CHAPTER ONE

Introduction

Richard J. Klimoski
George Mason University

Beverly A. Dugan
Human Resources Research Organization
(HumRRO)

Carla Messikomer
Project Management Institute (PMI)

François Chiocchio
Telfer School of Management, University
of Ottawa

Human Resource Management Project Scenarios

Consider the following:

- You are tasked with conducting a research study in a way that will satisfy the legitimate claims of parties involved in high-stakes litigation. How can you do so in a manner that maintains your neutrality?
- You discover that a major subcontractor/supplier has failed to follow an agreed-on standard of quality for reports that must serve as input to assessments that have career ending potential. What should you do?
- You are responsible for maintaining the vision for an initiative that is being carried out over a ten-year period, despite

turnover of key personnel. You are able to do so, but by what means?

• And what if you must do any of these things using project-based management structures? Would you know how? This is what this volume is all about.

Overview

The practice of human resource management (HRM) is rarely a solitary activity. Much of the design, development, implementation, or evaluation of practitioner-generated human resource products or services requires the assembling of a diverse cross-section of subject matter experts and the leveraging of all this talent in order to perform well within the context of a "project" structure. The Project Management Institute (2013a, p. 3) defines a project as "temporary endeavor undertaken to create a unique product, service, or result." We could add that projects, including those in human resources, also require the acquisition and organization of considerable resources, the coordination and collaboration of multiple stakeholders, and the capacity to manage these over an extended period of time, often in the face of ambiguity and uncertainty. Another way to think about this is that HR projects usually call for progressive elaboration of work products, all the while addressing both the upside and downside risks.

This volume is about conducting human resource projects. It aims to bring project management in the HR context from background to foreground by exploring the intersection of project management and HR research and practice. As such, it builds on what those in other professional service fields (e.g., architecture, engineering, IT) have learned about project management, the knowledge and experience of those who manage HR projects, and what project management research has demonstrated. Thus, we will highlight those features of managing projects that are almost universal, including topics such as project initiation and planning, budgeting, or the meeting of legal contractual requirements.

For this volume we have chosen contributors from both the human resource management arena and from the field of project management in order to benefit from the knowledge, experience,

and lessons learned by members of these communities of practice. In this regard, the background of the co-editors also reflects this diversity. In addition, the perspectives of both practitioners and academic researchers are represented among the chapters in this book.

Brief Overview of the History of Project Management

While the practice of project management (PM) has been around throughout human history, its formalization took hold roughly fifty years ago with the post-WW II boom in manufacturing (Cleland, 2001). Initially a skill set associated with the construction industry, defense, and military organizations, "managing projects" has become a core approach in many organizations, both in developed and emerging economies, to get products to market, to implement large and complex infrastructure initiatives, to effect organizational change (Knutson, 2001), and to implement organizational strategy. The continuing expectation that PM will gain popularity is based on shortened market windows and product life cycles, rapid development of emerging economies, the increasing complexity of technical products, heightened international competition, and downsizing associated with organizational resource scarcity (Pinto, 1998). Project management is one of the top three most sought-after skills and investment in infrastructure projects approaches a fifth of the world's GDP (World Bank, 2012).

The growth in the numbers of PM practitioners adds detail to the story of PM's rise. Since 2000 the number of project managers holding the Project Management Professional (PMP) credential skyrocketed from roughly 27,000 to more than 590,000 at present (PMI, 2013b). As the field of practice has expanded, the number of universities teaching project management and the number of degree programs within them has grown apace. In 1994 only two bachelor's and nine master's degree programs were offered in the field but, less than fifteen years later, more than 630 schools worldwide offer upwards of 880 degree programs (PMI, 2013c). While the increase is significant, it is not sufficient to meet the ever-increasing demand for more and better-trained managers, fueled, in part, by the anticipated

retirement of a large cohort of current practitioners (Andrews, 2008). Contributing to the ascent of the field and its road to professionalization (Zwerman, Thomas, Haydt, & Williams, 2004) has been the creation of new knowledge by PM scholars: the number of PM-focused scholarly papers published in journals of allied disciplines, including those of the Academy of Management, has doubled every decade since the 1950s (Kwak & Anbari, 2008). While academics, particularly in social sciences, seldom lead practice, there is a need for academia to help close the talent gap that currently exists in project management. Doing so by designing curricula responsive to the needs of business will engage students, improve the university's bottom line, and contribute to success of project-oriented organizations across all sectors of the economy worldwide.

