

## Chapter Three

### Being the Project Manager of Your Life

#### Major Chapter Topics

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- **Project Management**  
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- **Project Process, System and Risk Mitigation/Management**  
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Systems Management  
Risk Management
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Supporting Project Management with a Balanced Scorecard  
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## Being the Project Manager of Your Life

### Personal Life Trajectory

Figure 3-1 was introduced in earlier chapters. Here again it envisions the fullness of our lifetime social development journey – our growth and development, the choices we may have made, and the restrictions and opportunities we have randomly encountered. What is shown is that all through our respective adult life spans each of us is presented with, and experience, direct and indirect stimuli that influence both our near and longer term development and capabilities. The rate of our maturation e.g. changes in our growth trajectory, may range from minimal to significant at any point along our pathway – but we are always moving forward and upward.

There are three widely recognized life transition stages in which personal issues have been well studied and warrant extra attention. These three transition points involve special life management challenges. However, we do have more knowledge and opportunities today than ever before for using the concepts, social practices and communications technologies addressed in this handbook. The challenge for you, the project manager of your own life, is to recognize that only you can conquer the inevitable transitions and bend the growth curves to optimize your personal life experience and accomplishments. When and how that happens is up to you.

**[Author's Note:** Figure 3-1 has probably been experienced by many of our readers already, however, few have ever witnessed the trends in advance nor understood the power of knowledge and choice that is now before you. You are the project manager of your life. You can achieve your lifetime goals by working towards them systematically. You can bend your thinking, learning, knowing, leading and achieving curve upward and surge forth with greater purpose and energy whenever you take command of your rate of development.]

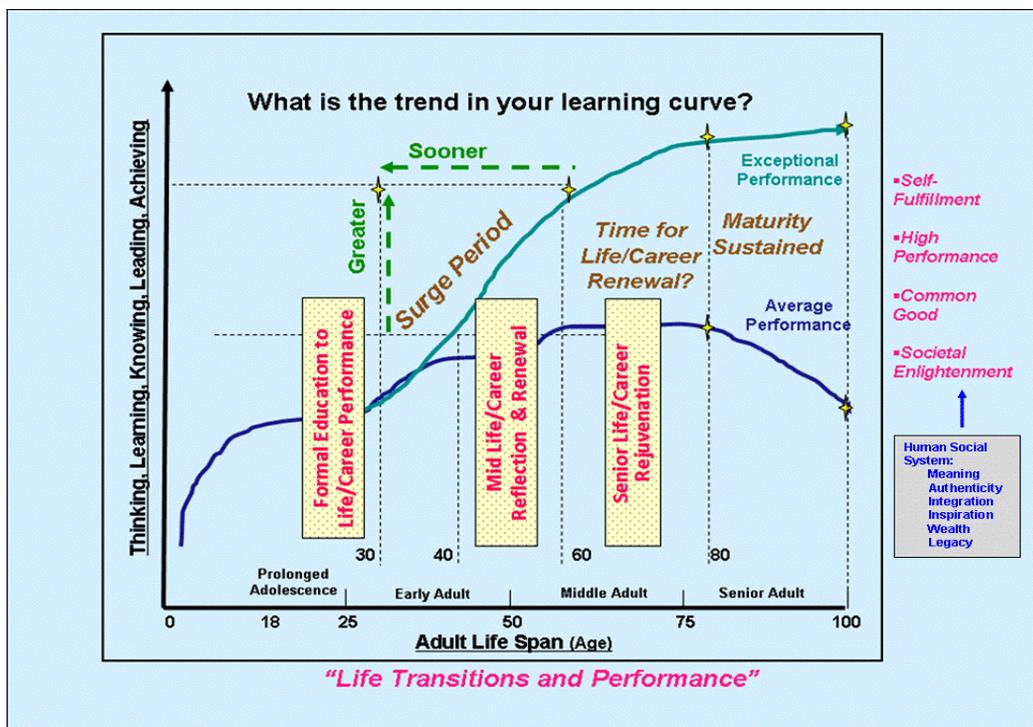


Figure 3-1

### Project Management

The business management function known as project management has grown exponentially over the last twenty-five years. While its purpose and activities were fundamental for management of organizational improvement initiatives prior to 1990, the advent of the *organizational quality management* movement at that time and the popularity of *business process reengineering* and *technology innovation* methodologies made project management a core skill of business leaders and consultants.

