



**NORTH STAR**

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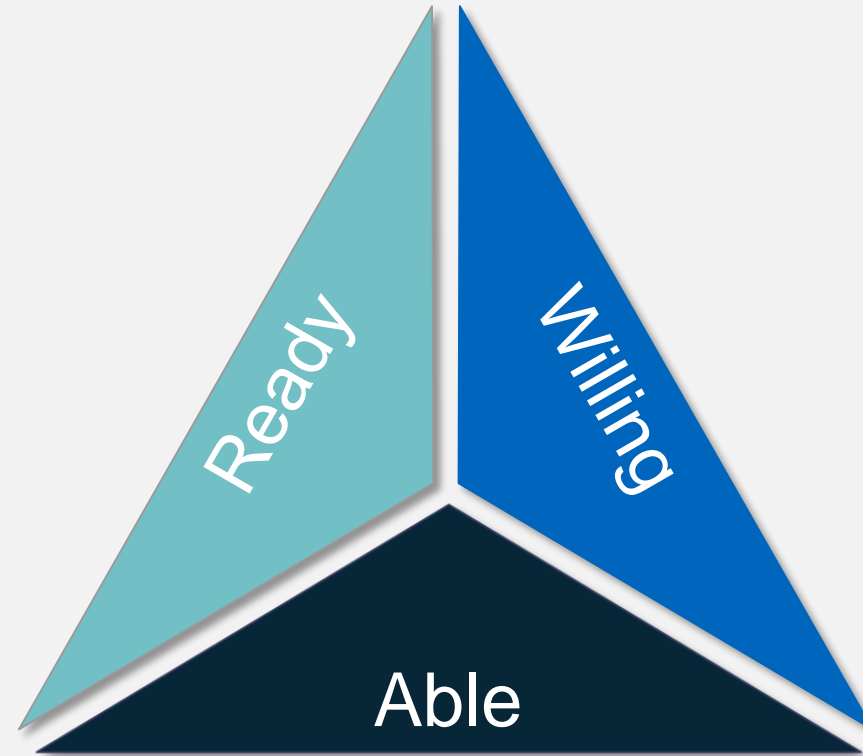


# PMI's Ready, Willing and Able (RWA) Survey – Chapter Leaders' Results

*Global Chapter Development Team*

30 May 2018

Context: Ready, Willing, Able (RWA) survey designed to capture perceptions about preparedness for change



# Similar Sentiments Shared Across Regions



For all surveyed, 1 = Strongly disagree 5 = Strongly agree. Source: PMI RWA, March 2018; BCG analysis.

# Chapter Leader results reveal overall mixed view on preparedness for change, with concerns on perceived lack of volunteer commitment



Ready

**3.98**



Willing

**3.95**



Able

**3.93**



Chapter Leaders are Supportive of change, but doubt broader commitment:

- Demonstrated mixed Readiness, Willingness, and Ability to change
- While generally supportive of transformation, many doubt broader volunteer base's commitment
- Many feel PMI is not engaging them enough

How PMI is Addressing Concerns:

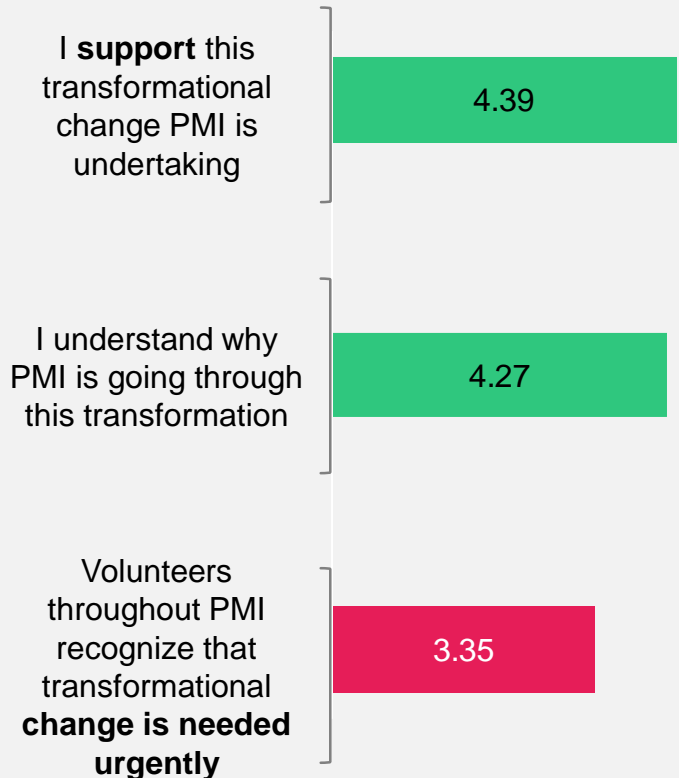
- PMI will commit to and share widely a clear communications timeline and be transparent on opportunities to engage in transformation opportunities for volunteers
- Look for more Transformation updates and call for feedback in Friday Facts

