Understanding the Role of "Vision" in Project Success

DALE CHRISTENSON, Executive Director, Leadership and Learning Centre, Public Service Agency, Provincial Government of British Columbia, Canada and DPM (candidate), RMIT University

DEREK H.T. WALKER, Professor of Project Management and Program Director, Doctor of Project Management at RMIT University

ABSTRACT

Rigorous applications of project management methodologies are responsible, though only partially, for project success. We argue, however, that a significant driver of project management success is effective and intelligent leadership communicated through an inspiring vision of what the project is meant to achieve and how it can make a significant positive impact.

An information technology case study project is presented to illustrate how project vision provided and maintained commitment to a complex project that was judged successful when compared to similar projects despite the difficulties described. This success was substantially attributed to the project leadership group's use of a vision.

Keywords: project management leadership; vision; stakeholder management

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Introduction

Leadership forms a significant body of knowledge, but we will only be focusing on a very small but important area of this discipline due to limitations of the scope of this paper. This paper focuses on an examination of the impact of the leadership construct of project vision on expected project outcomes.

There has been considerable attention given to contributing factors to project success and failure. Included in these have been the examination of project manager competence, but little has been written about the concepts and constructs of the role of project leaders in developing and communicating a project vision and the impact of this on project success. One of the most significant contributions that any leader can make to an organization or project is that of creating and clearly communicating a shared vision. Therefore, we argue in this paper that, "project vision" is a significant contributing factor to project success, and, the communication and maintenance of a project vision will impact project outcomes.

Evidence from a case study of a major information technology project is offered to support this argument to reveal the importance of project vision and clarify the impact of this influence upon successful project outcomes. We present evidence that while many of the accepted critical success factors were absent at one time or another in this project, a strong project vision may have been significantly responsible for the ultimate success of the project. We also demonstrate that while many variables are at play in any project, the development, communication and maintenance of a strong project vision may be the key to creating successful project outcomes. Therefore, development, communication and maintenance of the project vision become a primary mission for project managers when considering stakeholder management. As such, the traditional stakeholder analysis must address the stakeholders' influence on the project's vision. We conclude that to completely understand the impact of the project vision and those who influence its evolution, one must also understand the organizational structure, culture and stakeholder power relationships.

The remainder of this paper is structured as follows: First, we discuss the concept of project vision, drawing upon the literature with particular relevance to corporate vision followed by how a vision may be developed. In that section we summarize and present a model for project vision development. We then provide

example from the literature of both failures and successes of vision development and successes linked to our vision model. We follow this with a discussion of a case offered from one of the author's direct experience, and in so doing, draw upon rich contextual firsthand knowledge. While we acknowledge the potential danger of bias that using personal experience, we argue that our opinion-related data has been subject to intense reflection and discussion with other direct project participants to validate opinion and to unearth any in-built biases of interpretation. We then conclude our discussion and draw attention to implications for project management practice.

Vision – Not Just a Series of Fancy Words But a Meaningful Model

What is vision? The dictionary definition of vision is "the ability to think about or plan the future with imagination or wisdom" (Oxford, 2001, p. 2066). Kotter (1995) describes vision in terms of something that helps clarify the direction in which to proceed—this makes sense as the word has implication of the sense of sight. However, Kotter like many other writers on this subject, imbue vision with a transformational quality that enables not only pure change of X into Y but doing so with committed purpose and enthusiasm. As Bennis and Nanus (1987, p. 82) explain, "…vision articulates a view of a realistic, credible, attractive future for the organisation [sic], a condition that is better in some important ways than what now exists." The concept of vision becomes one of a tool or means to engender passion and meaning to a project to meet the envisioned end manifestation.

Taken from the perspective of a tool to make sense out of a plan, Karl Weick provides many examples and illustrations of the power of vision to enable people to make sense out of a plan of action. He discusses how systems of sense-making are vitally important when specialization and decentralization results in segregation of people and teams and differentiation of processes in undertaking an activity. He talks about highly interrelated and dependent sub-systems being tightly coupled (linearly linked, so that a break in one link severely affects other in the chain) and loosely coupled (parallel links with opportunities to switch emphasis and direction of energy while maintaining momentum) (Weick, 2001, p. 384).

Project management is about effecting a change through first segregating tasks into modules undertaken by specialists with skills to undertake those tasks and then integrating these modules into a coherent whole (Morris, 1994; PMI, 1996; Pinto & Trailer, 1998; Cleland, 1999; Dinsmore, 1999; Turner, 1999; Walker & Hampson, 2002). To understand a loosely coupled system in a project management context, we could see a sequence of events unfolding unevenly, sporadically, discontinuously, and unpredictably—this is one view of the challenge of project management. From a tightly coupled perspective, we could see project management excellence as a smooth transition of logically linked activities, each interdependent and each converging to be actioned when and where required. The intelligent use of both tight and loose coupling also conforms to the concept of project management maturity continuums (Kerzner, 2001, pp. 1046-1049) where maturity is described at five levels of attainment. Unfortunately, as the above-cited project management experts attest, frequently subsystem parts are very difficult to coordinate and align, particularly as people and teams have a variety of motivations, aspirations and agenda that might and often does clash with best-for-project objectives.

One of the principal tasks that a project management leader needs to effectively perform is ensuring alignment of goals and resultant commitment to project goals. Because projects are tightly coupled, this situation requires all team members to be able to make sense of project goals so that they can be prepared to support project goals and internalize these as being aligned with their own. Further, because much of the interaction between project teams and subsystems is loosely coupled, there needs to be clear understanding of the cause-and-effect loops that exist so that adverse action by one group can be traced in the minds of that group to the impact the adverse action may have on others connected through the project process and how that might adversely affect them later on. This requires project participants or stakeholders to undertake a sense-making exercise (Weick, 2001, p. 184) and an envisioning exercise focusing on what the end point should be, so that the weaving of seemingly unconnected actions can be clarified to understand how the parts form the whole.

When this occurs, project participants might better see the logic of mutual adjustment and enacting coping mechanisms to provide a loosely coupled system for the required flexibility needed for projects that are highly complex and tightly bound while living in a tightly coupled framework. As Weick argues, *"The real trick in highly reliable systems is somehow to achieve simultaneous centralization and decentralization"* (Weick, 2001, p. 340). This idea of systems reliability being linked to tight-loose coupling also relates to the notion of underlying assumptions being the foundation of culture (discussed later in this paper–see Figure 4). Unspoken assumptions can generate confusion, whereas explicit artifacts such as a vision statement provides the link between assumption and a means to provide both tightly and loosely coupled systems.

The organizational culture literature identifies vision as being an important contributor to the characteristics of a culture. Organizational culture's most visible manifestation (often undecipherable) is artifacts such as stories, history, image, identity and organizational structures. Underpinning these are organizational values, and deeper again are the underlying assumptions (generally invisible) that are shared by the group in that culture. A vision statement may become an artifact, a document describing project goals and aspiration. This will not have meaning unless it reflects the values of the culture concerned.

