a term for a process encompassing "An Adaptive Agile Framework for Delivering Business Value". This process was introduced by Robert Wynsocki himself in a publication of those names, back in 2014. So, it appears that if you want to fully understand the contents of this book, you have to buy another book as well – and read and understand that, too.

Chapter 5 – Preparing the Business Case: This includes a section titled "Starting Up a P2 LEAN Project"[13] and includes a simple diagram showing just three processes involved in Generating the Business Case.[14] These processes are (1) Appoint the Project Executive;[15] (2) Capture Previous Lessons;[16] and (3) Prepare the Business Case. The section then goes on to describe seven rather mundane items of organizational content, none of which mention the extent of the financial commitment anticipated, and the corresponding benefits to be expected. In other words: "Is the project worth doing and, if not, cancel it right now to avoid any further wasted expenditure!" But to be fair, a subsequent section does describe the P2 LEAN Business Case as typically including, among other basic things:[17]
- A financial analysis comparing alternative project ideas;
- A prioritization of the alternative project ideas; and
- The incremental business value that will[18] result.

Chapter 6 describes the P2 LEAN approach to "Creating the Project Product Description". This includes "Drafting the P2 LEAN Project Brief" that in turn includes a section titled "Problem/Opportunity Statement".[19] Some readers will no doubt find some disappointment here – not because of the book, but because of what the methodology, rightly, sets out to do.

The section states:

> "A well- defined need, and a clear solution path to meet that need of a *want*, define a project that the traditionalist expects. [However,] A rather vague idea of a want, coupled with a vague idea of how it will be satisfied, defines a P2 LEAN Project that complex Project Co-Managers expect."

The section goes on to say:[20]

> "The problem or opportunity that this project is going to respond to must already be recognized by the organization as a legitimate problem or opportunity that must be attended to. If anyone in the organization were asked about it, he or she would surely answer: 'You bet it is, and we need to do something about it.' In other words, it is not something that needs a defense. It stands on its own merits. Furthermore, the problem or opportunity statement must be expressed in terms that anyone in the organization who would have reason to read the statement could understand without need for further explanation."

Summary

Two distinguished thought leaders in the world of IT and HT projects have developed this unique reference book. It provides a new approach to the challenge of effectively managing complex and mission-critical projects. That is, it is designed to deliver maximum business value to organizations in both the public and private sectors around the globe. It draws on the strengths of different schools of thought and best practices to develop an integrated framework that is lean, agile, flexible, and adaptable for virtually any complex project.[21]

The benefits claimed for the use of the methodology described in this book are the same as those described for the use of P2. Some examples of the benefits claimed are:[22][23]

- P2 LEAN uses established and proven best practice and governance for project management.
- P2 is flexible, but using its flexibility takes a lot of experience. The chapter on tailoring the method just doesn't get you there on its own. [Whereas] P2 LEAN actually explains *how* to tailor the method.
- P2 LEAN has adjusted the P2 project responsibilities, but we [the authors] believe it has made the organization structure more effective, certainly for complex projects, which is where we are at. The structure defined in P2 LEAN also provides accountability and authority, and we believe that it improves on P2 in terms of delegation and communication.
- P2 has a good management by exception philosophy, but P2 LEAN with its agile concept of rigid time and cost parameters for a stage removes a huge percentage of the exception situations. Problems and unfinished work are put into the Scope bank for evaluation when planning the Next Stage.

In other words, the rigors of traditionally rigid project management are applied at the Stage level rather than across the board at Phase level. Given the need for flexibility in developing the products of IT and HT projects, that sounds like a very good compromise.

R. Max Wideman
Fellow, PMI

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[1] *PRINCE2* is an acronym for PRojects IN Controlled Environments. It is a de facto process-based method for effective project management. *PRINCE2* is widely used in the private sector, both in the UK and internationally.

[2] Abstracted from *Global Complex Project Management* pp. xvii-xviii

[3] Abstracted from *Global Complex Project Management* pp. xviii-xix

[4] Ibid, p5

[5] See Appendix A. This Glossary contains a significant number of definitions and Acronyms that are specific to the type of product development described in the book.

[6] This is assuming the reader recognizes the time and effort required to absorb the new ideas and approach that are presented here by the authors.

[7] Ibid, p61

[8] Ibid, p121

[9] Ibid, p201

[10] Ibid, p245

[11] Ibid, P2 — That is to say PRINCE2, the original European project management methodology – competitor to PMI's PMBOK Guide.

[12] Ibid, p3

[13] Ibid, p90

[14] Ibid, p91

[15] In other words, the Project Manager and any deputy and co-managers that may be necessary for a very large project.

[16] Capturing previous lessons learned is an important step too frequently overlooked in more traditional projects.

[17] Ibid, p93.

[18] Or rather "*should* result".

[19] Ibid, p125

[20] Ibid.

[21] Ibid, text adapted from remarks printed on the back cover of the book.

[22] Ibid, abstracted from page 245

[23] Note that Colin Bentley was responsible for the production of *PRINCE2: A Practical Handbook, Third Edition*, (Oxford, UK: Elsveres Ltd.) back in 2010. So Colin is effectively quoting his own work.