# Chapter Leaders expressed strong individual support of change; and voiced concern about the volunteer base's support and commitment (see scale at bottom of page)



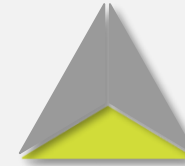
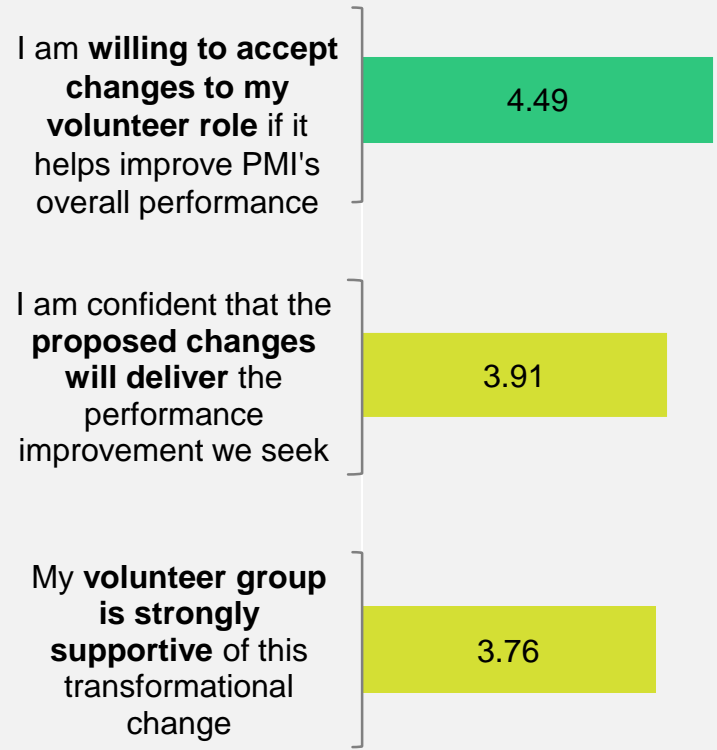
Ready