Project Management in the HR Context

This volume focuses on the special challenges that arise when the work to be done is tied to initiatives that are focused on people in the workplace. Among other things, the people who are affected by project activities and outcomes are in an excellent position to thwart or facilitate success. Moreover, the demands of stakeholder management in those settings where HR projects are carried out will also have distinctive features and will call for solutions peculiar to the sub-sectors of the HRM field. Accordingly, we emphasize the importance of context and the wisdom that has accrued to those practitioners who have successfully addressed such demands. Finally, we point out that projects focused on HRM issues usually have a strategic function. Many are designed and implemented not just to solve an immediate problem but to contribute to the long-term viability of the firm. Accordingly, many such efforts are associated with changing the organization in some important way—to increase efficiency or effectiveness.

There is no shortage of examples to point to. Some of the "prototype" projects that may come to mind include:

• Culture change/organization development (for example, team building, strategic planning)

- Development and implementation of talent management systems, with or without implementation of new technology
  - Personnel selection and promotion
  - Performance management
  - Training programs
  - Employee and leader development
- Program evaluation
- Implementation of client/workforce survey programs (employee opinion, customer satisfaction)
- Human capital planning (for example, workforce and succession planning, turnover projections)
- Ensuring the success of mergers or acquisitions
- Starting up a new facility, new product, or service line
- Corporate restructuring efforts, including a "turnaround"
- The implementation of a new HRIS platform

Such HRM efforts require people to come together to design, develop, and implement a sustainable solution to meet some organizational need. Key stakeholders, but especially members of the workforce, have to be involved in such things as project advocacy, design, execution, and/or project sustainability. The effectiveness with which people are managed has a significant impact on the outcomes of these efforts. The purpose of this book is not to focus on the details of each type of HR project, but to share best practices and lessons learned in managing such efforts.

Our approach for this volume reflects our belief in "evidence-based practice" (EBP). As such, the chapters, individually and collectively, endeavor to summarize and apply the best research evidence available for the conduct of HRM projects. But consistent with current views of EBP (e.g., Rousseau & McCarthy, 2007), our authors offer insights based on their professional experience. This is what is typically required in order to translate research findings into useful interventions. Finally, EBP also places the needs and views of the client as a central feature. As such, the skilled practitioner not only relies on empirical findings and professional judgment, but is also sensitive to the needs of stakeholders to the initiative. In this regard, client participation is always critical when it comes to ensuring the success of human resource projects. This often implies the need to closely

align efforts when it comes to such things as the specification of project goals, a clear articulation of parameters such as the confidentiality of data and speed of project execution, but especially, the implementation of project outputs and tracking the long-term project outcomes.

This book starts with a description of four cases that provide insight into the kinds of settings or contexts in which HRM practitioners must manage projects. Each case provides context-specific information and learning with regard to the issues confronted by those involved. But the authors also provide evidence for principles of action that might transcend specific settings. Thus, the reader can choose to focus on the context that is most relevant to his or her practice domain. Alternatively, those who want a comparative perspective will find value in contrasting the lessons learned and presented relative to each context.

Moreover, each case is structured around the notion of project life cycle. In this regard, each case highlights such things as how the project came into being, the way that the project's scope and budget were established, and details on how the work on the project was conducted and brought to a close. Each addresses the way that the project's output was or was not implemented as planned. The case authors also describe the challenges inherent in each phase of the project and the wisdom gained as these were addressed.

This volume is intended to be useful to a variety of readers.

