

## Twenty Years of Thought Leadership: The House that Research Built

How does one sell expertise?

What causes potential clients with millions at stake in mission-critical programs to invite you into their organizations?

PM Solutions is a niche management consulting firm established in 1996 to provide project and program management services and, via its subsidiary PM College, project management training, to organizations across a variety of sectors

It was clear to our founder, J. Kent Crawford, that clients were really buying *knowledge* and that the way to demonstrate our superior understanding of the issues they faced, was to base all our consulting and training on original thought leadership: research, white papers, case studies, books and other publications. We can proudly say we were a thought-leadership based firm before the term “thought leadership” was coined. The following sections describe how thought leadership has built and grown our company over our 20-year trajectory.



Project management, as a discipline, was at a turning point in 1997 when our founder first conceived of a tripartite firm where the consulting and training practices were both based on original research. Just prior to founding PM Solutions, Crawford had been President of the Board of the Project Management Institute and had presided over a period in which the professional association’s membership grew by over 50%. One of the key program areas that contributed to this was the expansion and professionalization of the PMI Publishing Division. The rapid growth of the association occurred in conjunction with the creation of PMI’s first website and the posting for free download of the PMI standard, *A Guide to the Project Management Body of Knowledge*. During this same period, the Publishing Division launched a book publishing program and the Institute established a Literature Award. Crawford saw that sharing knowledge was a powerful draw and these experiences led him to establish a research and publishing division, initially named The Center for Business Practices, integral to PM Solutions marketing and services delivery. In 2009, the CBP was rolled up under the Marketing department and renamed PM Solutions Research.

By the mid-1990s, it was clear that, while project management was essential to keeping projects on track, there were not enough resources available for companies to tap into in order to solve persistent performance issues. What research existed in the field was in most cases too academic to be of use in a business setting. The founders’ personal experience both as consultants and as leaders within PMI told them that project managers and executives were in need of data that would validate best practices that could be quickly deployed in the project setting. In particular, project managers struggled to validate the benefit of employing project management techniques. Again and again, clients asked: How can I convince my executives of the value of project management?

In 1999, after an initial survey of existing research, as well as interviews with current and prospective clients, the team published “The Value of Project Management,” our first research

study, which gathered quantitative evidence from over 800 organizations to gauge the impact of investments in project management processes on a scorecard of business outcomes, including customer and employee satisfaction. For the first time, an accessible study described specific improvements in schedule and budget performance, as well as time to market and cost savings, deriving from the implementation of project management initiatives processes.

This study, and each of the 15 studies that followed it, included a follow-up step for generating new questions for research, by soliciting the participation of survey subjects in a series of qualitative interviews. These interviews explored findings that surprised us, or questions that were raised by the data, in further detail and provided the basis for future studies. By making the research reports a key touchpoint with clients and prospects, sales staff also elicited reactions to the findings and additional questions for future exploration. And, despite the fact that the research function has never had more than four staff members, it has been a point of pride to respond personally to requests for explanations of the findings or additional data.

There are three areas in which PM Solutions innovated in response to the needs of our clients

**Action Research.** In a fast-evolving field like project management, by the time best practices are collected and published, they are yesterday's news. The CBP set out to collect information from project managers "in the trenches" in order to catalog the freshest information. In this we were assisted by Dr. Frank Toney of the University of Phoenix, one of the early proponents of project management benchmarking. He invited us to be facilitators and recorders at the PM Benchmarking Forums he had established beginning in 2000, and handed the organization of these forums over to us in 2002. From 2002 through 2009, we invited groups of top project managers to share resources, problems and solutions, using the Forum data as the basis of many articles, books and research papers.

In addition, from 2006 – 2009, we convened the Strategy and Projects Summit, seeking to give project leaders who were doing the most advanced organizational applications of the discipline a place to share information and learn from our most recent research. These events also served to introduce PM Solutions to the level of the organization we needed to reach in order to sign new business. The action research events typified our approach to marketing: never a one-way communication, but always giving the practitioner or executive information of value. In this way, relationships were built which often translated into contracts over time.

### **The PMO of the Year Award**

A spinoff of the Strategy and Projects Summit, the PMO of the Year Award was first established by PM Solutions in 2006 to honor the unsung heroes who, we felt, were transforming organizations from within. The Award, given out at the Summit through 2009, and since then at the PMO Symposium, is now an official PMI award. Through the process of dealing with hundreds of applicants, and especially the winners and finalists, PM Solutions staff continued the process of building relationships with potential clients. The publicity surrounding the award, as well as the publication of a book, [\*An Inside Look at High-Performing PMOs\*](#) (2011), gained us further public recognition.