Values are those behaviors that are cherished by members of the culture or subculture. So that, for example, a project vision may state that people will treat each other with integrity and respect, avoiding blame and litigation. However, if that organization has a history of scapegoating, seeking opportunities for making claims against project supply-chain members and conducting a paper trail to cover themselves at every opportunity, then a conflict arises between the vision statement artifact and the culture's value system. Clearly, there is a palpable link between values and artifacts.

Similarly, values are palpably linked to assumptions. The above-illustrated example of defensive behaviors, such as creating a paper trail, being unhelpfully bureaucratic or identifying scapegoats, may be derived from a strong foundation in assumptions that other supply-chain partners will take advantage of an organization. The need to expose and unearth such assumptions so that they can be understood and dealt with is a fundamental feature of partnering and alliancing — an increasingly popular approach to managing complex projects (Bennett & Jayes, 1995; CII, 1996; Lenard, Bowen-James, Thompson & Anderson,. 1996; Doz & Hamel, 1998; Lendrum, 1998; Walker & Hampson, 2002).

Creating an effective project vision requires excellent communication skills and a deep understanding of both organizational culture and the history and trigger mechanisms that create underlying assumptions of individuals and groups comprising project teams. A project vision can be an artifact that defines the project's soul so that it anchors project participants through their core values to a project outcome that all can relate to. Clearly, this is a difficult task requiring intelligence and wisdom on the part of project leaders. Crafting a vision requires insights into the underlying assumptions that determine values and calls for creating artifacts that can be accepted and internalized.

The role of the vision artifact is well recognized as a focus for managing projects. Leading project management commentators have observed, "The most significant success factor for project teams is that they have a common and shared idea of what difference they are trying to make as a result of the project. Such a vision can be built up by exploring questions with stakeholders and project team members, such as:

- How will this project make a difference to the organisation [sic]?
- How would we know that this project has been highly successful?
- What in our wildest dreams would you like this project to achieve?" (Briner, Hastings, & Geddes et al. 1996, p. 89).

It is important to discuss the basis of change management because projects are about instigating a process or product change (Cleland, 1999). The interesting link between change and vision is that the vision statement clearly seeks to convince its audience that the change is worthwhile and indeed bestows benefits — it also indicates what will be different or describes a different end state (change). Change also invokes anxiety because it challenges the status quo and requires expenditure of transformational energy.

Two different types of anxiety have been identified as affecting people's readiness for change (Schein, 1993). In this paper's context of discussing project vision, we can also look at project vision as fulfilling a changed approach to participating in the project. This change is usually moving from a business-as-usual expectation to striving for excellence by aspiration to make a palpable and positive impact. A project vision concept, encapsulated in a vision statement, often seeks to motivate and inspire team members and other stakeholders to positively participate and shed negative behaviors (such as naked self-interest) in favor of the common good, resulting in widespread benefit.

Anxiety Type 1 is the feeling associated with an inability or unwillingness to learn something new because it appears too difficult or confronting (Schein, 1993, p. 86). In this situation we deny the problem exists, search to blame others for the symptoms requiring the change, or simplify the perceived problem triggering change in terms that when seen in retrospect, appear ridiculous. The phrase *"who would have foresaw this … or who could have anticipated that…"* are often used, yet in such cases the problem and change action is often quite clear to those not clouded by Anxiety Type 1. Unfortunately, Anxiety Type 1 behaviors are universal and all too evident with a management response to mount more pressure to conform to the expected response. This can exacerbate the situation as it drives people towards panic, and when people are under severe stress (panic) they revert to earlier patterns of learning even when these patterns are no longer effective or appropriate (Weick, 2001). This leaves people in a bind. They need to change and update their knowledge, but this is a painful and energy absorbing process.

Anxiety Type 2, the fear, shame, or guilt associated with not learning anything new, particularly when survival is challenged without action being taken, (Schein, 1993, p. 88) is the type of anxiety that change activists and leaders need to cultivate. Moreover, they need to ensure that Anxiety Type 2 pressure is greater than Anxiety Type 1. This is uncomfortable to many organizations because it requires expensive and extensive support and resourcing to provide the escape route from this form of anxiety. It is easy to see why many organizations would opt for a strategy of putting pressure on individuals or business units (BUs) and then leaving them to sort out the dilemma "on the cheap" by not providing adequate support systems. It is instructive that this strategy seems to almost always cost more through failed plans, dreams and commitments inhibiting delivery of the expected results. The result is frequently blame and negativity. If Anxiety Type 2 is responded to through a project vision, then we may see that project leaders can make a positive difference through providing enabling support systems. Creating Anxiety Type 2 grabs attention and is consistent with what knowledge management gurus (Nonaka & Takeuchi

1995) refer to as providing a shock impetus to trigger improvement. Anxiety Type 2 provides a trigger to search for a way out of the Anxiety Type 1 dilemma. Anxiety Type 2 impacts must be greater than Anxiety Type 1 so that the project leader needs to prepare a general solution outline (the project vision statement) that enables people to find their own way to channel their energies and commitment to move from a position of defensiveness to one of confidently addressing the change deployment that constitutes the project in question.

The characteristics of a company vision make a useful model. A well-constructed vision comprises two elements, the core ideology and envisaged future (Collins & Porras, 1996). The core ideology comprises core values and core purpose. Core organizational culture values have been discussed earlier in this paper. Sometimes this is explained in terms of the "X way." The envisioned future is what has been termed a big, hairy, audacious goal (BHAG). It is usually described vividly and, as argued by (Collins & Porras, 1996), BHAGs are needed as stretch goals to provide a framework for progressing towards the envisioned future. Core purpose is often defined in terms of a mission statement. They also observe that the basic dynamic of visionary companies is to preserve the core culture and purpose and to stimulate progress towards the envisioned future. Stretch goals should not encourage people to work harder but work smarter often through more effectively sharing and leveraging knowledge (Nonaka & Takeuchi, 1995; Davenport & Prusak, 2000).

Both a project vision and an organizational vision share many common characteristics. However, a project vision is more complex because projects use multiple temporary organizations, each with their own cultures and subcultures. This notwithstanding, we argue that a project vision should have the following characteristics:

1. It must be understood: It must capture the core purpose, preferred future state and essence of the project objectives, its raison d'être
2. It must be motivational: It must make a convincing case for following the project vision concept that can be internalized by project stakeholders and that provides a compelling value proposition
3. It must be credible: It must be consistent with stakeholder cultures or sub-cultures to appeal at the assumptions and values level so that the vision statement artifact resonates with them;
4. It must be demanding and challenging: It should be proactive to facilitate teams to work smarter and more effectively, perhaps identifying stretch goals.

Note that vision and mission statements may get confused and understood as synonymous by some academics in this area of study. Mission may be thought of more both in terms of goals and objectives in an action sense, whereas vision may be thought of as a state of being or end state.

Vision and Transformational Leadership

The business literature contains countless examples of the nature of leadership, and there appears to be a broad consensus that leadership and management are both different in tasks undertaken and have different aims. Whereas managing is about the planning for the deployment of resources to achieve an objective, leading is about using "power to influence the thoughts and actions of others" (Zaleznik, 1998, p. 63). Management is also seen to be about coping with complexity and bring relative order out of chaos, whereas leading challenges the status quo and copes with change by setting a direction and aligning people's motivation and abilities through effective communication of the chosen direction (Kotter, 1998, p. 41). Thus, leaders use vision-making and vision-communicating as their tools to achieve strategic goals.