First and foremost, we offer practitioners who may be located in any number of organizational contexts (e.g., consulting organizations, state or federal government, universities, and the military) a state-of-the-art description of the challenges endemic to HR project management in and across such contexts. We also provide a critical examination of potential solutions available to meet such challenges.

This book will inform the efforts of those who are in a position to develop future talent for the HR professional practice community. Most obvious, perhaps, we hope that graduate program directors in psychology, management, and project management will look to this volume to help in their preparation of students for the world of work. But it should also be useful to project managers who are interested in developing their team members or for

training directors responsible for increasing the talent pool for their organizations as well.

Material from the volume could easily be incorporated into workshops or short courses. This approach to knowledge dissemination fits in well with the mission of scientific and/or trade organizations that are committed to providing continuing professional education opportunities for their members.

Finally, we hope that the volume will also serve as a signal to the general business community that the field of human resource management practice has matured. We are no longer a field made up of independent consultants or academic entrepreneurs. The nature of the applied problems that practitioners must address in a global business environment call out for the creation and management of substantial and elaborate project platforms in order to be successful.

Structure of the Volume

Section One: Cases Studies: Context Matters

This section is made up of case studies. Each author was selected because of his or her experience in initiating and managing significant HRM projects. The cases provide context to the material that follows under Section Two: Fundamentals and Section Three: Applications. The case study authors describe real HR projects, including the requirements, challenges, and lessons learned.

Chapter Two. Redesigning Microsoft's High Potential Development Experience by Shannon Wallis, Arrow Leadership Strategies. This case describes a large-scale, global project in a publically traded firm that was managed virtually. The author describes the project management challenges associated with integrating thirteen high potential development programs into a single, centrally managed program. Project team formation and management, stakeholder management, and coordinating globally were all important to the successful design and implementation of the new program.

Chapter Three. Litigation-Driven Human Resource Management Changes by Suzanne Tsacoumis, HumRRO, and Michelle Davis King, who is retired. The authors describe the

implementation of a large-scale overhaul of promotion and performance appraisal practices under court order in a large federal law enforcement agency. The work had several components that had to be brought online in a timely and carefully sequenced way to ensure that a new promotion-assessment system met the specifications of a settlement agreement.

Chapter Four. Project A: Five Keys to Management and Scientific Success by Michael G. Rumsey and Paul A. Gade, Army Research Institute (retired). Project A has been one of the most visible (and arguably successful) projects ever carried out by members of the human resource practice community. Its scope, complexity, and impact have been noted by many writers. The authors were in an excellent position to write about the special challenges of managing a project of such scope, significance, and potential impact.

Chapter Five. Managing Critical Assessment and Development Components of a Global Leadership Development Program by Robin Cohen and Lisa Littrell, Bank of America, and Seymour Adler and Lorraine Stomski, Aon Hewitt. This case describes the implementation of a global leader assessment program. The case study highlights challenges of working across organizational boundaries and the complexities inherent in implementing assessments across cultures.

Section Two: Fundamentals: Transferable Wisdom

This section of the book summarizes best practices relative to specific aspects of project management that transcend particular projects or contexts. These chapters describe what project directors do to prepare for, initiate, plan, and organize a project. Two key technical elements of project management are also covered in this section: contracts administration and maintaining security.

Chapter Six. Preparing for an HR Project by Ren Nygren and Scott Erker, Development Dimensions International (DDI). This chapter describes how to set up a project. The authors discuss the importance of project planning for HR projects, contextual factors that should be considered, project planning risks and strategies to mitigate them, and they demonstrate how project directors utilize tools and processes to start up a project.

Chapter Seven. Project Initiation by Reid Klion, *pan*, and Julia Bayless, Sodexo. This chapter describes project initiation from the perspective of two different teams involved in project initiation: (a) the internal team that identifies the need, secures project funding, and issues an RFP to solicit vendors to perform the work and (b) the vendor organization that reviews and evaluates the RFP and establishes a team to respond to the proposal—a project in and of itself. The chapter concludes with selecting a vendor and starting the project.

