MULTILEVEL LEARNING IN THE PROJECT-BASED CONTEXT

By Anna Wiewiora, Artemis Chang, and Michelle Smidt
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Multilevel Learning in the Project-Based Context

Project learning is a vital prerequisite for innovation as it directly contributes to project and organizational capability development. As more organizations become project-based, there is an emergent need to understand how these organizations can overcome challenges of disruptive learning cycles caused by project temporality and employee mobility.

Project learning occurs on the individual, team, and organizational level. Individual learning happens through intuiting and interpreting, learning by doing, experiencing, using metaphors, and cognitive maps. Team learning occurs through the integration of individual learnings which result in shared understanding and mutual adjustment of mental models. Organizational learning manifests itself in the development of practices, policies, guidelines, and routines for the collective benefit. However, how organizations facilitate the transfer of learning between the individual, project, and organizational levels remains limited.

Project-based learning occurs within projects, between projects, and as an output from projects to the wider organization (Brady & Davies, 2004; DeFillippi, 2001; Grabher, 2004; Prencipe & Tell, 2001; Söderlund, 2008). Studies investigating project-based learning tend to focus on a single level of analysis; only a few studies explain the interrelations and dynamics between organizational, project, and individual levels and their impact on building organizational learning capabilities.

This research was guided by the overarching question: "How does project learning occur over time as an interaction across individual, project, and organizational levels?"
Key Concepts

*Feedback learning:* learning related to exploiting existing and institutionalized knowledge and making this knowledge available for project teams and individuals

*Feed-forward learning:* learning related to exploration of new knowledge by individuals and teams and institutionalization of this knowledge on the organizational level; this learning is transferred from individuals to team to organization

*Multilevel learning:* learning that occurs and/or involves the individual, team, and organizational level through the processes of intuiting, interpreting, integrating, and institutionalizing

*Intuiting:* the process of recognizing familiar patterns from past events and situations; intuiting can occur only at the individual level

*Interpreting:* the process of sensemaking and reshaping new knowledge through individual and collective efforts by using metaphors, images, and language

*Integrating:* the process of developing a shared understanding at the team level through collective actions, dialogue, shared practices, and mutual adjustment

*Institutionalizing:* the process of embedding individual and collective learning in the organization’s systems, structures, strategies, routines, and practices

*Project-based organization (PBO):* conducts a significant part of business through temporary projects

*Project manager:* the individual in charge of planning and executing a project

*Project management office (PMO):* an organizational unit that supports projects; this unit helps project managers, teams, and management with functional and strategic issues

*Spider web leadership (SWL):* a leadership approach that provides structure and an environment for multilevel learning
Methodology

Three separate but thematically interrelated projects were conducted: systematic literature review, in-depth longitudinal case study, and survey.

Figure 1 captures the key objectives and results from each of the three studies.

Firstly, a **systematic literature review** was used to select, analyze, and synthesize the latest literature on project learning. After a careful selection process, the number of papers was systematically narrowed from a total of 2,789 papers to 38 papers. These 38 papers became our data set, which we used for further analysis.

A single, **in-depth case study** was conducted in a global PBO operating within a food processing and packaging sector to determine how project learning occurs as an interaction between individual, project, and organizational levels and what organizational actors are involved in facilitating linkages between the levels. Data collection occurred from January 2015 to August 2016 and comprised two rounds. 38 respondents represented different organizational levels including: project members, project managers (PMs), project management office (PMO) staff, and top-level managers.

A self-administrated **online questionnaire survey** was conducted to develop and test new multi-dimensional leadership scale to reflect leaders’ roles in facilitating multilevel learning. Participants engaged in project work were recruited through the authors’ professional networks and social media. Results were drawn from the sample of 94 respondents who completed the survey. Sixty-five (69%) respondents were from Australia, and 29 (31%) were from other countries including the United States, the United Kingdom, etc. This sample included 39 (42%) females and 55 (58%) males, aging from 22 to 67 years old. The respondents worked in IT (20%), finance (12%), and various other industries.
Objective: Identify bridging mechanisms in multilevel learning, document how they work, and determine current knowledge gaps.