**Chapter leaders express individual support for change but lack urgency**



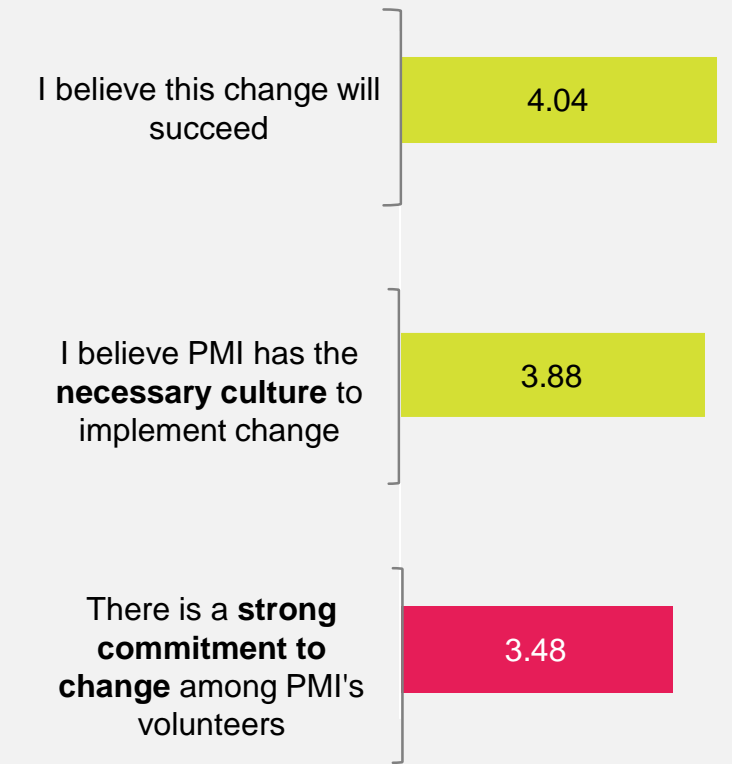
Willing

**Despite strong individual willingness to change, Chapter Leaders doubt peers' support**

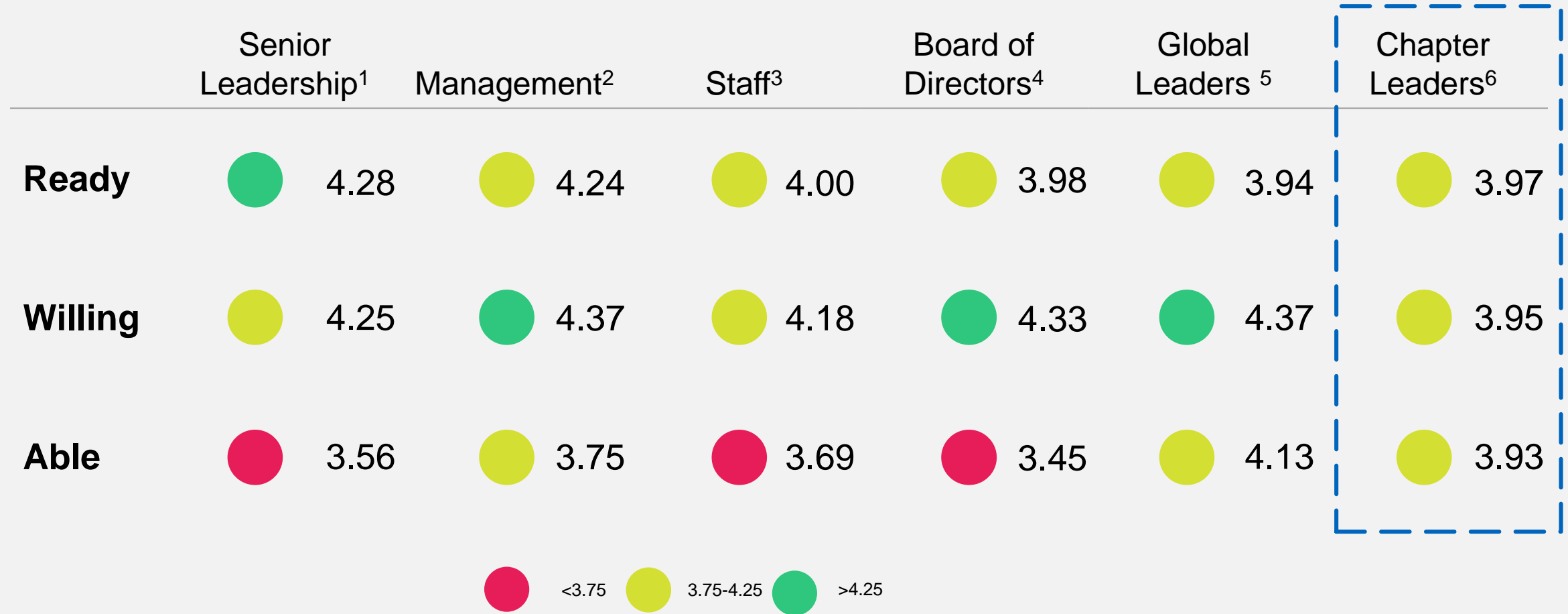


Able

**Chapter Leaders most concerned about commitment of broader volunteer base**



Comparison by stakeholder group reveals Chapter Leaders' are ready, willingness is below average and perception of ability is above average