The link between leaders and followers is an interesting one that has also attracted much attention. Most notably, the contingency approach to leadership maintains that the style of leadership is principally determined by the maturity of followers. Briefly, maturity relates to the degree of commitment and the degree of capability of followers to do what is required of them (Hersey, Blanchard & Johnson, 1996, p. 208). Four leadership styles were developed around this concept:

- Style 1 involves using direct forms of power to coerce followers into following instructions in situations where either commitment is largely absent and ability is limited so specific instructions must be given under close supervision
- Style 2 involves explaining the goals and providing opportunities for clarification and building solutions to identified problems
- Style 3 involves sharing and canvassing ideas and cooperatively making decisions with the leaders as facilitators
- Style 4 involves identifying the goals and then turning over responsibility for finding ways to achieve these goals by the teams involved.

Styles 3 and 4 do represent a more empowered manner for leaders to influence followers, however each of these styles implies a somewhat transactional leadership style—the leader provides resources and rewards for followers to accomplish the required tasks.

Transformational leadership is defined in terms of the four I's, (Bass & Avolio, 1994, p. 2; Avolio, 1996 p. 5) that is, as "when leaders:

- Stimulate interest among colleagues and followers to view their work from new perspectives (Individual consideration)
- Generate awareness of the mission or vision of the team and organization (Intellectual stimulation)
- Develop colleagues and followers to higher levels of ability and potential and; (Idealised [sic] influence)
- Motivate colleagues and followers to look beyond their own interest toward those that will benefit the group (Inspirational motivation)."

The preceding four I's also match our four vision characteristics stated earlier. The leadership literature acknowledges advantages inherent in adopting a transformational approach as it appeals to more powerful intrinsic motivational energy that transcends self-interest, and thus is better placed to be an effective vehicle for delivering outcomes for multiple stakeholders (Bass & Avolio, 1994; Avolio, 1996; Bennis & Nanus, 1997). In at least one study involving data gathered from over 2,000 managers and employees at a major Australian bank, researchers found strong evidence associating group cohesion with transformational leadership (Carless, Mann & Wearing, l1996). This indicates that this concept can be translated effectively to developing an effective and appealing vision for managing projects, because projects require a strong cohesive team focus on the desired project outcomes.

However, what is particularly relevant to project organizations where multiple stakeholders have varying specific ideals of their desired project outcome is that a transformational leadership is insufficient by itself. Visions need to be communicated clearly and simply, often in terms of a metaphor with a powerful visual image or sensual symbol of achievement that resonates with those stakeholders required to commit to delivering these outcomes (Bennis and Nanus, 1997, p. 100). One vital skill of project management leaders is to facilitate the development of a powerful project vision as well as to develop a communications strategy that effectively explains and engenders commitment, rather than just compliance to the vision's delivery.

This may be accomplished through a charismatic approach where the leader becomes teacher, mentor, coach reformer or revolutionary, but not all projects can expect to attract such an individual to contribute these powerful gifts. Transformational leadership, however, is about leaders "structuring and articulating problems for followers, enabling the followers to more easily comprehend problems so that they can more effectively deal with them" (Bass, 1985, p. 31). This seems to address the Type 2 Anxiety discussed by Schein (1993). Either a charismatic individual or a coherently focused stakeholder reference group can achieve this. We argue that a well-chosen stakeholder reference group might be better positioned than a charismatic leader to develop the vision because of the wider experience, diversity of knowledge and perspective and fuller appreciation of stakeholder constituencies that a truly representative and intelligent reference group can offer. Thus while transformational leadership can be linked to charisma, it is not necessarily dependent upon it.

Developing and Crafting a Project Vision

The development of a project vision is complex and occurs in a number of ways. One way is illustrated in Figure 1.

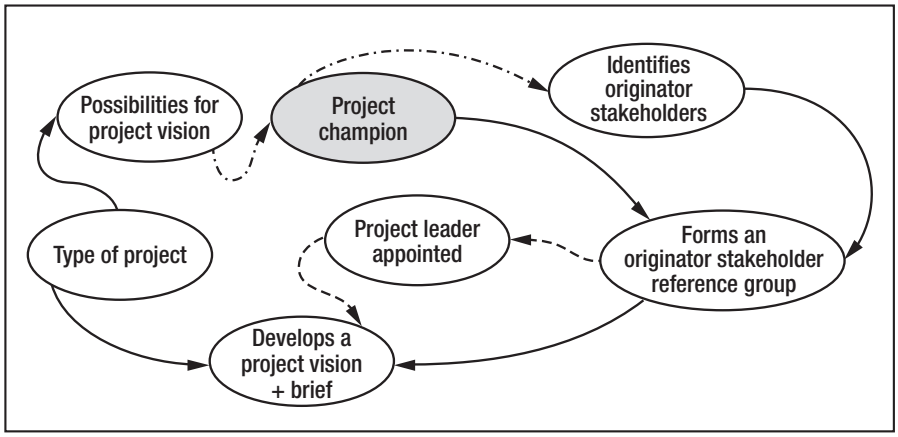

Figure 1. One situation for developing a project vision

The type of project influences the way that a project vision may develop. Project goals and delivery methods may be well defined and this matrix has been used to define project types (Turner and Cochrane 1993). The simplest situation is where the goals are relatively clear and the delivery methods well understood. The most complex and complicated projects are characterized by ill-defined goals as well as uncertainty surrounding delivery methods. Whatever the situation regarding goal definition is has an impact on the possibilities for developing a project vision. If the goals are relatively ill-defined, any potential project champion (i.e., that individuals or small groups who proactively seek to establish a case for the project development) will need to identify and assemble a stakeholder reference group to help define goals. This group will then source and choose a project leader and this reference group; the project champion and project leader will then define goals and develop the project vision.

In the less-complex situation illustrated in Figure 2, a project champion has a sound understanding and grasp of the project goals and can source and appoint a project leader. The leader can then identify relevant stakeholders with a view to form a reference group to work with the project leader to develop a vision. Whichever approach is adopted, the vision can be developed with the insights of relevant stakeholder representatives. This process facilitates not only group input and diversity of insights for building a credible solution, but also development of stakeholder and team understanding. This is the process of culture creation—of developing the assumptions that underpin values, which results in identifying the artifacts of culture (Schein, 1985). If this process is effectively undertaken, then it can facilitate a clear understanding of stakeholder goals and their aspirations for the project; it can inspired motivation and build credibility to provide the impetus for designing challenges that spur innovation.