A systematic, process-based approach was used to select, analyze, and synthesize the literature (Duriau, Reger, & Pfarrer, 2007; Pawson, Greenhalgh, Harvey, & Walshe, 2005). Selected papers served as a data set for the analysis. The search commenced by selecting a number of terms commonly used to describe multilevel learning and the project-based context. We then selected synonyms commonly used to describe these three categories, as depicted in Table 1.

Table 1 Search terms.

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Multilevel category</strong></td>
<td><strong>Learning category</strong></td>
</tr>
<tr>
<td>Multilevel/multi-level</td>
<td>Learning</td>
</tr>
<tr>
<td>Micro and macro</td>
<td></td>
</tr>
<tr>
<td>Individual and project</td>
<td></td>
</tr>
<tr>
<td>Individual and organization/organization(al)</td>
<td></td>
</tr>
<tr>
<td>Learning process(es)</td>
<td></td>
</tr>
<tr>
<td>Project-based corporation</td>
<td></td>
</tr>
<tr>
<td>Inter-project</td>
<td></td>
</tr>
</tbody>
</table>

These search terms were then inserted into two search engines—ABI/Inform and EBSCO Host—that offer access to the widest range of journals in the relevant research area. We then narrowed the search to abstract, title, and subject area to select literature with an explicit focus on multilevel learning. After a careful selection process, the number of papers was systematically narrowed from a total of 2,789 papers to 38 papers. These 38 papers became our data set, which we used for further analysis.
Objective: Explore how project learning occurs as an interaction between individual, project, and organizational levels in a global, project-based organization (PBO).

We commenced this research with some theoretical foundation to avoid rediscovering existing knowledge while remaining open-minded to new insights and discoveries. This approach allowed us to inductively build on existing theories through a systematic and continuous interplay between the literature and emerging observations.

A single, in-depth case study was conducted in a global PBO operating within a food processing and packaging sector to determine how project learning occurs as an interaction between individual, project, and organizational levels and what organizational actors are involved in facilitating linkages between the levels. Data collection occurred from January 2015 to August 2016 and comprised two rounds. Following purposive sampling (Miles & Huberman, 1994), 31 hour-long, semi-structured interviews were conducted with informants nested across four geographically determined clusters, with both fast and slow market speeds. Respondents represented different organizational levels including: project members, project managers (PMs), project management office (PMO) staff, and top-level managers. Table 2 summarizes our interview respondents and characteristics of the organizational clusters. All of the respondents interviewed had performed multiple roles within the organization, and the majority had worked in more than one country. The interviews were complemented by meetings with key contacts and a review of the company's documents and website.

<table>
<thead>
<tr>
<th>Clusters</th>
<th>Market speed</th>
<th>Specific locations</th>
<th>Number of interviews</th>
<th>Respondents’ roles</th>
</tr>
</thead>
</table>
| America            | Slow         | USA                                         | 4                    | Senior project manager
                                                                                       | Project manager
                                                                                       | 2 x Project management office manager |
| Asia               | Fast         | India, Indonesia, Japan, Malaysia           | 5                    | New product introduction director
                                                                                       | cluster projects capability coordinator
                                                                                       | Project manager
                                                                                       | Project team manager
                                                                                       | Project sales manager |
| Australia/Oceania  | Slow         | Australia and New Zealand                  | 5                    | Senior project manager
                                                                                       | 2 x Project manager
                                                                                       | 2 x Project management office manager |
| Europe             | Slow and fast| Sweden, UK                                  | 17                   | Supply chain director
                                                                                       | Global process manager
                                                                                       | Process director
                                                                                       | Capability manager
                                                                                       | 8 x Project manager
                                                                                       | Project management office manager
                                                                                       | 4 x Project management office personnel |
Objective: Develop and test new multi-dimensional leadership scale to reflect leaders’ roles in facilitating multilevel learning.

