

Elisabeth Bittner, Walter Gregorc (Eds.)

Experiencing Project Management

Projects, Challenges &
Lessons Learned

SIEMENS



Bittner/Gregorc (Eds.)
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By Elisabeth Bittner and Walter Gregorc (Editors)

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Preface

Ten years ago, at the beginning of the new millennium, a new era of project management began for Siemens. The new project management initiative for Siemens, PM@Siemens for short, was created and supported for many years by Prof. Dr. Edward G. Krubasik, who was a member of the Managing Board of Siemens AG.

PM@Siemens, which focuses on providing constant improvement in project management, was designed and implemented from the outset by Dr. Hans-Jürgen Schloss, PM@Siemens Program Director, and Joachim Fischer, PM@Siemens Coordinator. Project management at Siemens has now become a benchmark, unique in its magnitude, consistency and sustainability. Another distinguishing feature of PM@Siemens from the very beginning has been its focus on people, alongside organisational and commercial aims, offering the best possible training for its project managers and an intensive exchange of know-how within the company.

From an early stage, there has been an emphasis on the career model for project managers with specially coordinated training. In the seminars and learning programs teaching project management methodology is closely linked to the communication and leadership skills of the project managers, with the exchange of know-how between colleagues forming the basis of the learning process. The Project Directors Community emerged from the group of participants and trainers who took part in one of these seminars, the first learning program for project directors at Siemens.

The community had already been in existence for four years when the idea for this book evolved in December 2008. We met once a year over a long weekend, maintained extremely open and honest communication, passing on our lessons learned and creating constant knowledge development for current project management issues.

We became a small, but thriving community, benefiting from each other's knowledge and experience and passing it on to others, for example, through peer group consultation for current Siemens projects. But we also kept ourselves to ourselves, we were largely unknown. We gained an almost "mystical" reputation, as one of us put it. Now it was time to make ourselves known! Public relations and public perception are two crucial factors in project management. We decided to invite young colleagues to get involved in the community and also decided to

write a book aimed at the business world, project managers and those who would like to become project managers.

This is the result: a collection of project management field reports and stories, opinions, experiences and personal challenges. It is not a textbook or a book on theory, but rather a loose collection of experiences, which are in no way representative, far from being comprehensive, but authentic. The experiences gathered here reflect the versatility and rich diversity of life as a project manager and provide us with an insight into the daily routine of project work.

With a high degree of openness and a large amount of trust in the competence of their own employees, PM@Siemens has created a basis on which the community, which initiated this book, can grow. Of course, high levels of commitment and self-initiative were also required of all participants. We would like to thank all our contributors for their commitment and in particular PM@Siemens, Dr. Hans-Jürgen Schloss, Joachim Fischer and the PM@Siemens coordinators for their faith in us and the financial assistance for this publication.

We have almost two years of research, persuasion, searching for sponsors and negotiations with the publisher behind us. We were lucky enough to work with understanding and knowledgeable consultants and editors, who gave us great freedom over the contents within the realms of possibility. We would especially like to thank our editor Dr. Gerhard Seifudem and would also like to thank everyone who provided us with their knowledge and personal experiences through their contributions or interviews.

*Elisabeth Bittner and Walter Gregorc
Munich/Erlangen, August 2010*

Staying on course

Over ten years experience with PM@Siemens

PM@Siemens – the name itself shows the age and the “Zeitgeist” in which this initiative was created. The “@” stands for the year 2000, for the internet boom and eBusiness, for the emergence of new business models and new possibilities.

Project management has long been of central importance to Siemens – it is one of the company’s main activities. “The percentage of project business as part of total revenue is over 50%”, said Joachim Fischer. So it is worthwhile taking time to ensure improvement and stabilisation in this area of business. In October 2000, the Managing Board, represented by Prof. Dr. Edward G. Krubasik, gave Hans-Jürgen Schloss and Joachim Fischer the task of improving project management at Siemens. Since that time they have been managing the initiative PM@Siemens, which is by now a company program, with Hans-Jürgen Schloss as Program Director and Joachim Fischer as Coordinator.