Vision development appears to be developed through a set stage of events

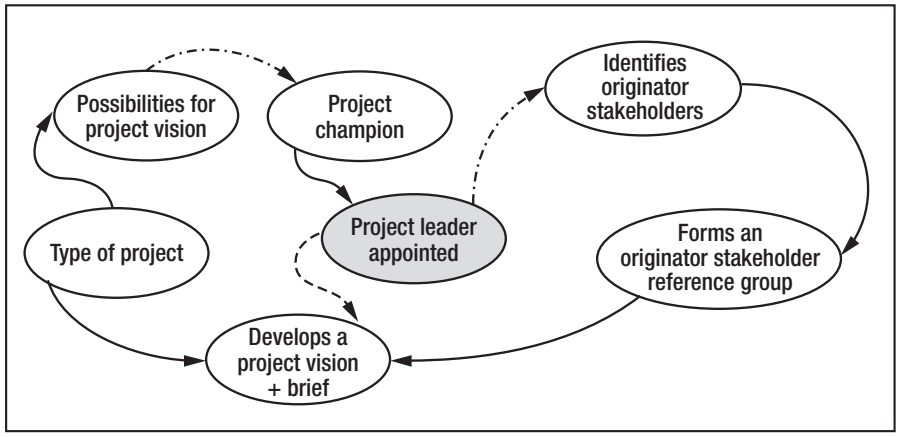

Figure 2. Less complex situation for developing a project vision

that occur in varying levels of intensity. The process begins either formally or informally with a stakeholder vision beginning to emerge so that some preferred future becomes evident, generally through a clouded or foggy process of struggling to understand fundamental issues affecting the project. If stakeholders are gathered together as indicated in Figures 1 or 2, then stakeholder representatives can either claim a voice (if there is a need to be assertive), or the project management representative can actively encourage and nurture this voice to be heard (if the stakeholder group is reticent or passive). Either way, project vision priorities can be established.

A process of negotiation can take place whereby these can be evaluated in terms of impact upon stakeholder groups and priority weightings can be established. It is important to understand that negotiations should be undertaken on a win-win basis because once the implications of various priorities are explored and understood, often unintended consequences can be avoided. A project manager who has the skills to both unearth conflicting priority impacts and facilitate improved prioritization of objectives can avoid many potential intra-stakeholder disputes. The vision can then be developed (step 5 in Figure 3) using a transformational leadership style that addresses the four I's and the suggested four characteristics of a good project vision. This may be best to be undertaken through stakeholder reference groups to ensure that the vision is as clearly understood in terms of impacts and influences as possible.

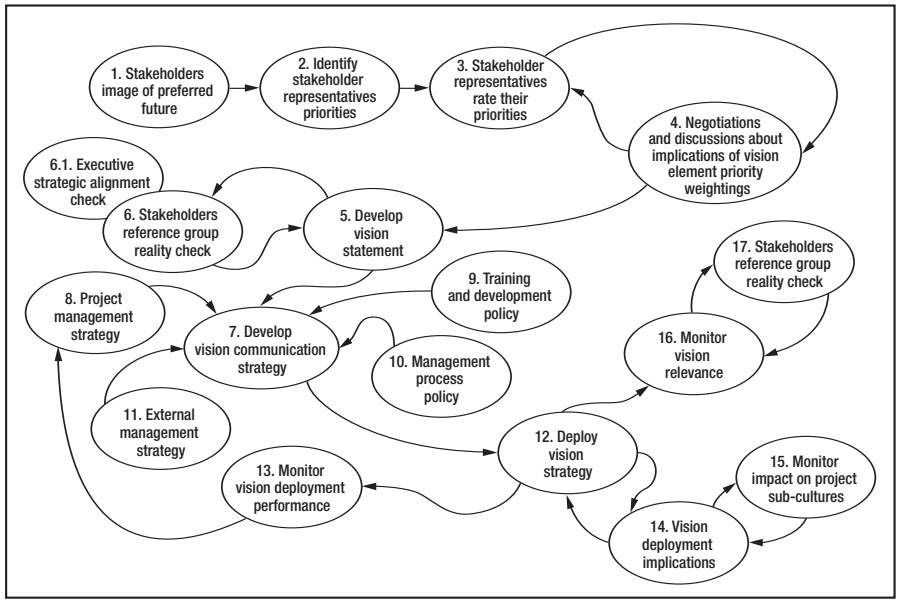

Figure 3. Model of vision development process

It is at this point that a vision reality check can take place to ensure that the vision is valid to stakeholders. This is generally undertaken to varying levels of success. In some cases, the project management group assumes much and stakeholders may not be consulted. In other cases, feuding stakeholder groups may generate a paralysis. In between lies the "reasonable" path. The outcome of step 5 is the development of the project vision as articulated (or often inferred). This has inputs from management policy and external management strategy, for example from legal or regulatory agencies. Once the Vision is communicated as indicated in step 12, then monitoring can take place. This can consist of checking how effective the vision communication strategy has been (step 13); the implications of the vision through monitoring project sub-culture reactions (steps 14 and 15); and revisiting the periodically the relevance of the vision. It would be detrimental to the project to overlook steps 16 and 17, as both priorities and relevance change often during long or complex projects.

The model of project vision generation illustrated in Figures 1 and 2 and the development of a vision statement as illustrated in Figure 3 occurs in varying degrees from virtually never to very substantially. We argue that the degree to which Figure 3 model is followed, that is, the level of genuinely empowered and positive interaction between project stakeholders and the project management team, has a direct impact upon the quality of a project vision. This quality determines perceptions of how well the vision is understood by stakeholders, how the vision appeals to motivational instincts, how credible the vision appears, and how challenging the vision can be without appearing too demanding to be seen as achievable.

Intelligent project vision statements can be evaluated in this light for their effectiveness of being likely to achieve the vision objectives. We argue that the key to developing an effective

project vision is to make objectives and purpose clearly understood, to inspire motivation, and to ensure that the project vision is credible and challenging. All this is accomplished through organizational and ethnic cultural frameworks and mental models that enable people to relate to each other, understand each other's worldviews and share assumptions that create shared values that make sense of cultural artifacts such as stories, a project vision and other forms of group "branding."

Figure 4 illustrates our model of vision effectiveness. Understanding, motivation, credibility and challenge can move the emotional attachment that people feel. This can range from a vision statement being seen as a superficial document or as a cultural artifact through the vision providing a resonating truth that taps into the very core depths of a culture or sub-culture. Each and every project has a genesis in a real need. This need must be articulated to ensure that it receives its due and just attention and resource allocation.

We argue that much of the skill of project management leadership is about ensuring that the project need is adequately articulated into a project vision statement that facilitates enthusiasm and commitment for its successful realization. In this way, a deep understanding of the value of the project, its motivational potential for those involved, and its credibility as a worthwhile endeavor that aspires to achieve a best-in-class outcome can be encompassed through the artifact of the vision.

Case Examples from the Literature of Successful and Failed Vision

There are innumerable cases that could be discussed here but we have chosen to seek out only a few salient ones from the literature that appear to typify examples of the good and the bad. We have chosen one case where all four of the above conditions seem to have been globally met, and one case where they all appear to be met within Japan, but due to difficulties in the Japanese historical and ethnic cultural context being transferable, was less successful than the first case. The third case was an unmitigated disaster and lack of a credible and reliable vision was cited as a substantially cause.