One key finding from the case study was the role that leaders play in facilitating environment and structure for project learning. Leaders were key unique actors within the system and were able to significantly influence the current structure to either support or inhibit learning. Comparing this finding with the existing literature, we found that there is no established measure of a leadership style that fosters learning in the project-based context.

This research employed a multi-stage design. Stage I focused on developing scale items to map the conceptual properties of what we called Spider Web Leadership (SWL). Stage II verified the assumptions that the identified items serve as indicators of SWL and have acceptable reliability. Stage III determined how well the measured variables represent the SWL construct and confirmed reliability and convergent and discriminant validity of SWL dimensions. Stage IV assessed the construct’s concurrent validity with an established leadership scale and predictive validity of an outcome variable—project collective learning.

Data were collected using a self-administrated online questionnaire survey. Participants engaged in project work were recruited through the authors’ professional networks and social media. Results presented in this paper are based on an initial sample of 94 respondents who completed the survey. Sixty-five (69%) respondents were from Australia, and 29 (31%) were from other countries including the United States, the United Kingdom, etc. This sample included 39 (42%) females and 55 (58%) males, aging from 22 to 67 years old. The respondents worked in IT (20%), finance (12%), and various other industries. All respondents were invited to complete a follow-up survey to measure team learning two weeks after the main survey.
Research Findings

We identified 11 bridging mechanisms for multilevel learning that project-based organizations can utilize to encourage learning from and to projects as outlined in Table 3. Details of these findings can be found in Wiewiora, Smidt and Chang (2018).

Our most notable contribution is the view of multilevel learning as a system where bridging mechanisms work together to enable feedback learning and feed-forward learning. This is illustrated in Figure 2. Some of the bridging mechanisms such as culture, leaders, organizational structure, and politics connect three levels in the learning process. Other mechanisms such as shared mental models, feedback, and networks appear more active in connecting only two levels—the individual and team levels.

Figure 2 Research Findings.
Organizational Culture

Learning-oriented cultural values such as flexibility, experimentation, and risk-taking positively impact feed-forward learning from the individual to team and to organizational levels. In project-based organizations, cultural frames of short-termism prevent individuals from engaging in learning activities and restrict opportunities for organizational learning.

Leaders

Leaders impact transfer of learning to and from the individual and team levels, and assist in the transfer of learning to the organizational level. They do so through promoting openness to diverse opinions, giving performance feedback, setting task challenges, influencing structure and social networks, and introducing policies and procedures conducive to knowledge creation and sharing.

Structure

Structure impacts learning from the individual and team level to the organizational level. In particular, centralized structures reinforce existing norms, whereas decentralized structures facilitate reflection and learning, support exploration of alternative solutions, and help diffusion of ideas. Moreover, moderate linkages between teams increase learning performance.

Politics

Individuals in power can use political measures, including their position of authority, to hinder or accelerate learning. This impacts feed-forward learning from the individual level to both the team and organizational levels as well as from team to organizational level.

Shared Mental Models

Learning between the individual and team levels is increased when individuals’ internal views of how the world functions are openly shared so there is agreement and understanding of similarities and differences.

Organizational Initiatives

Organizational initiatives assist learning from the individual to team level, from the team to organizational level, and from the organizational and team levels to the individual level. These initiatives include study circles, project reviews, informal discussions, conferences, physical room layout, and allocated time for learning.

Networks

Networks formed through study circles and workshops provide opportunities to learn from others, as do communities of practice. In this way, networks enable transfer of learning from the individual to the team level.

Feedback

Positive feedback facilitates reflection and encourages finding new ways of doing things. In this way, feedback impacts learning between individuals. On the other hand, lack of feedback can hinder the creation of individual and shared mental models, and thereby obstruct learning between the individual and team levels.
## Temporality

In the project-based context, temporality plays a critical role as projects are often divided into distinct phases that dictate deliverables and consequently dictate appropriate times to experiment. The temporary character of a project coupled with a logic of a permanent organization affects feed-forward learning from the individual to project level.