Did you know what you were letting yourself in for with PM@Siemens back in 2000?

Dr. Schloss (laughs): No, I didn’t and I didn’t anticipate it either. I certainly didn’t think that PM@Siemens would be celebrating its 10th anniversary this year.

Fischer: No, there is no way that the scale of the task and its longevity could have been foreseen in the beginning. We did have a vision, an idea, that we would standardise some aspects and implement them worldwide, but back then we didn’t imagine that it would keep us busy for more than ten years. After we were given the task of improving project management at Siemens we first thought about how we could accommodate the many different commercial operations. We began by forming a small team from the various divisions and proceeded to collect everything that is important in project management. From that basis we formed the first topics and work groups.

“Siemens is so large, examples of best practice can be found everywhere.”

What is the purpose of PM@Siemens?

Dr. Schloss: The Managing Board had discovered that project business was associated with higher risks and worse results than product business. The aim was to change this situation.

What is PM@Siemens, how can it be characterised?

Dr. Schloss: PM@Siemens is a program that aims to improve project management processes at Siemens AG. The aim is to establish a constant improvement process, in order to reduce risks for the customer and ourselves during project business. We want to support project managers, through, amongst other things, top quality training and certification. The aim was not to implement project management, Siemens has already been doing that for 160 years. It involved, and indeed continues to involve, the constant improvement of our processes.

How does the system – or program – PM@Siemens work?

Fischer: We adopted the well-known saying “If Siemens only knew what Siemens knows” and tried to find out what Siemens has to offer. We then proceeded to select the best elements, standardised them and convinced everyone else that it really was the best. We carried out the entire process without external or internal consultants, that’s because we were of the opinion that Siemens as an organisation is so big, that examples of best practice can be found everywhere – you just have to find them.

We were always a virtual team and we still performed our actual jobs at the same time. We didn’t just form a team somewhere at company headquarters and create a project, instead we always worked together with the project managers and those responsible for project management from the operating units. We processed positive input from the operating units and central functions and designated them as standard. They were and continue to be the canon of PM@Siemens.

Dr. Schloss: Yes. The basic idea of PM@Siemens was that it should be a joint effort between all those who were interested in improving project management. We have continued to be a virtual community of interested parties.

That sounds really easy...

Fischer: No, it wasn’t always easy. Of course it is a huge challenge to hold together a team of volunteers from all the different divisions of Siemens who were interested in implementing change. Everyone comes with the argument that they want to change something, but they don’t

want it to affect their own department, as their business is different to that of the others. That was always a challenge. The trick was to allow the working groups to operate independently, but also to guide them from time to time.

Dr. Schloss: Let's take the definition of milestones as an example. They were different for everyone. The example may seem trivial, but when certain terms have been used for many years it is incredibly difficult to give them up and try something new. But we did eventually succeed in this aim.

“The employees were of the opinion that we would succeed.”

So what were the essential milestones of PM@Siemens?

Dr. Schloss: One important aspect was the first version of our handbook, the PM Guide and before that the decision to produce such a handbook. The guide, together with the term PM@Siemens, is an important medium so that people are able to identify with PM@Siemens, which has continued until this day. We will continue to develop this “brand”, as it offers excellent company recognition.



The successive editions of the PM@Siemens handbook document the development of PM@Siemens standards and are a symbol for continuous development

The development of the career model and the associated implementation of certification for project leaders was also a crucial issue, because it enabled us to achieve the systematic training of our project leaders. This means we have ensured that there are also career prospects for project managers and that the project managers working within the framework of personnel development processes of the company are systematically screened, discussed and consulted by the human resources department and the management each year. Project management is a matter of experience and that is why it is important to us that our project leaders continue to work on their assignment for as long as possible. Each year in which they gain extra experience is of benefit to the company.

Another important milestone was the Siemens project categorisation which was implemented worldwide. In the beginning, I personally did not believe that it would work out. But the employees were of the opinion that we could do it and we did indeed succeed.

