

Targeted Relationships: A Project Management Consulting Maturity Model

By Philip W. McDowell, PMP

Executive Summary

Have you ever wondered why your project management consultants can't or don't generate more business from their existing customers? Have you ever wondered how you can get more from your experienced, educated, and professional program managers?

Ponder these questions:

1. What are the differences between a client and a customer and why should you care?
2. What distinguishes a program manager from a project manager?
3. Can a program manager do more for you than efficiently and effectively managing clusters of similar projects; and, if so, under what types of conditions or in what kinds of relationships?

Seasoned successful leaders know the answers to these questions. The vast majority of project and program managers, however, answer question number 1 with: "it doesn't matter," and "no one." Within the information technology world, consultants, contractors, service providers, and vendors know the differences between clients and customers. The evolution of the relationship between the client and customer is often the difference between a long-term, robust relationship and a one-time engagement.

This paper provides insight into the differences and similarities between project and program managers, differentiates between the client and customer, and defines several relationship levels between project/program managers and clients/customers.

Who Should Read this White Paper?

Although anyone with an interest in project and program management should find parts of this article beneficial, it is primarily geared toward project and program managers working as consultants, contractors, service providers, or vendors. This document is also helpful for the client and customer who engage project and program managers.

Finally, if you cannot answer all three questions posed in the Executive Summary, you should read this paper as well.

Distinguishing Clients from Customers

Oftentimes in consulting and service companies, the terms "client" and "customer" are used interchangeably. However, the astute consultant (project management or other discipline) should keep the main difference in mind: the customer is

the person who “pays the bills.” All other decision-makers and influencers with whom you may work in the customer’s company or organization are clients.

Two things to remember: (1) the customer has priority over the client(s), because that’s who pays the bills; and, (2) clients and customers may have different priorities, motivations, political alignments, interests, and desire different outcomes. Keep the customer’s interests and priorities in mind first, until such time as the clients become the customers.

Differentiating Between Project and Program Manager Levels

Isn’t a program manager simply a senior project manager or just a more experienced project manager? The answer to the first part of this question is: no! And the answer to the second part is: yes, more experienced but not “just.” The characteristics and attributes below help to distinguish the different skill levels of a project manager and a program manager.

Project Manager

Target Qualifications:

- Entry-level to advanced project management experience and skills
- High-school graduate or bachelor’s degree
- Project management methodology, tools, and techniques training

Characteristics during Engagement:

- Project-specific resource
- Tightly focused project view
- Aligns with customer’s business analyst

Senior Project Manager:

Target Qualifications (add to project manager’s qualifications):

- Journeyman to advanced project management experience
- HR exposure
- Communications training
- Project-level financial management

Characteristics during Engagement:

- Complex or multi-project resource
- Broader project view
- Aligns with customer’s project sponsor

Program Manager:

Target Qualifications (add to senior project manager’s qualifications):

- Advanced project management experience and training
- Bachelor’s or advanced degree
- Consulting training and experience
- IT accounting guidelines (capital versus expense, and so forth)
- Business development exposure

Characteristics during Engagement:

- Program resource
- View across customer’s organization
- Aligns with customer
- Participates in decision-making meetings

Senior Program Manager

Target Qualifications (add to program manager’s qualifications):

- Significant consulting experience
- Experience working on teams with other companies (some, potential competitors) for customer benefit
- Refined communication techniques
- Profit and loss experience
- Sarbanes-Oxley requirements
- Global customer experience

Characteristics during Engagement:

- Multi-program or portfolio resource
- View across customer’s company
- Aligns with customer and client(s)
- Participates in direction-setting and decision-making meetings

Different Focus Requires Different Skills

Depending on the customer needs and priorities, a project manager or program manager must take on numerous roles. For the purposes of this discussion, we will describe two roles, each requiring different qualifications; each interacting with the customer in different ways; and each providing different value to the customer and the project manager’s employer.

By the nature of their role and work, project managers at all levels consult and deliver. Although it may appear ideal for an experienced, professional project manager or program manager’s focus to be directly in the cross-hairs intersection of a horizontal “delivering” line and a vertical “consulting”

line, the reality of that situation would not be ideal when maturing the individual into a senior program manager position. Individuals can stagnate in the world of delivery, when the greater value for the individual, the customer, and the employer rests in progressing into the world of program management consulting.