As greater emphasis on organizational efficiency and effectiveness became a mantra for future organizational success after 2000, project management knowledge and skills were essential for *organizational learning*, *knowledge management*, *enterprise engineering* and all manner of organizational improvement programs.

Leadership in defining and codifying the project management discipline came from the U.S. Defense Department, large private sector industrial firms, and private associations such as the Project Management Institute that established the training and certification program entitled the Project Manager Professional (PMP). Today, many private and public sector organizations require that an employee or consultant be a certified PMP before being assigned to lead a major improvement project.

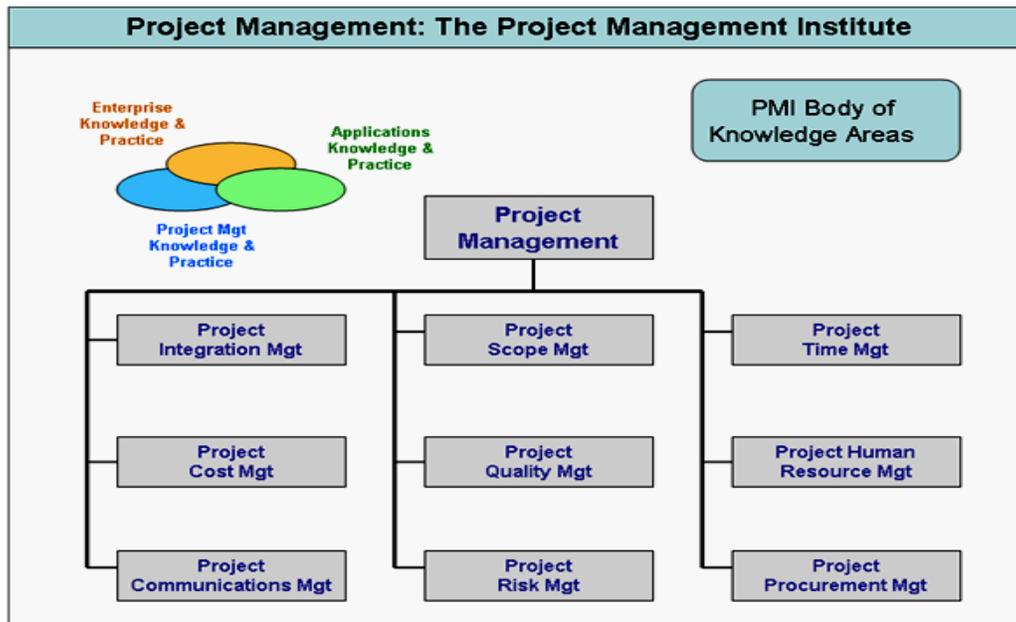


Figure 3-2

### Project Management Institute Body of Knowledge

The PMI Body of Knowledge shown in Figure 3-2 contains nine areas which require the project manager’s attention and skills at appropriate times during project execution:

1. Project Scope Management -- The process required to ensure that the project includes all the work required, and only the work required, to complete the project successfully.
2. Project Schedule (Time) Management – The process required to ensure timely completion of the project.
3. Project Cost Management – The process required to ensure that the project is completed within the approved budget.
4. Project Risk Management – The process concerned with identifying, analyzing and responding to project risk.
5. Project Quality Management – The process required to ensure that the project will satisfy the needs for which it was undertaken.
6. Project Integration Management – The process required to ensure that the various elements of the project are properly coordinated.
7. Project Human Resource Management – The process required to make the most effective use of the people involved with the project.
8. Project Communications Management – The process required to ensure timely and appropriate generation, collection, dissemination, storage and ultimate disposition of project information.

9. Project Procurement Management -- The process required to acquire goods and services from outside the performing organization.