## Employees

Regardless of the position they hold, employees can influence learning through their actions which are shaped by their identity, stress level, relationship with their work team, and perceived status. Employees can impact learning from the individual to the team level via their own actions.

## Major Events

Serious incidents with momentous consequences shift mental models. As a result, new processes and routines are created to prevent similar future incidents. Thus, major events catapult learning from the individual to the organizational level.

### Table 3 Bridging mechanisms for multilevel learning in organizational and project-based contexts.

<table>
<thead>
<tr>
<th>Bridging mechanisms</th>
<th>Activities and triggers</th>
<th>Project-based specific activities and triggers</th>
<th>Levels of learning</th>
<th>Learning direction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Culture</td>
<td>Specific cultural and sub-cultural values, norms, and artifacts impact learning flows</td>
<td>Cultural frames focused on time pressures and short-term orientation restrict multilevel learning</td>
<td>Individual → team/project Individual → organization</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td>Leaders</td>
<td>Leaders influence access to diverse opinions and knowledge Influence formation of social networks Use power and hierarchical position to influence learning flows Translate values and provide formal systems and training</td>
<td>Leaders who create interdependence restrict learning</td>
<td>Individual → team/project Individual → organization Team/project → organization</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td>Structure</td>
<td>Centralized versus decentralized structures, and degree of team separation influence learning flows</td>
<td>PMOs facilitate multilevel learning flows</td>
<td>Individual → organization Project → organization</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td>Politics</td>
<td>Political interventions are used to include/exclude actors in the learning process</td>
<td>Political interventions triggered by timing and pace of project activities impact learning</td>
<td>Individual → team/project Team → organization Individual → organization</td>
<td>Feed-forward learning</td>
</tr>
</tbody>
</table>
Table 3 Bridging mechanisms for multilevel learning in organizational and project-based contexts (continued).

<table>
<thead>
<tr>
<th>Bridging mechanisms</th>
<th>Activities and triggers</th>
<th>Project-based specific activities and triggers</th>
<th>Levels of learning</th>
<th>Learning direction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared mental models</td>
<td>Learnings occur through resolving tensions, shared understanding, dialog and negotiation, sensemaking, cognitive differences</td>
<td></td>
<td>Individual → team</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Team → individuals</td>
<td>Feedback learning</td>
</tr>
<tr>
<td>Organizational initiatives</td>
<td>Study circles, explorative learning activities, conferences, physical spaces, time for learning, rules and regulations, policies and procedures influence learning flows</td>
<td>Project reviews, risk registers, lessons learned contribute to multilevel learning flows</td>
<td>Individual → team/project</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Project → organization</td>
<td>Feedback learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Organization → individual</td>
<td>Feedback learning</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Team → individual</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td>Networks</td>
<td>Informal and formal interactions: workshops, communities of practice influence individual to team learning</td>
<td></td>
<td>Individual → team</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td>Feedback</td>
<td>Feedback triggers reflection and encourages learning and seeking improvements</td>
<td></td>
<td>Individual → team</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td>Temporality</td>
<td></td>
<td>Short-term focus on project deliverables, temporal structures restrict learning flows</td>
<td>Individual → project</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td>Employees</td>
<td>Employees’ individual characteristics: their personality traits, perception of status and identity, and stress level influence their knowledge-sharing behavior with peers</td>
<td></td>
<td>Individual → team</td>
<td>Feed-forward learning</td>
</tr>
<tr>
<td>Major events</td>
<td>Significant consequences from major events impact individuals’ mental models and organizational routines and practices</td>
<td></td>
<td>Individual → organization</td>
<td>Feed-forward learning</td>
</tr>
</tbody>
</table>
Case Study Results

Senior Leaders, project managers and PMO—key actors activating multilevel learning.

We identified three groups of actors—senior leaders, project managers, and PMOs—who facilitate cross-level learning at the interfaces between individuals, teams/projects, and the organization. Figure 3 shows that senior leaders are engaged in the transfer of learning across all three levels, while PMOs link individual and team/project levels to the organization, and project managers transfer learning from individuals to teams/projects.