Delivering

Project managers and senior project managers are normally engaged to structure and deliver specific projects, complete with the rigor that accompanies a Project Management Professional (PMP)[®]-certified professional. Their value is determined by how well they manage the triple constraints of cost, schedule, and scope.

Although some senior project managers are called on to consult on options for structuring and delivering future projects, many are not, because they are being paid to deliver what's currently assigned to them. Make no mistake: there is value in that role. But to earn a spot at your customers' table, a project manager who aspires to grow into a program manager role must learn to deliver **and** consult, sometimes simultaneously.

Consulting

Consultant behavior is less about completing an assigned project or set of projects and more about getting in tune with your customer's strategic initiatives and needs. At times, consulting with your customer may have little to do with project delivery, at least on the surface. But, remember, a key to earning your customer's trust is keeping their confidence and delivering their projects on time, within budget, and meeting the stated requirements.

Most progressive service companies and vendors, and certainly consulting firms, provide training in the art of consulting. However, the soft skills that make a good consultant are difficult to teach; they must be practiced and honed, and there's no formula, template, or tool to foster consultant behavior.

The ability to actively listen and communicate, internalize your customers' (or your clients') strategic initiatives and needs, and offer implementable options are not things one learns in most basic project management classes or by delivering projects. This is a thought process — not a project delivery or implementation approach, methodology, technique, or tool.

Four Types of Customer/Client Relationship Levels

All the previous ideas and information in this paper have led to this point – what relationship levels can a project manager identify and work toward within a customer's environment? And what value does each relationship level hold — for the individual, customer, and employer?

There are four relationship levels:

1. Project Management Resource (R1)
2. Project Management Advisor (R2)
3. Trusted Advisor (R3)
4. Partner (R4)

The initial relationship level is **Project Management Resource**, or **R1**. This level is gained when the customer needs a skilled resource to manage a project, and the project manager delivers.

- Positive. Skill recognition for the individual and a known resource the customer can call on again.
- Negative. Potentially, the project manager will be pigeon-holed and may not quickly get the opportunity to earn the next relationship level.

This is the normal relationship a project manager has with the customer.

Project Management Advisor is the next relationship level – **R2**. Once a project manager has proved him or herself and gained esteem in the customer's eyes, he or she may be called upon to take the next step; that is, to help the customer structure and lead future projects, beyond the one(s) the individual was brought in to manage.

- Positive. This puts the project manager in a closer, increased-value relationship with the customer.
- Negative. The individual is still seen as a project manager only.

This is the normal relationship a senior project manager has with the customer.

The third relationship level, **R3**, is **Trusted Advisor** (sometimes known as **Honest Broker**). This level is earned by reputation and performance and by providing value across the customer's organization at this consulting level. Yes, this is where the pendulum swings from delivering to consulting.

- Positive. The project manager is gaining a strategic foothold and his or her future is not tied to a single project or set of projects.

- Negative. Without the right level of experience and continuing support from the project manager’s company, this could become a tenuous position.

This relationship level is often achieved by program managers.

Being seen as a **Partner** is the ultimate customer relationship level (**R4**). In this role, the project manager is focused primarily on consulting on a variety of issues and topics with the customer, leaving delivery to more junior project managers. This level is normally achieved by senior program managers through the give-and-take needed to gain the customer’s trust and confidence, and by crafting innovative solutions to meet the customer’s strategic needs.

- Positive. This potentially opens doors throughout the customer’s company, even outside their own organization, enabling the consultant senior program manager to gain clients (and potentially additional customers) across the customer’s company.

- Negative: This relationship level can be damaging to all concerned if the consulting project manager is not a very senior person and very experienced. This individual should have developed an extensive relationship network in her or his company, and potentially within other complimentary or competing IT companies. These non-customer relationships will enable the project manager to craft viable options to meet the customer’s complex needs.

This relationship level is normally the responsibility of a senior program manager.

A Model for Consideration

The model in Figure 1 should help to bring all the preceding ideas and information together.