Chapter Eight. Planning and Organizing by Monique Aubry, University of Quebec at Montreal. This chapter provides an overview of the project planning process and practical insight into how to undertake such a process, with special emphasis on human resource (HR) projects. The specific topics include developing a work breakdown structure, work package description, and project network; defining the responsibility assignment matrix; establishing the project baseline, which includes the staffing plan and costing; and evaluating the impact of project scope and complexity (scalability) on tools and the approach used in planning and organizing.

Chapter Nine. Effective HR Project Execution: Understanding Project, Team, and Stakeholder Issues by Peter A. Hausdorf, University of Guelph, Stephen D. Risavy, Wilfrid Laurier University, and Philip E. Hunter, University of North Texas. Despite extensive planning for human resource projects, their success ultimately depends on successful execution. The authors review basic project execution issues and specific HR project challenges that contribute to project outcomes. From this foundation, the implications for effective HR project leadership are discussed within the context of practice and research.

Chapter Ten. Contracts Administration for HR Practitioners by Macie Paynter, Kerri Ferstl, and Ryan O'Leary, PDRI. This chapter covers what project managers need to know about the basics of contracts administration. It defines the term contract, describes some basic types of contracts, and overviews legal roles and responsibilities. It covers important topics in contracts administration, such as billing schedules, legal and regulatory requirements, and managing scope changes. Finally, it describes typical contractual agreements between parties in a contract.

Chapter Eleven. Maintaining Security by Lucas Kuhlmann, Pearson. Maintaining data security is of critical importance in projects that involve sensitive information, such as test materials and scores, personally identifiable information, and proprietary information. This chapter provides guidance to project directors on maintaining the security of information, including the steps required and roles and responsibilities of the project team, vendors or subcontractors, and IT staff.

Section Three: Application: Strategic Issues

The chapters in Section Three go beyond the fundamentals in that each chapter addresses a critical project management topic that cuts across the areas covered in Section Two. Global project management, managing stakeholders, project leadership and project teams, developing project managers, knowledge management, and ethics and governance are important in all project phases, from initiation to closeout.

Chapter Twelve. Managing in a Global Environment by Terry Cooke-Davies, Human Systems International, UK. In this chapter the variations in and the importance of institutional contexts in which global projects unfold are discussed. Several issues associated with managing in a global environment are covered, including cultural issues and diversity, the challenges of managing virtual global project teams, complications imposed by differences in times zones, and the impact of project complexity. The critical role of the project sponsor is also highlighted.

Chapter Thirteen. The Development of Project Management Skills by Beverly A. Dugan, Human Resources Research Organization (HumRRO). This chapter begins with an overview of three extant project manager competency models and a brief review of the applied research on project manager competencies. The author then reviews the research on how leaders and managers develop and concludes with some thoughts on the implications of the research on project manager competencies and the leader development process for the development of project management skills.

Chapter Fourteen. Leading and Managing Projects: Insights from the HR Quadriad by Karin Bredin, Linköping University,

Finland, and Jonas Söderlund, BI Norwegian Business School, Norway. The authors highlight important lessons from previous research on leading and managing projects, with a particular focus on leadership and the project manager's role in the area of human resource management. The chapter draws on research centered on HRM in project-based organizations and the HR quadriad framework, which regards HRM projects as a shared, collective responsibility of several players in the organization.

Chapter Fifteen. Toward a Comprehensive Project Stakeholder Management Approach for HR Projects by Martina Huemann, Vienna University of Economics and Business, Austria, and Dagmar Zuchi, Roland Gareis Consulting, Austria. This chapter distinguishes between managing of stakeholders and managing for stakeholders and highlights the importance of both in achieving stated project outcomes. It further addresses the importance of identifying client(s) and stakeholders, building and maintaining relationships, and managing multiple requirements and interests.