### Role of the Project Manager

Project management is the selection and systematic application of knowledge, skills, tools and technologies to achieve a planned objective. And, project management requires the sequential implementation of five work process phases: initiation, planning, executing, controlling and closing. The selected *project manager* is responsible for the overall integration and completion of all activities leading to project success. Three important tasks in managing projects are:

1. Define and *scope* the desired outcome or objective.
2. Establish time allotments and a *schedule* to accomplish all the activities that need to be addressed.
3. Estimate the *cost* and budget required to perform all the activities as they are scheduled to occur.

Together, these challenges are termed the “triple constraint” of project management. Two additional functions vital in keeping the project on-track are:

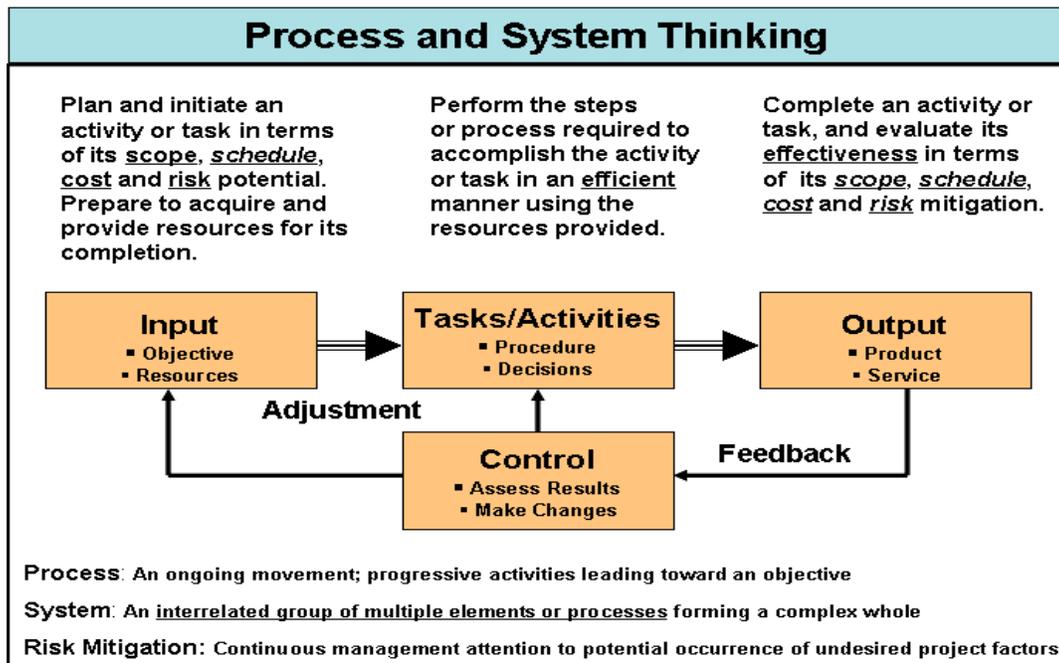


Figure 3-3

4. Be prepared for project changes. Some changes occur due to *unanticipated constraints* that need to be considered as the project proceeds, and other changes which result from *new project requirements* the project manager must incorporate into the original objective.

5. Conduct *risk* assessments at major decision points as the project proceeds in order to maintain triple constraint balance among *scope*, *schedule* and *cost*.

**[Author’s Note:** Notwithstanding the organization or business emphasis traditionally used to teach and employ project management knowledge and skills, this methodology is now recognized as having broader application to any sizable social system improvement initiative whether in business, personal life or community improvement effort.]

### Project Process, System and Risk Mitigation/Management

Project managers must have a foundational understanding of *systems thinking*, *process management* and *risk mitigation/management* (Figure 3-3). Even though projects are defined as having a specific beginning and end, it should be known that the project management methodology derives its features from the seminal concepts of

recognizing the interdependent activities (systems thinking and analysis) and sequencing productive activities from an initial state to a final state (process planning and analysis).