Fischer: We also made a big impact with the introduction of “PM Experience”, a strategic board game for PM@Siemens on the subject of project management. The game brought together all of the roles and functions involved in a project and encouraged common understanding. It has now been played by over 20,000 participants worldwide and has provided a high degree of support during the roll-out of PM@Siemens topics. Communication and the development of a common language between the individual roles in the project is the key experience. This is because communication plays an important role in project management.

Dr. Schloss: We proceeded to introduce assessments in order to determine the maturity of an organisation for project management (Maturity of Project Management Assessment or MPM Assessment). Carrying out such an assessment and repeating it after a certain period of time to establish whether the organisation has improved its level of maturity, is an important tool for constant improvement. The level of maturity is measured by a number between 0 and 5: and (*laughs*) as level 5 is almost unattainable, it is also a useful method in order to keep improvement programs running smoothly in the long-term.

We also had a major breakthrough with the LoA process (Limits of Authority). It is an approval process during the preliminary stage, that is to say in the acquisition phase of a project, which incorporates the management team, makes the risks transparent at an early stage and as a result means that informed decisions and escalations processes can be carried out.

Fischer: Yes, we now have clear ground rules about when management is to be included. We are aware of all risks before we submit a bid



Dr. Hans-Jürgen Schloss during a meeting of project leaders

to the customer. The management also know about the risks and this is confirmed by a signature. Nowadays, we consciously accept or turn down assignments. The management takes a closer look and, if necessary, takes appropriate measures at an early stage. There will always be risks, but that is because we are an innovative company, constantly offering new technology. But we want to fully understand these risks and not discover them when the project is already underway.

Dr. Schloss: There are now over 100,000 Siemens projects recorded in the tool, which we developed for the LoA process and over 40,000 of our employees use the LoA tool. This process is now deeply ingrained in the business structure of Siemens.

It was also very helpful for company-wide activities in order to improve our compliance. With the LoA process PM@Siemens ensures that the compliance guidelines are accurately observed during the acquisition of major projects.

Fischer: The current fifth version of our hand book was a personal highlight. I didn't always believe that something new could be added, this was also due to the major reorganisation which took place at Siemens, dividing it into three sectors with their respective divisions. But we did actually take yet another big step forward with the new edition of the PM guide.

“It would be boring if we had already achieved our goal.”

What are the fundamental changes you were able to implement – alongside data, facts and figures?

Dr. Schloss: We have achieved greater transparency. By that I don't just mean the transparency which the management units now have for their project business. For me it also includes dealing with the results of transparency, in particular the constant search for improvement possibilities. I am convinced that a company can only be successful in the long-term if it constantly works to improve itself. If I realise there is an area where I can do something better, that should not be taken as a criticism that I haven't been working well enough up until now. Instead it should be viewed as an extremely encouraging process, which gives me the opportunity to become better. The attitude that “I'm certainly not perfect, not quite good enough and in any event I have the responsibility and the opportunity to improve myself” is the basis for a learning enterprise to continually improve itself. A big ambition of mine is to bring about and maintain this mentality. We have already made a big step forward with over 180 MPM assessments. However, transparency has not been welcomed as much as we would like. But as long as we still have the potential, we also have the opportunity to help the company to advance. It would be boring if we had already achieved our goals. But as we will never reach the end, it will always remain interesting.

Fischer: It is a great source of satisfaction to me that PM@Siemens has arrived all over the world. It's great when I'm abroad, for example in China, and I see our PM guide lying on a table and I realise that PM@Siemens is part of everyday working life. This demonstrates to me that PM@Siemens really has been accepted by project leaders in the Siemens organisation and hasn't been left lying somewhere or ended up in an office cupboard.

Dr. Schloss: The significance of the project manager in the organisation has also changed. Nowadays, the organisation is aware that project managers are responsible for a large part of business and that they make decisions every day which involve many millions of Euros. They also appreciate that the decisions are taken by very responsible people and are often made under very difficult circumstances, whether in the desert, in the depths of the Canadian forests or in the middle of a megacity. The fact that this has been recognised and is taken into account in the career model is an important outcome of PM@Siemens. Of course, there is also potential for improvement in this regard and we are constantly working on this.

How do you assess project management at Siemens from a market perspective?