# RWA Chapter Leaders' Results

Review comments, feedbacks and regional comparisons

Update Chapter leaders on what to expect next

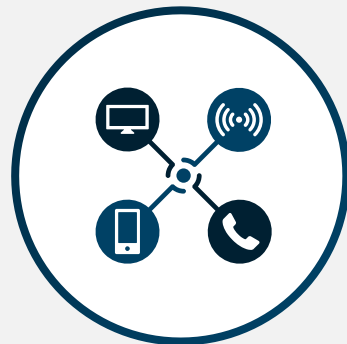
## Three major themes from Chapter Leaders' input



Perception that important **strategic risks** are not being addressed or considered



Belief that PMI is not consistently meeting engagement needs of volunteer base on multiple levels, resulting in low commitment and potential **execution risks**



Request for more specificity in **transformation communications** with tools and messaging for use at chapter level

## Strategic risks: Chapter Leaders raise several risks including brand relevance, appeal to younger PMs, and lack of focus on corporate partners

Theme	What we heard
<p><b>Consistently raised concern that PMI brand and internal culture are still "waterfall"</b></p>	<ul style="list-style-type: none"> <li>• <i>"Perception, perception and perception. I agree that PMI is regarded as heavy, waterfall, old, and overhead."</i></li> <li>• <i>"I deal with this regularly - with Agile practitioners thinking my affiliation with PMI means that I probably lean toward waterfall &amp; complexity"</i></li> <li>• <i>"While the video acknowledged our deeply established brand as the waterfall group, no information was shared on the strategy other than PMI will somehow 'sense earlier.' That is not a vision."</i></li> </ul>
<p><b>Emphasis on need to appeal to younger generation of PMs</b></p>	<ul style="list-style-type: none"> <li>• <i>"Engage Gen Y and millennial audiences- we have a bit of a stodgy, rigid reputation; we need to keep things fresh."</i></li> <li>• <i>"I need to understand better how to obtain the attention of the younger people, how to teach and orient them"</i></li> <li>• <i>"It would be great to see PMI to educate volunteers a bit on diversity and inclusion, and how to appeal to the young generation of PMs."</i></li> </ul>
<p><b>Warning that new strategy's lack of focus on corporate partners presents business risks</b></p>	<ul style="list-style-type: none"> <li>• <i>"We see a lot of members where their company is paying the membership or certification fees. If the focus moves away from the companies, they have to be sure why it is still valuable to invest in the PMI certification"</i></li> <li>• <i>"The Millennial generation are so used to sharing economy and might find paying PMI dues unjustified."</i></li> <li>• <i>"The other challenge will be from companies that don't feel that certification is necessary...find a cheaper way to train"</i></li> </ul>

# Execution risks: Chapter leaders share concerns about lack of engagement of various volunteer stakeholders

Theme	What we heard
<b>High variance in understanding of Transformation</b>	<ul style="list-style-type: none"> <li>• <i>"[The Transformation is] the best kept secret in PMI, from the individual member point of view."</i></li> <li>• <i>"I don't even know what the Transformation is"</i></li> <li>• <i>"We all know change is coming"</i></li> </ul>
<b>Common concerns that broader volunteer-base is not committed to the change</b>	<ul style="list-style-type: none"> <li>• <i>"For PMI to succeed, a strong vision that resonates with this community and a broader community is essential."</i></li> <li>• <i>"Whilst I'm clear, I question just how much other volunteers and chapter leaders really understand what PMI are trying to achieve"</i></li> <li>• <i>"From the video I didn't get a sense of urgency, more of a calm and deliberate sense of change coming."</i></li> </ul>
<b>Raised need to consider Transformation from global lens</b>	<ul style="list-style-type: none"> <li>• <i>Cost of PMI membership prevents involvement in certain regions (Latin America, Africa mentioned in comments): "Emerging economies, such as African countries, offer PMI a great opportunity to increase its membership number and impact but...we currently find it difficult to convince our members to pay PMI dues."</i></li> </ul>
<b>Sense of disconnect between central PMI and needs of Chapters</b>	<ul style="list-style-type: none"> <li>• <i>"PMI appears to compete with its own chapters. Solutions that PMI has are not effectively rolled out through local chapters."</i></li> <li>• <i>"Members do not understand what PMI can do for them, and PMI does not understand what its members might want."</i></li> <li>• <i>"More support at the local chapter levels."</i></li> </ul>