### Process Management

All human experience is ultimately involved with obtaining our needs, wants and desires from activities in our networks and relationships – and, those activities are mostly dependent on someone else deciding to provide a product or service by engaging appropriate processes and resources to do so. Virtually nothing of which we can conceive is at its very beginning – all human activity and products result from others' initiation, influence, work or social action. Functionally, the structure of process management includes a sequence of *activities* that are enabled through the use of *inputs* and work together to provide *outputs* that are desired or required by a person, organization or community. A *control* function is essential for corrective feedback to either the *input* or *activity* functions.

Once we understand the process-based environment in which we exist, we can learn how to work and succeed within recognizable boundaries. To make processes work efficiently, monitoring and control functions act to correct and improve what we plan to achieve. Earth itself is alive with predictable changes and events, and we may need to reflect on the damage we ourselves are causing.

### System Management

A companion relationship to process management is system management in which smaller tasks support activities that are connected to form a process, and then multiple processes are grouped to enable more complex functions (e.g. humans, schools, railroads) to operate. The resulting interdependent functions are then able to form governments and societies to meet our human needs. From the smallest to the largest animal, plant and physical systems known, we can observe a social system-of-systems performing, evolving and even transforming itself if we take the time to observe the transitions and transformations.

Project management, consisting of process and system consideration, has been introduced to illustrate how essential they can be in organizing, planning, implementing, controlling enterprise improvement projects. These methodologies provide project team members with a purpose and objectives, sequential activities and resources, formal decision-making events, knowledge and skill building opportunities, and feedback and correction methods to manage necessary change in a timely manner.

### Risk Mitigation and Management

Project management also necessitates assessing, mitigating and/or correcting risks (negative events or influences) that can impact the ability of the project team to stay within the project scope, cost or schedule while pursuing the desired outcome. Unanticipated problems have the potential to slow or prevent project operations and successful completion.

The primary areas for conducting risk assessment are the *identification* of potential or present risk factors, and the *probability* of the risk factor actually occurring. For example, if an unplanned change in the project scope appears on the horizon it is necessary to also assess the probability that the potential change will actually occur. Similar assessments should be considered for project cost/budget and project pace/schedule. There are two ways to combat risk, *mitigation* and *management*. The former requires the establishment of measures that deflect and reduce the likelihood of the risk creating a project problem. The latter employs direct action to prevent or eliminate the risk as it occurs.

**[Author's Note:** What is important for the purpose of *lifetime project management* is that these “organizational methodologies” are equally effective when used by individuals for planning, implementing and motivating themselves toward continuous personal and professional development.]

## **Personal Life Project Management**

### **1. Lifetime Scheduling of Improvement Initiatives**

An approach for scheduling and taking improvement action along one's own life cycle is notionally illustrated in Figure 3-4. Each person can choose appropriate times during their respective lives to pause, conduct a review of their progress, initiate a defined set of improvement actions and proceed to implement their learning, and commit to productive change and better results. Each *Life Project Task/Activity* represents an initiative such as: sign up for significant new education and skill building, change jobs to enhance one's career, move to a new location to gain for better experience, decide to move from an academic career to business or vice versa, or decide to retire early to pursue emerging interests. In each situation, the context and/or content of the person's life or career could be noted and recorded for later comparison.

This suggestion may be a challenge for people less experienced or less proactive people in two ways: (a) most people don't maintain the same energy for personal and career development throughout their lifetimes, and (b) quite often people fail to recognize the accretion of personal change already in their lives, or the disruptive change resulting from competitive sources outside their own control. Paying attention to social, economic, political and technological change is essential for continued personal, career and community development in all sectors of our social system of systems.