One interesting example reported by Nigel Holden tells how a company vision for global knowledge-sharing and use of a common approach to operating procedures led to an innovative process of creating the concept of a corporate facilitator. These facilitators were tasked with ensuring that the corporate culture of a Danish-based global pharmaceutical and health product enterprise. the "Novo Nordisk Way of Management," was spread across its global operations (Holden, 2002, p. 110). The "Vision 21 purpose" is cited as "Our business is to discover and market products which satisfy real needs—improving the way people live and work. We find better ways to fight the burdens of disease and to provide sustainable biological solutions to industrial problems." The company's way includes directions on how they approach implementation of procedures for accountability, being ambitious for excellence, openness and honesty, customer focus, readiness for change, and social responsibility (Holden, 2002, p. 107).

In this case, Vision 21 was implemented through the widespread adoption of the Novo Nordisk Way of Management using 14 specially selected senior level personnel called facilitators. These facilitators visited each business unit (BU) throughout the global organization to help the BUs adopt standard approaches in a way that shared knowledge about best practices developed within other BUs, and to improve communication and transfer of values across the organization. Thus, Novo Nordisk "walked-the-talk" by developing its vision and acting upon it with credible, strong leadership models that were credible, and through its delivery model of facilitation and motivated BU commitment and support. It should be noted that this organization experimented with the facilitator concept to activate its vision in late 1996 and that as of 1999, the concept was judged a success and it was continued and improved (Holden, 2002, p. 129). Key aspects relating to its vision were that the change program could be viewed as an initial three-year project that was successfully completed. It was clearly understood, inspired motivation, was credible and challenging.

Another case study cited by Holden (2002) relates to Konosuke Matsushita (KM, as he became known), the founder of the Japanese global company Matsushita, as having elaborated his organization's raison d'être in "the basic management objec-

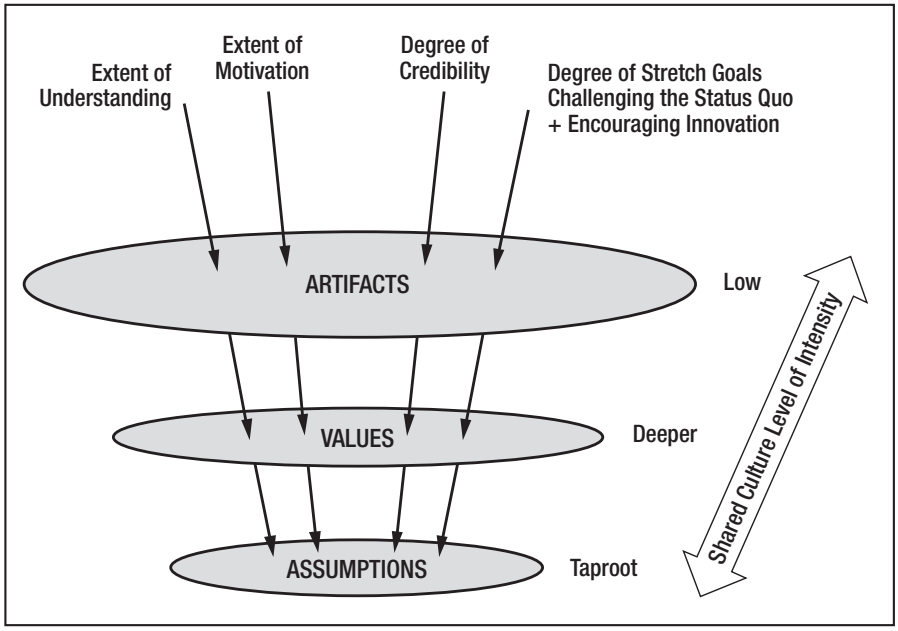

Figure 4. Project vision effectiveness

tive" and "the company creed." These are quoted respectively as "Recognizing our responsibility as industrialists, we will devote ourselves to the progress and development of society and the well-being of people through our business activities, thereby enhancing the quality of life throughout the world," and "Progress and development can be realized only through the combined efforts and cooperation of each employee of our company. United in spirit, we pledge to perform our corporate duties with dedication, diligence and integrity" (Holden, 2002, p. 141). This indicates the types of messages and organizational culture artifacts that have been developed to facilitate linking vision with action.

An interesting aspect relating to developing a vision is that KM developed Matsushita's value system based upon his own philosophy and experiences of the Japan of the 1920s and 1930s. This creed was based upon a humanist tradition and in fact predated constructs of social responsibility and triple bottom line (social, economic, and environment) by over 50 years. His vision that he persuaded his entire company to adopt was based upon service to the public, fairness and honesty, teamwork for the common cause, uniting effort for improvement and courtesy and humility (Holden, 2002, p. 143). He championed and nurtured that vision to the extent that it became a corporate scripture. It was clearly understood by the Japanese employees (assisted by their instinctive and tacit knowledge of Japanese history and culture), inspired motivation, and was credible and challenging. Holden (2002) makes a cautionary note that is highly relevant to this paper, namely, that the Matsushita vision was poorly understood by its non-Japanese employees, because many of the embedded cultural values and assumptions were purely Japanese (and moreover related to the specific historical context of Japan's history of 1920s to post-war and through to the modern day). This reinforces the embeddedness of history in developing cultural values that support artifacts such as a corporate vision.

We have provided two successful examples of a vision deployment (accepting the caveat of Matsushita's mixed success with transferring ethical values from a core ethnic culture to local affiliates in non-Japanese Bus). We will now provide a well-cited example of a spectacular failure of an IT project to illustrate how a lack of vision significantly contributed strongly to it failure (Drummond, 1998). The following contains a summary of aspects of this case:

The Taurus project was proposed for the UK Stock Exchange to provide an online processing of share trading and other ancillary activities. The £500 million project would later be abandoned in 1993. It was a highly complex project that was demanded urgently with the securities industry requiring an 18-month time frame for design, development, and deployment. A standard software package that was decided upon as the basis for the system was modified significantly, but the degree of modification and the clarity of what were to be the final features were unclear, ill-defined, and subject to much uncertainty. This added to the confusion surrounding what the system was meant to look like.

Further, the confusion and unrealistic demand on delivery time grew as those responsible for delivery slipped into being unmotivated and skeptical about the prospect of any measure of success. Each month that went by, the project seemed to be no further advanced because the needs and demands for change increased and much of the work produced became useless due to these change requests. Also, the market changed from "bull" to "bear." This highlights the importance of a vision being subject to "reality checks" as described in Figure 3 (steps 6 and 17). The delivery team was certainly challenged, but not by stretch targets designed to initiate innovation, but by continual demands to work harder to catch up with lost progress. When a system is failing to work due to a malfunctioning system dynamic, then continued, increasing resource inputs or making the system more tightly coupled, it merely accelerates the manifestation of the presenting problems (Weick, 2001, p. 235).

Thus the project as described by Drummond (1998) based upon her significant sources of data and reports indicate that the project vision: was poorly understood, inspired lack of motivation, was not credible, and was challenging in a negative and not positive way. The result of project failure could be expected from the four dimensions of vision development suggested by our analysis. If all project team members and stakeholders had a clear vision of the purpose of the project, Taurus's spectacular failure could have been avoided.

This case strongly indicates that the role of project leadership is pivotal. However, while the project management literature appears to be dominated by the importance of techniques used to manage projects, there is a noticeable gap in the literature relating to the impact of project leadership and the development of a project vision that unites project teams and supply chain partners as a critical success factor for projects.