# Transformation communications: Chapter leaders request more frequent, specific communications with helpful tools and materials for the chapter level

Theme	What we heard
<b>Appreciation of video and multimedia efforts to communicate to Chapter Leaders</b>	<ul style="list-style-type: none"> <li>• <i>"Communication of the transformation is structured in a very professional way and is supported with lots of visualization."</i></li> <li>• <i>"The multimedia presentation is a good tool to help people understand what you have in mind -- more so than expecting most folks to devote the time necessary to reading the strategic plan which is a bit dry"</i></li> </ul>
<b>Request to provide Transformation communications at local Chapter level</b>	<ul style="list-style-type: none"> <li>• <i>"Encourage (mandate?) Chapter leaders to convey change messages to the chapter members directly at multiple chapter events."</i></li> <li>• <i>"More direct contact with local chapter boards or even on Regional Presidents' calls rather than recorded presentations, which are not personal"</i></li> <li>• <u>Request for "bite-sized" and other comms tools to enable sharing with membership:</u> <i>"Perhaps a summary of 4 or 5 slides highlighting the major aspects of the transformation"; "Short animation explainer videos"; Templates local leaders can use in their communications"</i></li> </ul>
<b>Raise need for translation of Transformation communications</b>	<ul style="list-style-type: none"> <li>• Many mentioned need for translation into multiple languages; most commonly Spanish and Portuguese</li> </ul>
<b>Request for more details about Transformation progress, how Chapters will be impacted and involved</b>	<ul style="list-style-type: none"> <li>• <i>"Even at this early stage, more specific examples could be provided"</i></li> <li>• <i>"It would be nice to know about specific, tangible plans &amp; deliverables PMI plans to implement as part of its transformation strategy."</i></li> <li>• <i>"What does this change mean specifically to our chapter? "</i></li> </ul>

# RWA Chapter Leaders' Results

Review comments, feedbacks and regional comparisons

Update Chapter leaders on what to expect next

"Excellent initiative to adjust PMI strategic orientation and better stick to market needs. **This will help to better serve our members and keep them with us.**"

"To adapt in a challenging and changing world, we **need to be agile as a organization.**"

"For PMI to succeed, a **strong vision that resonates with this community** and a broader community is essential."

This is an important exercise since it allows...the organization to redefine their role in the **ever-evolving and highly demanding global environment.**"

"I need to understand better **how to obtain the attention of the younger people**, how to teach and orient younger ones."

## What we heard from you

"Renewed focus in newer processes in tune with time where **Time to Market & Collaboration** with stakeholders is of primary essence helps drive the relevance factor of the transformation journey."

"Chapter leader information was tailored to our needs and the change was put into the big picture of what **PMI expects the future of Project management to be like.**"

"From the video **I didn't get a sense of urgency**, more of a calm and deliberate sense of change coming."

"Whilst I'm clear, I **question just how much other volunteers and chapter leaders really understand** what PMI are trying to achieve."

"Communication of the transformation is structured in a very professional way and is supported with lots of visualization."

## PMI Response to Chapter Leaders' RWA

### How PMI has already Responded...

- PMI's Strategic Plan is being translated into Spanish and Portuguese for ease of understanding
- PMI created an Agile guide that was bundled with the Sixth edition of the PMBoK Guide
- Member Segmentation work done has been started and shared with Chapter leaders at 2018 LIMs sharing that the focus is on PM Pros and NextGen segments; Focusing on Jobs To Be Done (JTBD) for each segment and supporting them throughout their career lifecycle
- While the focus of PMI is now on the Individual, Organizations will be viewed as partners and interaction and feedback from them will continue

## PMI Response to Chapter Leaders' RWA

### How PMI is Responding...

PMI will be more transparent and communicative about Transformation efforts to Chapter leaders through:

- Friday Facts- providing updates on the Strategic Plan and Transformation as they come from GHQ
- Presidents' Calls – CD Staff will share how changes impact chapters/volunteers/members
- Region Meetings & LIMs will continue to include up-to-date transformation messaging for leaders to share with chapters; Collect feedback
- Volunteer Resource Center contains documents on transformation and opportunities to participate
- Contact your Chapter Partner or Admin with any questions any time!

**Thank You for your Support of PMI's  
Transformation!**



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