Dr. Schloss: At present, we are considered by many to be a benchmark. We become aware of this when other companies approach us and want to measure themselves against us or invite us round in order to find out more about our modus operandi. There is, of course, no standard with which we can measure ourselves to determine that our company is better than others, but I would say that we have an excellent reputation. However, that should not prevent us from constantly working on our own development.

We have also won international awards, for example, last year we were presented with the Excellence Award by the International Association of Project Management (IPMA), for a Mobility Division project in China. Public recognition is important to us. It is particularly important that our customers know that they are dealing with professionals, when they order an installation from Siemens.

Fischer: We have now reached a stage with internationally recognised project management institutions, such as the IPMA, where we no longer copy each other, but instead work together efficiently. This enabled us to launch our first pilot project in Austria, where we coordinated and combined the topic of certification. We also harmonised the contents of our training program. Our requirements regarding certification are slightly different to those of IPMA and in part more rigorous because, amongst other reasons, we have integrated internal Siemens topics.

What do you see as being the essential challenges of project management?

Dr. Schloss: The fact is that managing large projects is an extremely complex job. In such projects there are many stakeholders and very many unpredictable and unforeseeable factors. Anyone who is able to manage such a complex set of links, individuals and interests and achieve success has attained something really great. I also see a great opportunity for the future. Mastering complex processes can provide us with a competitive advantage which guarantees jobs and business in the future.

In order to lead a complex project, alongside technical know-how, it is also necessary to have knowledge of general management, legal matters, economics and financial systems, risk management, languages, culture, psychology and other specialist areas. Anyone who is able to master these complexities and achieve perfection in practice, has the abilities which enable us to be much better than everyone else. This is why it is important for us to have a lot of colleagues who are able to do that.



Joachim Fischer at a PM alumni conference

We are currently in the process of supporting the teaching of project management at universities. For example, at the Friedrich Alexander University in Erlangen. Project management should be part of the standard education of an engineer. There is a very high possibility that a student engineer will make his living by executing projects in the future as engineers usually perform their tasks in the form of projects. Therefore, project management is the standard management procedure for engineers.

What are the next steps, the next topics that you are going to tackle with PM@Siemens?

Dr. Schloss: We will be concentrating on internal Siemens projects, there is a great need for this and there are already active working groups in place. Then we will concentrate on the organisation in which the project leaders work. Up until now the focus has been on the project leaders themselves, now we are looking more closely at the organisation, such as the project leader's superiors. It concerns topics such as the Project Management Office (PMO), Multi-project Management, Project Portfolio Management, Project Controlling and Resource Management. Ultimately, we will dedicate a lot more time to the lead and opportunity development management phase of projects, the integration of sales. This is because the largest part of project risk is still based on the acquisition phase.

And of course we also have a lot of ideas for the next version of our handbook!

“It was particularly important, that we first of all showed the organisation its improvement potential.”

There is still one important question: What do you consider to be the key success factors, the lessons learned, that you have picked up from your work with PM@Siemens?

Fischer: It was certainly very important that we first of all showed the organisation its improvement potential. We really only made a breakthrough with PM@Siemens when we had the facts, figures and data from the project business and could show how much money we lose in this area.

Dr. Schloss: It was just as important to stay on course. We have a clear target, which is to improve our Risk Management, Personnel and Resource Management and, above all, the results. This is still our current aim. Everyone has always had a part to play, including the managing board. Every board member of Siemens AG is familiar with PM@Siemens and supports the project.

Fischer: Yes, management attention has always been very important. In the initial phase each coordinator from the business units was assigned a board member from this unit. The board representatives were all present at the bimonthly discussions and often presented the topics to the managing board. This then created strong identification with the project.

Dr. Schloss: We have always held aloft the “PM@Siemens” brand. We also have our handbook, which everyone is aware of and which has a high level of brand recognition.

One key success factor for me is also that we didn’t tell those involved what they should do: instead we explained that we are a community of people who all have a part to play and who have created PM@Siemens.