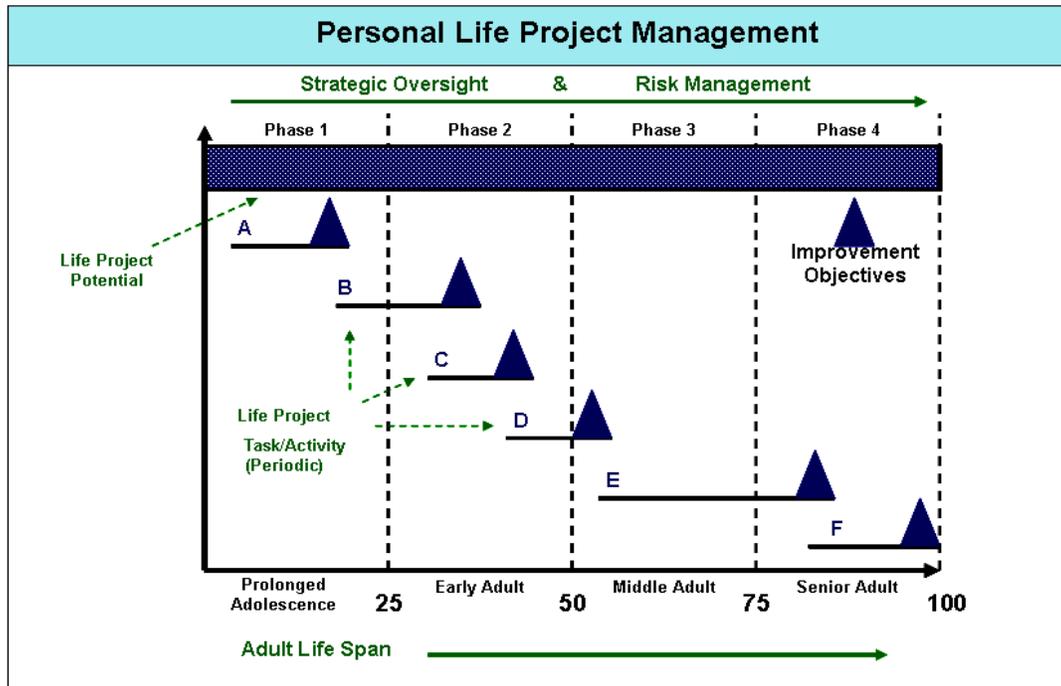


Figure 3-4

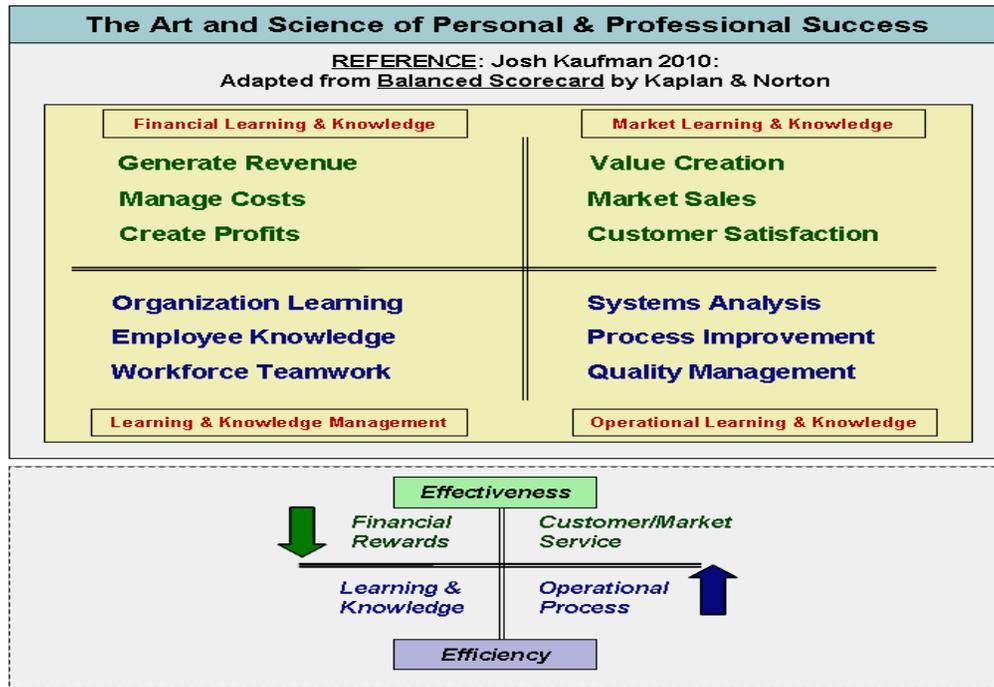
## 2. Supporting Project Management with a Balanced Scorecard