All three types of actors influence feed-forward learning. However, we found no evidence of senior leaders and PMs contributing to feedback learning. Feedback learning was triggered only by the PMOs, which assisted in transferring learning to projects and individuals from the organization.

![Figure 3 Dynamics of multilevel learning in a global PBO.](image)

Key Actors in Multilevel Learning

Senior leaders have the power to facilitate interpretation, integration, and institutionalization of learning by making space for learning to take place, and by translating collective learning to influence project and organizational practices. Although senior leaders inherently hold a certain level of power and influence as part of their role, the extent to which they can exercise this power for learning transfer purposes is contingent upon how the organization delegates and enforces authority in practice.
Project managers drive the intuiting, interpreting, and, to some extent, integrating learning processes, but do not have enough power to institutionalize these practices. PMs utilize different conditions of the global PBO to engage in learning than senior leaders. For example, project managers use the culture of empowerment and exposure within an organization to take action, provide solutions to problems, and share those solutions with others in a team.

The PMO plays a key role in bridging learning between the individual, project, and organizational levels in both feed-forward and, to some extent, feedback directions. The capability to drive learning in either direction depends on the extent to which the organization provides the PMOs with the necessary tools, resources, and power. We found strong evidence that PMOs contribute to integrating and institutionalizing through the use of well-connected PMO networks. For instance, the global PMO monthly meetings are instrumental in enabling PMOs from various geographical locations to integrate and work toward the same goal of improving and standardizing project processes.
Survey Results

New leadership scale to measure leaders behavior promoting multilevel learning.

One key finding from our study was the role that leaders play in facilitating environment and structure for project learning. Based on that finding, we coined a new project leadership style which emphasizes leaders’ abilities to create structures and networks that fuel collective learning. We term this new leadership style “spider web leadership” (SWL) to capture the essence of leaders “threading” the learning spider webs. We developed and tested a new, multi-dimensional survey to reflect leaders’ specific behaviors in an effort to assess how they provide both the opportunities and the motivation to facilitate collective learning and fusions of new ideas within the project environment. The 11-item survey is shown in Table 4.

Our findings offer new leadership model which promotes collective learning. Leaders actions and behaviors, outlined in the scale, can be learned to facilitate environment and structure for project learning to take place. The 11-item SWL survey is an easily administered measure of leadership behaviors that trigger collective learning. This survey can be used to inform leadership assessment and training.

Table 4 Spider web leadership (SWL) scale.

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leader assists in making individual’s mental models explicit. (MME)</td>
<td>My project leader encourages me to explain my understanding of the know-how and know-why of the project. (MME1)</td>
</tr>
<tr>
<td></td>
<td>My project leader encourages me to explain the way I understand various project aspects. (MME2)</td>
</tr>
<tr>
<td>Leader provides social architecture (time and space) for creating opportunity to identify individual's diverse mental models. (SAO)</td>
<td>My project leader provides a physical or virtual space for connecting project team members. (SAO1)</td>
</tr>
<tr>
<td></td>
<td>My project leader provides opportunities for me to interact with people from my organization who are outside of my team. (SAO2)</td>
</tr>
<tr>
<td></td>
<td>My project leader ensures there is adequate time for me to meet relevant people outside the team. (SAO4)</td>
</tr>
<tr>
<td></td>
<td>My project leader encourages me to participate in informal networking opportunities. (SAO6)</td>
</tr>
<tr>
<td>Leader motivates subordinates to resolve conflicting mental models. (SAM)</td>
<td>My project leader encourages discussion of different understandings of issues among team members. (SAM1)</td>
</tr>
<tr>
<td></td>
<td>My project leader recognizes the benefit of sharing different opinions in the project. (SAM2)</td>
</tr>
<tr>
<td></td>
<td>I am recognized for my unique contribution to creating the team’s shared understanding. (SAM3)</td>
</tr>
<tr>
<td></td>
<td>My project leader encourages discussions to resolve different opinions among members. (SAM4)</td>
</tr>
<tr>
<td></td>
<td>My project leader encourages discussion to continue until conflicting opinions are resolved. (SAM5)</td>
</tr>
</tbody>
</table>
Recommendations to Practice

A number of practical contributions can be drawn from this study.