Fischer: And, of course, you also need to have a knack for the right topics and be able to pull the right levers. We must also mention the individual PM@Siemens coordinators in the sectors and regional clusters, who are our disseminators and bring back feedback from the organisation. They were the driving forces through which we directed PM@Siemens.

Dr. Schloss, you once met the Project Directors Community, who came up with the idea for this book, in Hamburg.

Dr. Schloss: Yes, it was really great to meet them and to see that there are groups of project directors who regularly meet to exchange information. This shows that communication is important and also a necessity. The exchange of information and experiences can actually have an ef-

fect. It means you can find out what others are doing and how they are getting on. As the saying goes: a problem shared is a problem halved! I really had a great time with the community in Hamburg. In such moments I realise that there are PM@Siemens activities which I know absolutely nothing about. I'm really pleased about that because then I realise we have passed the point of no return, PM@Siemens now exists as an individual entity.

Dr. Hans-Jürgen Schloss launched PM@Siemens during his time as a managing board member of the Siemens Power Transmission and Distribution Group, while Joachim Fischer has remained loyal to quality management. During the discussion the satisfaction both men feel about the changes and the improvements made to the company was obvious. There is a real sense of enthusiasm about the changes which have been implemented and the visible improvement potential in the organisation and also about many things which are still to be achieved with PM@Siemens. But of course there is also great pride and satisfaction about what they have achieved, and they are still amazed by the magnitude of their success. Perhaps that is the key success factor: the PM@Siemens initiative has always been associated with a clear enjoyment of its complexity, while its improvements have served to create a great deal of satisfaction, making the apparently impossible possible.

Elisabeth Bittner

The Project Directors Community

The exchange of experience put into practice

Duisburg, December 2008 in the lecture hall of the old factory premises where Siemens produces compressors. A dozen colleagues from Duisburg, including project managers, general managers and commercial managers are eagerly awaiting the expected group of project directors from Erlangen and Munich – slightly awestruck, curious and eager to see what would happen next.

It was clear from the introductions how much experience gained in different countries, fields and projects had been brought together. However, it also showed how open and collegial their aspirations were: the project directors wanted to use their experience to help their colleagues, but they also wanted to learn something from them, about their business and projects.



The compressor factory in Duisburg; one of the locations in which the Project Directors Community was able to present its experience and know-how

After a short presentation of the Duisburg projects, the project directors divided everyone up into groups: the members the Duisburg projects and those from project organisation were questioned separately.

Does the project management of the projects meet the requirements of PM@Siemens? Will it be possible to achieve a good performance in the upcoming MPM Assessment? Can progress be identified in comparison with the assessment from a few years ago? Does the organisation offer adequate and thorough support to project management?

The project directors were able to get an idea of project management in Duisburg during interviews lasting several hours with those responsible for the projects and the organisation, taking into account all relevant phases of the project, from acquisition and the complete execution of the project to its completion.

When the teams got together again later that afternoon and reported on their impressions and conclusions of the day it became clear that the Duisburg employees were in good shape as far as project management was concerned, in some areas they were even achieving best practice in the company. However, the weak spots in project management and project organisation also became transparent; this made it clear where risks and opportunities could be found. These areas could now be tackled by the Duisburg team.

We had all gained something by the end of the day, it was a classic win-win situation. The Duisburg project leaders appreciated consultation “on equal terms” as well as the recognition and validation of experienced colleagues and assessors. The project directors also learned a lot about the projects carried out by the colleagues from Duisburg and were able to pick up examples of best practice for tools, processes and methods, in order to introduce and employ them in their own projects.

But what, and especially who, was behind the mysterious “Project Directors Community”?

The community is a group of project directors, experienced project leaders and key individuals in project management at Siemens, who joined together in 2003/2004 during the first PM1 Learning Program at Siemens AG, an advanced training program for project directors.

The initial spark

I can still remember the extremely charged atmosphere during the first part of the learning program. Tension was felt by all sides, the room was filled with the unusually high energy of the participants and organisers. The various stakeholders also had exceptionally high expectations mixed with a certain nervousness, as is often the case during premieres.