There are three bidirectional arrows in the middle of the model, which signify a partial continuum in the model and in practice:

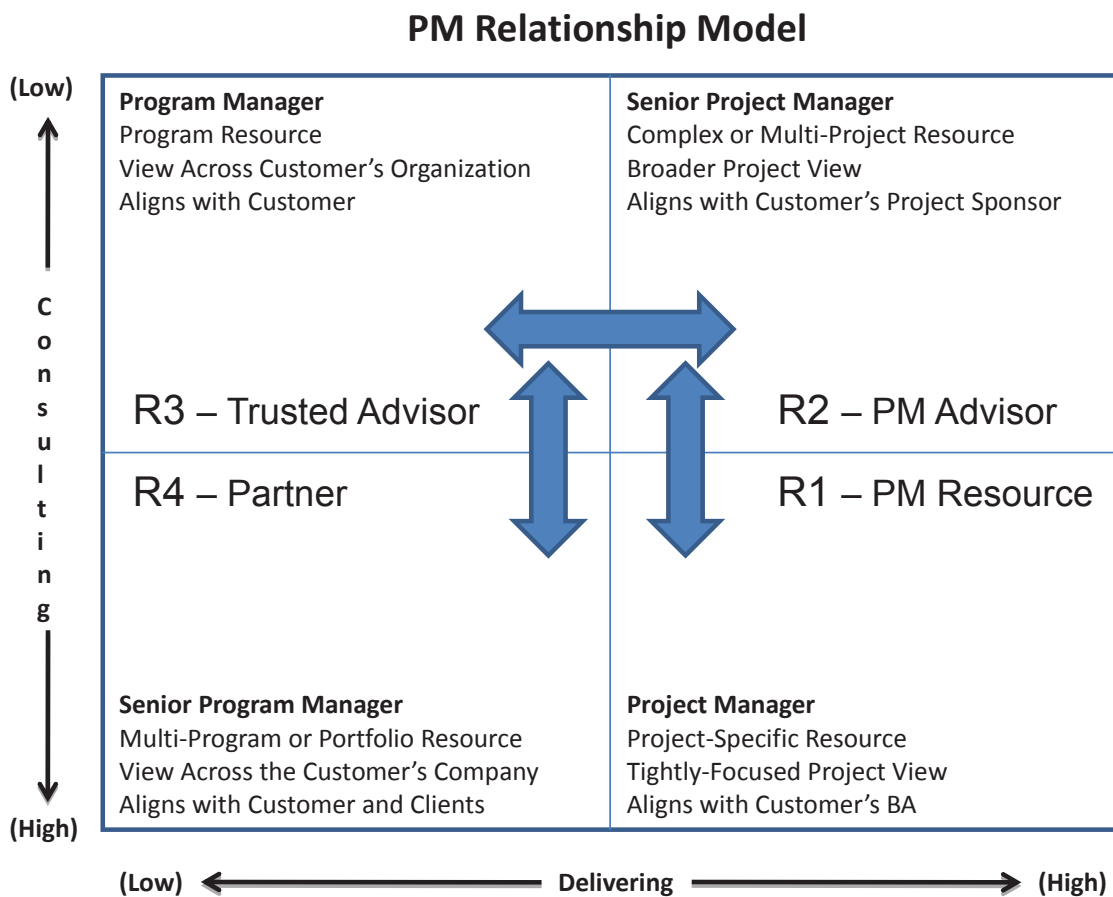


Figure 1 - Project Management Consulting Maturity Model

- Project managers and senior project managers can easily move back and forth between R1 and R2.
- Senior project managers and program managers often move back and forth between R2 and R3.
- Program managers and senior program managers move back and forth between R3 and R4.
- It is very unusual for any level of project manager/program manager to advance or retreat more than one step away from his or her current relationship level.

Conclusion

Although many of the definitions, attributes, characteristics, and ideas presented in this paper could benefit “internal” project and program managers (people acting in those capacities/roles inside their companies), the larger benefits are for consultants, contractors, service delivery professionals, and vendors. Although each level of project manager and program manager has its rightful and valuable place in the

world of project and program management, it is helpful to have a view of options for progressing upward to senior levels of program management. Establishing, growing, and maturing relationships with customers and clients are important factors in the career progression of project manager and program managers.

About the Author

Phil McDowell has over 20 years of experience in the IT project and program management field working for and with numerous Global Fortune 500 companies. Currently, Phil is a senior program manager for Cisco Systems in the Advanced Services organization. Phil has developed and delivered global projects and programs in Belgium, Canada, Germany, South Africa, the United Kingdom, and the United States and he has experience in the automotive, financial, federal government, manufacturing, and healthcare/medical device industries.