The Case Study

Joint Information Management System (JIMS) was started in the early 1990's to address the business need for a central repository of information for a government agency involving four interrelated elements of a government service delivery system in which data would be gathered about clients that could be shared (subject to strict privacy and confidentiality arrangements) to enhance effectiveness of information management—to benefit both client and state interests. An informal project was initiated to deal with the issue of why individual key stakeholders did not have an effective or uniform means to share information.

The project is typical of the need for many service organizations with many interlinked but separately operating entities to share vital authorized information. A goal is to avoid duplication, information entry and maintenance errors, and wasted management energy in establishing duplicated

information systems. The original vision was to develop a simple centralized case tracking database system. However, as is often the case in developing such systems, as additional requirements were identified, the grander idea of a System for Case Integrated Processing (SCIP) was spawned, and an official project was sanctioned.

Although the vision has remained fairly constant over the 10-year life of the project thus far, the project management structure matured from a loose group of individuals with a good idea (referring to SCIP) to a formal project management structure with a widely understood vision (referring to JIMS). This is typical of what has been described as working within the "whitespace" in unofficial projects that test the waters, with good ideas being developed in an incubator before being adopted as officially sanctioned project "blackspace"—fully funded, resourced and subject to the relevant corporate management systems (Maletz & Nohira, 2001).

With this movement towards greater structure came greater rigidity of decision-making, less creativity in problem solving, and ultimately an advocacy positioning of stakeholders. The movement to the "blackspace" was required to develop the business requirements and business case(s) so the project could move forward to an official funding stage of development. The creation of the vision was a joint effort and there was a reasonable expectation that it was also a shared vision. However, it quickly became apparent that the mission, the ultimate means to achieve this vision, was mired in the dilemma of key stakeholders all desiring separate business requirement sessions.

The formal project management structure was composed of a steering committee and various subcommittees (business change council, change request, configuration, and training). The chairperson of JIMS Steering Committee, a senior Executive from one of the core agencies, acted as the executive sponsor. A full-time project manager was assigned from within the ranks of the Information Technology Division, a central agency providing technology support to all government branches. Key stakeholders had representation on all committees and subcommittees. Project mangers were selected for each core agency and designated as representative key stakeholders. People selected to be project managers, however, had no formal training to meet their new responsibility and title. Their authority was uncertain within their respective agencies and dubious within the context of the project management structure. It appeared that the executive members of the individual agencies still retained conduct of decision-making and resource allocation and left only routine management functions to the project managers. Figure 5 illustrates the project leadership structure.

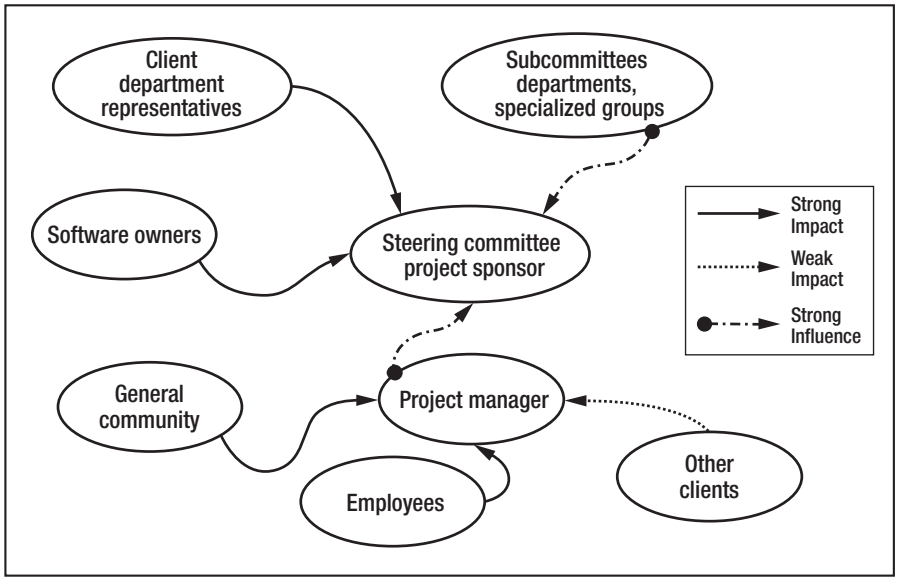

Figure 5. JIMS stakeholder influence and impact map

In essence, assigned project managers had none of the conditions, including an organizational career structure to reward project managers, that Sauer, Liu and Johnston et al (2001, p. 45) indicate is necessary to increase the probability of project success. The lessons to be learned here is to separate the actual leadership structure from the individual skills and capabilities of the managers in those positions as important success factors. The presence or absence of one or the other will negate the positive impact of the other: For instance, the right structure cannot work with the wrong leaders, and the right leaders cannot make a flawed leadership structure work. Therefore, a successful project must have both an appropriate leadership structure and the individual leaders must have the leadership skills and abilities, and personal motivation, to make it work.

Interestingly, the intent of JIMS was not to have unskilled managers in these roles. The assumption was that they could benefit from "on-the-job" training and be successful by learning as they went. However, the intangible cost of this steep learning curve and professional stress resulting from on-the-job project management training is, in our view only recoverable in organizations where project management recruits are cycled from one project to the next regularly, and where a peer support network is in place to assist with this important mentoring process. Also as a consequence, in organizations where no recurring project management assignments are possible, this investment in training would be lost nevertheless.

The age-old problem of a functional versus a matrix organization also becomes apparent if full-time resources assigned to a project remain

under the supervision of their own organizations rather than reporting to the overall project manager. In some parts of the organizations this changed, but for the most part this dynamic remained throughout JIMS. Assigned project managers therefore only began to have greater moral authority and control over the projects as their experience grew and the host agencies came to accept the expertise of dedicated project managers and the application of project management principles when they experienced the benefits of managing JIMS this way. The credibility of the vision began to unravel as the stakeholders began to question the value of the integrated information management solution, while the ability of a project manager with sufficient authority and influence to maintain the original vision waned and declined due in part to the perceived relevance of the project manager position and role.

Although a formal project management structure was adopted for JIMS, the project seems to have required a more flexible approach to accommodate both the desire of individual stakeholders to have personal influence while mitigating the unforeseen risks that this structure actually allows. As Maletz and Nohira (2001) explain, to mitigate this often requires a creative approach that necessitates moving outside the formal structure but remaining within the boundaries of the original vision. Once again, this reinforces the need for a central vision that is compelling and which everyone will support, regardless of the political and organizational issues that arise. Achieving this in practice was not easy when the entire premise of the JIMS system was to link a series of separate and normally serial government processes. For each part of the process, a key stakeholder or core agency needed to input data that was then accepted by another key stakeholder or agency to use or add value to the information input flow continuing through the service-provision business model.

Although the vision was apparently understood, business requirements were identified, project charters signed, design specifications approved and proof of concept modules displayed, front end core agencies participating in the system still had the option to walk away from the project if they didn't like it. It soon became apparent to everyone that the project had only cursory buy-in from one key stakeholder with no firm commitment to the vision. Unfortunately due to the project's leadership structure, there was no mechanism to preserve their continued participation. Where they remained conceptually committed to the vision, they still walked away from the mission of creating a one-write system (to enter data once then share it across the wider system) in preference to their own system.