Chapter Sixteen. The Four Cs of Human Resource Project Teams: Context, Configuration, Cycles, and Challenges by François Chiocchio, Telfer School of Management, University of Ottawa, and Peter A. Hausdorf, University of Guelph. This chapter addresses contextual factors, HR team configurations, project cycles, and challenges relevant to teams working on two overarching types of HR projects. The first type focuses on projects that aim at enhancing workforce capability, such as developing a selection process, implementing training, and fostering leadership through the use of 360-degree feedback. The second type of HR project aims at supporting the organization's transactional activities. Implementing an HR information management system is an example of the second type. Because team adaptation is such an important factor in team performance, the authors focus on how HR project teams must adapt to the features of the projects they are undertaking.

Chapter Seventeen. Knowledge Management in the Project Context: What It Means for HR Projects. In this chapter, François Chiocchio, Telfer School of Management, University of Ottawa, Carla Messikomer, Project Management Institute, and Christian Dagenais, Department of Psychology, Université de Montréal,

address challenges of knowledge sustainability in the temporary context of projects. Stemming from Nonaka and Takeuchi's (1995) model of how organizations learn, the authors focus on ways to ensure knowledge transfer within and between HR projects.

Chapter Eighteen. Ethics and Governance in the Temporary Organization by Ralp Müller, BI Norwegian School of Business. The chapter provides a brief introduction to business ethics, touching on the philosophies of ethics, research-based theories on the psychology of ethics, and theories on moral reasoning and ethical decision making. It includes a discussion of the most severe ethical issues in projects and measures that organizations take to prevent and respond to ethical violations. Several research-based approaches to training in ethics and a tool to help managers in ethical decision making are presented.

Section Four: Conclusion

Chapter Nineteen. HR Project Cases, Fundamentals and Applications: Lessons Learned and Other Advancements. In this final chapter, the editors reflect on the collection of chapters and ask key questions HR project managers and team members may want to reflect on. How well are we doing in HR project management? What is the role or importance of sponsorship and stakeholder management? What is the role of tools, techniques, or practices when it comes to HR project management? What is unique about HR project management? How should we prepare individuals to be good HR project managers? How should we go about evaluating the effectiveness of an HR project? What about the science of HR project management? How can we best promote the cross-fertilization among disciplines to advance HR project management? The editors' answers and thoughts on these questions provide a framework on how to advance HR project management.

References and Further Reading

Andrews, E. (2008). Project management: The need for talent. *Global Focus, 3*, 48–51.

Cleland, D. I. (2001). Overview: The discipline of project management. In J. Knutson (Ed.), *Project management for business professionals: A comprehensive guide* (pp. 3–22). Hoboken, NJ: John Wiley & Sons.

Knutson, J. (Ed.). (2001). *Project management for business professionals: A comprehensive guide.* Hoboken, NJ: John Wiley & Sons.

Kwak, Y. H., & Anbari, F. (2008). *Impact on project management of allied disciplines: Trends and future of project management practices and research.* Newtown Square, PA: Project Management Institute.

Nonaka, I., & Takeuchi, H. (1995). *The knowledge-creating company: How Japanese companies create the dynamics of innovation.* Oxford, UK: Oxford University Press.

Pinto, J. K. (1998). *The project management handbook.* San Francisco, CA: Jossey-Bass.

Project Management Institute. (2013a). *A guide to the project management body of knowledge (PMBOK® Guide).* Newtown Square, PA: Project Management Institute.

Project Management Institute. (2013b). *PMI Department of Certification Database 2000–2013.* Newtown Square, PA: Project Management Institute.

Project Management Institute. (2013c). *PMI Department of Academic Relations Database, 2008–2013.* Newtown Square, PA: Project Management Institute.

Rousseau, D., & McCarthy, S. (2007). Educating managers from an evidence-based perspective. *Academy of Management Learning and Education, 6,* 84–101.

World Bank. (2012). *World development indicators* (database). New York: Author.

Zwerman, B. L., Thomas, J. L., Haydt, S., & Williams, T. A. (2004). *Professionalization of project management.* Newtown Square, PA: Project Management Institute.