**Increase Brokering Capacity of a PMO**

When improving learning functionality of an existing PMO, it is recommended to give PMO personnel charge of the following responsibilities:

- Collect, classify, manage, and follow up on lessons learned from various projects.
- Offer coaching and mentoring sessions.
- Facilitate internal and external training sessions, workshops, and seminars targeted on building project management skills.
- Facilitate formal and informal interactions and collaboration between different organizational subunits, and provide opportunities for social interactions between PMs.
- Administer and provide some form of organizational coordination support and quality control assessment.
- Design and provide project managers with the necessary templates, guidelines, and checklists to conduct projects (e.g., risk assessment, lessons learned, quality control, budgeting).
- Regularly liaise with project managers to capture their practices and utilize the best solutions to inform project management standards.

**Ensure Long-Term Success**

In the project environment, the focus on schedule and budget means that project managers may not always have enough time to reflect on lessons learned or generate optimal solutions to problems. More proactive learning can be applied to save time and cost in the long term. This can be stimulated by:

- Active support from leaders who provide rewards to stimulate intrinsic motivation, such as verbal recognitions or empowerment to implement new solutions
- Allocating time for learning and knowledge-sharing activities throughout the project

**Promote Cultural Norms That Support Learning**

- The management team may consider introducing a knowledge champion certification to acknowledge information and knowledge-sharing initiatives. Employees who receive this award can add this to their profiles and CVs. This initiative will not only serve as prestige recognition, but also allow for a wider identification of individuals with expertise across the organization.
- The management team may encourage PMs and project team members to learn from each other by facilitating formal and informal networks. This can be accomplished by establishing communities of practice and organizing thematic workshops and forums.
## Dissemination of Research

<table>
<thead>
<tr>
<th>Mode of dissemination</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>An evaluation and recommendation report was given to our partner organization, “Exploring Learning Dynamics and Developing Knowledge Capabilities: Findings From a Case Study Investigating Learning on the Individual, Team/Project, and Organizational Levels.”</td>
<td>13 December 2015</td>
</tr>
<tr>
<td>A video presentation was delivered to our partner organization summarizing key research findings and providing recommendations.</td>
<td>13 December 2015</td>
</tr>
<tr>
<td>Our accepted conference paper, “Organizational Elements Bridging Multilevel Learning Dynamics in Temporary Organizational Structures,” was presented at the 76th Annual Meeting of the Academy of Management (AOM) in Anaheim, California, USA.</td>
<td>5–9 August 2016</td>
</tr>
<tr>
<td>Our research project was promoted at the 76th AOM conference at the PMI booth.</td>
<td>5–9 August 2016</td>
</tr>
<tr>
<td>A special banner featuring PMI and this research was displayed at the Queensland University of Technology (QUT) Business Leaders Forum. The research team promoted the research project at the Forum. The QUT Business Leaders’ Forum is recognized as the pre-eminent business leadership event in Brisbane, Australia.</td>
<td>17 June 2016</td>
</tr>
<tr>
<td>Multiple Tweets were sent to promote PMI and our research at the Forum. Some Tweets have been seen by over 300 people.</td>
<td>17 June 2016</td>
</tr>
<tr>
<td>Our accepted conference paper, “Facilitators and Challenges for Learning within a Global Project-Based Organisation,” was presented at the Australian &amp; New Zealand Academy of Management (ANZAM) 2016 conference in Brisbane, Australia.</td>
<td>December 2016</td>
</tr>
<tr>
<td>A final and tailored report, “Balancing Standardisation and Flexibility for Organisational Effectiveness – Research Findings Report,” was given to a participating organization on 5 January 2017.</td>
<td>January 2017</td>
</tr>
<tr>
<td>An infographic designed to promote PMI and our project was shared via social media.</td>
<td>October 2017</td>
</tr>
</tbody>
</table>
References