In retrospect, this stakeholder may not have understood its own needs or, at a minimum, did not appreciate the priority of its operational need for a record management system rather than a case tracking system. The difference between the two systems is not necessarily that significant, but this stakeholder realized that it is investing in a system that would address only 20 percent of its workload, whereas 80 percent of its workload is never forwarded to one of the other prime stakeholder agencies. This reduced the credibility of the vision for that particular stakeholder because it failed to motivate or inspire it to be part of an information system in which it may be generating front-end effort for data and information entry and yet gaining no tangible benefits or rewards. This attitude is typical in many processes where information that one party can easily gain is not "paid for," so that it makes little sense to that group (based on a transactional approach) to expend scarce resources to gather data or information that others along the supply chain may benefit from. In this sense, the remedy may be argued to lie in the system rewards and resourcing design, and not through demonizing or criticizing a particular stakeholder for being "silo-minded" or selfish.

Attempts to influence continued participation were unsuccessful, as no structure of dispute resolution was in place or contemplated in the leadership terms of reference. Although most agencies indicated they were committed to the project, an inspection of project documents finds little proof of action on this commitment. An essential element of the foundation necessary to support project success was missing.

Apart from the overall vision issue, there is always the seemingly intractable problem of stakeholder behavior being more reflective of their individual agency or department interests, rather than the good of the overall project. Endemic leadership behavior to accommodate these requests, rather than to challenge them effectively, meant there were often questionable corporate benefits for some aspects of the overall project. Fortuitously, while the vision had gaps, there was considerable documentation of end benefits to support continued project funding. Unfortunately, the dubious link between these end benefits (stated primarily to achieve funding) were not entwined with the vision, creating endless tension around internal project decision-making.

At the time, project leadership was clearly being driven by the central support agency based on technological requirements to eliminate a number of different legacy systems. These systems had become undesirable as they were costly to maintain, built with different software applications, unreliable, and did not interface with each other—yet, executive sponsorship was not forthcoming from all of these core agencies. Again and most notably, one core stakeholder was fractured in its support. Lack of executive sponsorship as identified by Ulfelder (2001, p. 3) is the number-one way information technology projects fail; further, "The problem is that too many business executives view IT project, . . . as mere (albeit expensive) technology challenges." It is very conceivable that JIMS was seen as just such an unwelcome and threatening challenge, rather than a welcome process improvement opportunity. Thus, working smarter with stretch goals to improve the overall system was not evident.

The philosophies of independence exacerbated the divisive nature of key stakeholders' internal agendas. The project yearned for a transformational leader (champion) that could transform self-interest into a corporate mission. However, as the literature suggests and Bass (1985, pp. 37 and 154) identifies, transformational leaders often appear in a time of crisis. At one point, the project was at risk of stalling due to the lack of expected funds in the next fiscal year. This was compounded by the withdrawal of sponsorship by one key and largely uncommitted stakeholder, but transformational leaders did appear in the remaining core agencies. Self-interest was put aside for an aggressive rollout schedule. Sacrifices, cooperation and creativity were the call of the day. A renewed focus on the project vision inspired all people in the core agencies to get JIMS implemented to the extent possible, given the remaining timeframe. Thus, at this point of inflection, both motivational and inspirational vision characteristics were revived, and the vision became credible again.

The idea of developing an integrated case tracking system was as much a high-risk endeavor as it was innovative and untried, and it involved a large number of stakeholders (and, hence, presented some intriguing stretch goals). The joint vision was seemingly adopted in the very early stages, quite likely before individual stakeholders fully understood their business needs and before technological solutions had conceptual specificity. The importance of the shared vision cannot be underestimated in its importance to promote project success and bind stakeholders to a firm foundation.

A vision is inextricably linked to the end benefits and should be clearly understood at the outset of the project, but with the foreknowledge that both the vision and end benefits are likely to change and evolve throughout the project life cycle. The stakeholder group highlighted in this case as being problematic never took exception with the vision of JIMS, it just no longer met their specific needs. Perhaps the vision or mission could have evolved to retain their participation. It is possible that another approach may have been available but was not employed. Remenyi and Sherwood-Smith (1998) have proposed an "Active Benefits Realization" approach that is based on a contingency philosophy, under which an evolutionary approach is used to remain focused on the delivery of end benefits. Stakeholders play a central co-evolutionary and participative role through the development of the system. All stakeholders focus on end benefits and not just the technology that will get them there. Similarly, as proposed by Ulfelder (2001) when managing a system with a broad scope, it may be beneficial to apply a microproject concept and allow the concept of the larger undertaking to take shape over time. With either proposed approaches and regardless of their champions' intent, there is likely the risk of losing clarity in the operationalization of objectives and the approach may be somewhat susceptible to vision creep.

Lastly, the leadership of the central project manager was often believed to be driven by technology and resource concerns, and not always the business requirements of the project's stakeholders. In a government setting, this is not an atypical behavior. This issue was never fully resolved, but some of the others described in the foregoing were. Generally, the project suffered from a lack of project management experience and knowledge on many fronts, but the adoption of well-documented best practices may have addressed or prevented some of the challenges experienced in the JIMS project.

While there are many best practices documented in the current literature, a few examples will highlight the value that applying such practices may have had for the JIMS project. Practices such as identifying the need to conduct a stakeholder analysis (Morris, 1994; Briner et al., 1996; Cleland, 1999) may have alerted the central project manager as to the motivation of some project participants and created an opportunity to better manage the risks that these stakeholders presented to the project. Briner et al. (1996) identify three groups of stakeholders: internal, external, and customers. Constituents from all of these groups should be considered when conducting a stakeholder analysis. Such an analysis also makes imminent sense, as the key to project success is meeting stakeholders' expectations.

Similarly, the JIMS project adopted a vision but it was seldom referred to except to justify funding or when renewed energy was required in a time of crisis. As many writers on leadership agree, vision must be continuously maintained foremost in the minds of project team members and active stakeholders. All too often, the project vision is disregarded and attention is misplaced on the business requirements or technical specifications of the system. Similarly, the end benefits are forgotten and all of the attention is focused on the technology. For any project to succeed, this cannot be allowed to happen.

It is also unlikely that passion will grow unless there is a strong, core project team. The JIMS project saw little in the way of scheduled, structured, or prepared team building. Some cathartic team cohesion occurred as a result of people being together and involved in a common purpose, but this fell far short of what was required. The term "project team" is actually a misnomer for the central JIMS project management group, as they had few of the qualities necessary for an effective team as suggested by numerous authors on teamwork. Katzenbach and Smith (1993) noted such qualities as problem solving, task effectiveness, and maximizing the use of all members' resources to achieve the team's purpose. If a larger investment has been made toward team building, the opportunities for the creation of a shared vision and mission may have increased. Similarly, team building and the dynamics of group cohesion would likely have made it more difficult and less likely that the problematic stakeholder group would have walked away from the project.