### **Research that Validates Best Practices**

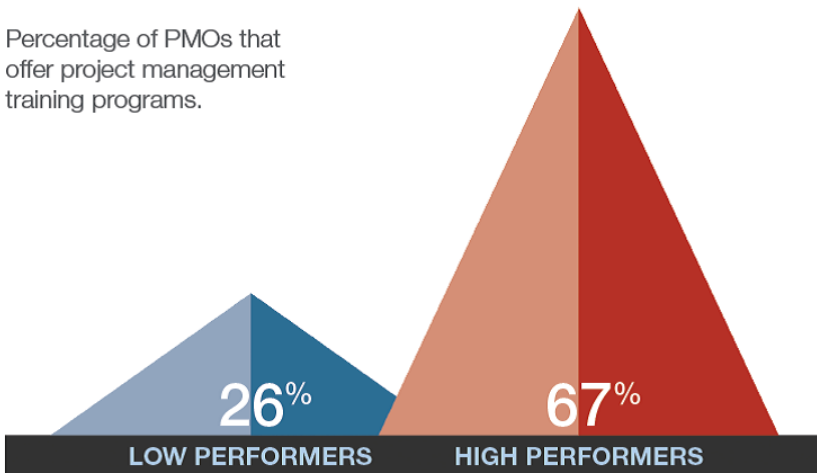
Unlike most of the research that was available, particularly in the first 15 years of our history, our studies actually peg the business value of specific practices. We do not only describe

trends, but explore which strategies are successful. By including in each study a set of organizational performance measures, and cross-tabulating these with questions about processes and tools employed, our studies deliver a unique value to the reader/user.

Through nearly 20 years of evolving to respond to market and client needs, PM Solutions has

## HIGH PERFORMERS MORE LIKELY TO HAVE TRAINING PROGRAMS

Percentage of PMOs that offer project management training programs.



been extremely successful in achieving our initial objective of basing our consulting and training practices and marketing presence on research data.

We publish at least one new research report annually, and the marketing plan revolves around the new data. We share it first with survey participants, then with webinar attendees, then through newsletters and articles, and finally on our website, where we discuss particular findings on our blogs. Qualitative interviews

yield further topics for blogs and articles. White papers are either created anew, or refreshed with new data. Each fresh piece of collateral becomes an opportunity to communicate with our market.

We have also partnered with CRC Press to publish three project management books:

- [The Strategic Project Office](#) (now in its second edition; the first edition won the PMI Literature Award in 2001)
- [The Project Management Maturity Model](#) (now in its third edition)
- [Optimizing Human Capital](#)

In addition, we have self-published [a series of 14 brief, focused books on specific topics](#); two e-newsletters and two print newsletters; and 13 white papers. Our training division, PM College, has published the textbook for our foundational course, [PM Essentials](#), with Maven House Press since 2013.

In keeping with Crawford's original insight that sharing knowledge is a powerful way to develop client relationships, the majority of the books we have published have been given away, to attendees at classes and presentations, and to clients and prospects.

Our materials have been reviewed or cited in publications including *The Project Management Journal*, *Baseline*, *Optimize*, *Computerworld*, *Training+Development*, *Projects@Work*, and by other much larger research firms such as Forrester and Gartner.

Over 30% of our business has come to us as a lead generated by interest in our research and publications; as a testament to the effectiveness of our consultants and trainers, the bulk of our

business comes from existing clients extending contracts, or from client referrals. An example of how our thought leadership both gains and keeps a client relationship is described in [this case study of DTE Energy](#).

**Not a quantitative data point, but a compelling indication** that our research not only wins us recognition and business, is the fact that we have seen a number of trends that we predicted or described early on, become standard in organizations and/or be adopted in the thought leadership of other, much larger consultancies. For example:

- We predicted the rise of a “Strategic Project Office” in 2001; in 2013, Forrester Research published a paper describing the Strategic PMO.
- We popularized the title/role description “Chief Project Officer” in the same year; by 2007, one of the companies vying for Project of the Year at the PMI Congress was led by a CPO.
- We proposed a role description for a Portfolio Manager—a role that did not exist at that time—within the PMO in our 2005 book, *Optimizing Human Capital*. Today this role is common in PMOs.
- In the same book, we recommended that project management roles, from admin to the VP level, be centralized within an Enterprise PMO and report to the head of the PMO. At that time, almost all companies operated on the matrix model, with the PMO having usually just a few staff members. Today, our [State of the PMO](#) research study tells us, this organizational structure is common.
- In our 2008 book, [Seven Steps to Strategy Execution](#), we foresaw the evolution of the Project Management Office into a Strategy Execution Office ... and in 2013, Gartner made the recommendation that this was what PMOs should strive for.

The list above shows that our thought leadership program has, over the years, not only described our marketplace, but framed the conversation within the project management discipline in powerful, practice-altering ways. There are hundreds of small project management consultancies; but only PM Solutions has built a name and a reputation based on thought leadership as represented by an extensive publishing list and a continually refreshed bank of data. Clients are often astonished to discover what a small firm we actually are, because we pride ourselves on the way we have become “consultants to the consultants,” providing research-based project management services and training to some of the biggest names in management consulting throughout our history. By making marketing a conversation about relevant data, instead of merely a push to sell, we plan to continue adding to the collective knowledge of the discipline and growing our firm in a way that expresses our values.