At that time (2003/2004) the PM1 Learning Program (PM1 for short) was a first for all participants, for the company, the budding project directors, who participated in this program, and for the trainers, who designed the program, it was now all about putting the theory into practice.

I “just” had the task of arranging the organisational process, the infrastructure and logistics, and to provide assistance to the trainers and participants. However, it was precisely this role which provided me with the opportunity, as an observer, to be a witness to this unique constellation and the “big bang” moment of the community.

It goes without saying that the participants were asked about their expectations which were evaluated well in advance and, of course, experienced large-scale project leaders, personnel advisors, general managers, board representatives and management consultants were involved in the development and preparation of the learning program. Experiences, requirements and solutions were gathered and evaluated from many different perspectives. But ultimately, we were all faced with a new task, a new challenge or a new role during the first meeting of the PM1 group. Of course, beneath theoretical aspects, which were recorded and included in the concepts, everyone had their own unique ideas and expectations, which first came to light here.

It was on the afternoon of the second day that the “bang” occurred, when one of the project directors literally banged his fist on the table and questioned the entire set up. In this moment all of the tension was released and it left behind, as it later transpired, a salutary shock amongst all of the participants. In this moment of crisis, of challenging the event, all of the pent up energy was released, which resulted in the formation of the community and which has carried us forward as a group ever since.

The big bang ...

**... from the perspective of Magdalene Kuehnel,
head of the trainer team**

At 2:50 pm one of the participants raised his hand and reminded the trainers that a different subject was supposed to begin at 2:30 pm and that they were not at all happy with the program and its order of events. They had paid a lot of money and expected a better performance from the trainers and less active input from the seminar participants ... and furthermore, the topics did not correspond to their level.

Agreement among the seminar colleagues.

Break in the seminar, meeting of the trainers

The trainer team decided to change things around:

- No further input in today's session – as requested by the participants.
- Raise the level of demands even higher – top level entrepreneurship also offered in the seminar program.
- Offer specialist content to top business school level standard

The seminar resumed: the trainer team informed the participants of the changes and asked them to cooperate so that this program would form an excellent basis for the future and they would be able to achieve a great deal themselves.

The spell was broken.

The participants took joint responsibility and in return they received a promise from the trainers that the agreed specialist subjects would be at the highest possible theoretical and practical level and correspond to the desired challenge.

That was the start of the Project Directors Community!

It was clear to us trainers that the participants stay together, if we are good moderators and don't make mistakes – something which is a huge challenge for us due to the demanding group.

Team building

This group very quickly reached the second phase of team building: Forming after half a day, storming also on the first day. Norming from the second day and performing from the second of a total of five training modules.

In the following modules of the learning program we succeeded in increasing our expertise and helping the group grow into a strong, trusting community.

We had so much fun despite all our efforts that half way through training we were already thinking about how it could continue after the seminar.

Give and take

Ultimately, a solution was discussed and agreed which was acceptable to all concerned, according to the principle of “give and take”: the trainer team raised the material requirements and standards of the learning program, improved the concept and ensured a more practical approach. In return the trainers called for more committed participation from the

participants and active input into the program, they should introduce their own experiences and deal critically with their own role and responsibility as project directors, instead of just passively following the program. Gradually a close knit team was created, based on give and take, supply and demand, enjoyment and hard work. A healthy basis for highly trusting and intensive collaboration in the group, producing a long and sustainable effect.

People with rough edges

One thing that we did underestimate in the run up to the learning program was that although we had the project management elite sitting in front of us, respectfully referring to them as “directors”, speaking to them in English, even though we were all German speakers – in the end they were “just” people, strong personalities with rough edges, as opposed to well-polished, slick managers. For me that was the main attraction of working with project managers. Despite or perhaps because of the enormous responsibility and the high risks which they have to cope with every day, they are down-to-earth, pragmatic people with a thirst for adventure and a pioneer spirit. Entrepreneurs who appreciate the whole range of project requirements, who work in the same way in portakabins as they do in the meeting rooms of luxurious hotels and who can communicate just as well with a worker on a building site as with a member of the board of directors or a government representative.



Elisabeth Bittner presenting a community event