Vision Characteristics	Case 1 Novo Nordisk	Case 2 Matsushita	Case 3 Taurus	Case 4 JIMS
1 Easily understood	Yes – by all	Yes – by Japanese employees, but No – by "foreign" employees.	No – by all participants, different understanding of the core purpose by different stakeholders.	Yes – but tacitly at first; however, the vision and mission became later confused.
	___	___ (part) ___ (mainly)	___	___ (mainly)
2 Motivational and inspirational	Yes – at first, many saw the process as intrusive and greeted it with skepticism and suspicion; later the Knowledge Management advantages were appreciated and it was highly supported.	Yes – by Japanese employees the Japanese identity, history, and cultural legacy was very strong, but No – for "foreign" employees.	No – it appeared that, in general, the lack of focus, the massive scope creep, and difficulties in ever seeing the light at the end of the tunnel was a very large negative.	No—for a crucial stakeholder who "paid lip service" to be inspired, but failed to commit resources and energy. Probably a system design fault through failure to fully consider participant rewards.
	___	___ (part) ___ (mainly)	___	___
3 Credible	Yes—it made sense to employees as a sound way forward.	Yes—for older and more senior Japanese No—for younger Japanese and foreign employees due to not "walking-the-talk"	No—it appeared that the general confusion resulted in unrealistic expectations and ideas of what could be achieved.	Yes—but one principle stakeholder did not share the belief in the project beyond its own needs.
	___	___ (part) ___ (mainly)	___	___ (part)
4 Working smarter, stretch goals	Yes—best practices identified and welcomed for widespread uptake.	Yes—best practices within Japan No—for outside Japan, due to the corporate dogma that best practice can only come out of HQ in Japan.	No—the chaos and confusion accompanying an ever-widening scope did stretch people, but not to do things smarter—there was a lot of re-work and abandoned work.	Yes—the concept for the integration across the supply chain of information to provide superior service delivery was recognized.
	___	___ (part) ___ (mainly)	___	___
Overall Rating	Best practice vision	A good vision for Japanese but not for outside Japan	A weak and enfeebled vision that failed to focus the project.	A strong vision, but weakly implemented at first through lack of central authority. A strong transformational leadership input emerged to retrieve the situation.

Table 1. Vision characteristics from example cited in the literature

Lastly, project managers need to have authority over their domains (Briner et al., 1996). In JIMS the central project manager did not have such authority nor did many of the core agency project managers. The central project manager was not given the structure to control or manage the core agency project managers or their individual processes as is highly recommended by (Sauer et al. 2001). This lack of clear project management authority in a single individual may have contributed to the dissention of stakeholder buy-in and general project ownership.

Any project, but especially a project with multiple stakeholders who have diverse interests, needs to have a shared and prominent vision fostered by a recognized and empowered project manager. This case study investigation exemplifies a major need—it suggests more attention should be paid to stakeholder analysis and project-leader behavior in the promotion and adoption of a shared vision. In addition to the impacts attributed to stakeholder characteristics and project leader behavior, we suggest that the organizational environment in which a project exists also impacts project vision. However, more investigation is recommended. While alternative approaches may be required for different types of projects, what does seem clear is that it is in everybody's interest to promote and sustain a shared vision and to support leadership behaviors that will encourage and endorse this approach.

It should be noted, however, that the project (despite not fully meeting all the needs of all stakeholders) was judged highly successful by the remaining core stakeholders and the sponsoring government. . The system does not fully meet the anticipated functionality for all stakeholders, but it was judged by its peer-group developers from elsewhere in the continent to have superior performance to other similar projects at a lower cost and in a shorter development and delivery time. This was believed to be due in no small part to the vision being held together and maintained despite setbacks and its birth as a "whitespace" project in which substantial stakeholder commitment and belief in its value was initially placed.

Discussion and Conclusions

This paper has explored the role of a project vision as a critical success factor

to project outcomes. We have investigated the concept of vision from a number of perspectives. We defined it as it occurs in the common dictionary and also refined this definition in terms of the business literature as vision appears as a corporate tool. We then extended our discussion of this concept to apply to a project vision. We identified four characteristics that a vision should possess: it must be understood; it must be motivational; it must be credible; and it must be both demanding and challenging. We then linked vision to a transformational leadership style, arguing that as projects are transformations and that as vision is an idealization of a transformation, then transformational leadership should be evident in successful projects.

We then continued to explore four case studies. The first three drawn from the literature were chosen to provide one successful example, one partially successful example (from the organization's home country but not from its foreign subsidiaries' point of view), and a spectacularly unsuccessful project example. Our fourth case study was discussed in some detail and related to an interesting IT project that one of the authors had an intimate involvement with, and deep insights and sources of information on.

In comparing and contrasting the three examples from the literature and the case study experienced by one of the authors, the following observations and analysis can be made.

Table 1 provides a four-point vision characteristic appreciation that helps us to understand the important elements of a vision that contributes to its success. Clearly, not all elements need to fully active constantly for project success to be an outcome; however, they should be present at some period during the project's execution and preferably, all present all the time. These categories also matched well with a transformational management style and, as was shown, do so in terms of the four I's: individual consideration; intellectual stimulation; idealized influence; and inspirational motivation. Thus, we argue for a link between development of an effective project vision and transformational management.

We also indicated how a project vision could be developed, and stressed that while a charismatic leader may provide much energy and useful motivational impulse to the development of an effective vision, a stakeholder reference group may form a more enduring framework for vision development and planned deployment. This is largely due to a more inclusive and more diverse set of experiences to be drawn upon in formulating both the vision itself and a deployment strategy.

Our intended contribution is to highlight best practice in vision development and to a lesser extent, its deployment. Our chosen case studies provided useful evidence for our analysis and the JIMS case provided an in-depth example for us to draw upon.

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DALE CHRISTENSON is Acting Executive Director of the Leadership and Learning Centre of the Public Service Agency for the province of British Columbia. He is currently enrolled in the Doctor of Project Management program at RMIT University in Melbourne, Australia. His undergraduate and graduate studies at Simon Fraser University were in the field of Criminology. He also holds a post-graduate certificate in Project Management from Royal Roads University.

Mr. Christenson's current areas of research interest are critical success factors of project management, strategic alignment of projects and organizational direction, and innovative application of project management methodologies. Mr. Christenson has been responsible for a number of information technology projects. He has successfully applied project management methodologies to the area of program development and strategic plan implementation.

Mr. Christenson is also a seasoned lecturer and teaches at Athabasca and Royal Roads University in various areas of project management. He has over 20 years of lecturing experience in a wide variety of forums and venues. Mr. Christenson is also a Project Management Professional (PMP®) certificant, through the Project Management Institute.

DEREK WALKER is Professor of Project Management and Program Director of the Doctor of Project Management (DPM) program at the Faculty of Business, RMIT University. He worked in various project management roles in the UK, Canada, and Australia for 16 years before commencing his academic career in 1986. He obtained a Master of Science from the University of Aston (Birmingham) in 1978, and a PhD in 1995 from RMIT University (Melbourne). He has written over 100 peer-reviewed papers and book chapters. His research interests center on innovation diffusion of information and communication technologies, knowledge management, project management, and project procurement systems.