In their book *The Balanced Scorecard: Translating Strategy into Action* (1996), Robert Kaplan and David Norton presented a management system that enables organizations to clarify their visions and strategies and to establish a measurement system to evaluate organizational performance in the pursuit of those objectives. Kaplan and Norton state that: "The balanced scorecard retains traditional financial measures. But financial measures tell the story of past events, and were only an adequate story for industrial age companies for which investments in long-term capabilities and customer relationships were not as critical for success. These financial measures are inadequate, however, for guiding and evaluating the journey that information age companies must make to create future value through investment in customers, suppliers, employees, processes, technology, and innovation."

The Kaplan and Norton Balanced Scorecard uses a four perspective approach for assessing organizational performance: (1) Learning and Growth, (2) Business Process, (3) Customer Satisfaction, and (4) Financial Results. In each, stated objectives, measures, targets, and initiatives are identified and assessed as to their contribution to accomplishment of the organization's vision and strategy. The four perspectives are defined as:

1. (Employee) Learning and Growth. This perspective focuses is on the necessity for "knowledge workers" to be in a continuous learning mode. Learning is more than just training, and includes mentors and tutors, the availability of communications systems, and technological tools.
2. Business (Operational) Process. This perspective refers to internal business processes. Metrics based on this perspective allow the managers to know how well their business is running. Two kinds of processes may be identified: (a) mission-oriented processes, and (b) support processes.
3. Customer (Market Learning). This perspective emphasizes the important of customer satisfaction. Customers should be analyzed in terms of the kinds of customers and the kinds of processes that are used to service them.
4. Financial (Revenue and Cost). This perspective continues the traditional emphasis on revenue and profit, but adds cost-benefit data and risk assessment to the criteria.

**[Author's Note:** The balanced scorecard approach has gained enormous popularity in the business community. Figure 3-5 presents a further illumination of the balanced scorecard concept as adapted from *The Personal MBA: Master of the Art of Business* by Josh Kaufman, 2010.]



**Figure 3-5**

Kaufman argues in his *The Personal MBA* that the 2X2 matrix represents the highest level of executive management responsibility – and is therefore the highest level of guidance to which employees should aspire in assisting their firm's success. Given that perspective, the American Learnership adaptation in this Handbook is that the *project management* skill set and the *balanced scorecard* performance assessment are equally appropriate and effective when used together in a social system-of-systems (personal, organizational, community, societal) framework. With minor modification in description, the categories for management and performance assessment are:

- a. **Learning and Knowledge Management** (Internal Focus) – What new learning and knowledge building should you pursue to increase both your personal and professional performance? [Efficiency]
- b. **Operational Learning & Knowledge** (Internal Focus) – How can you improve the productivity of your personal and professional activities to save time and money? [Efficiency]
- c. **Market Learning & Knowledge** (External Focus) – How can you better serve your needs and those of customers and clients in the various marketplaces? [Effectiveness]
- d. **Financial Learning & Knowledge** (External Focus) – What results have you achieved to increase your income and reduce your cost of operations in the social system domains (personal, organization, community)? [Effectiveness]

### 3. Wealth and Financial Security Using an Integrated Balance Scorecard

The graphic at Figure 3-6 represents the American Learnership interpretation of the Kaplan and Norton model as a *Learnership Integrated Balanced Scorecard*. It begins with business *high performance* (HP) domain in the center, personal *self-fulfillment* (SF) domain on the left, and the community *common good* (CG) domain on the right. Simultaneously, it interlinks the balanced scorecard financial, customer, internal processes and knowledge and learning assessment factors to communicate a social system-of-systems framework. The result is an ambitious conceptualization of how future project managers, business leaders and social system architects can reflect and collaborate on interdisciplinary societal improvement and development in terms of the *planned and achieved financial management outcomes* for participants in all societal domains.

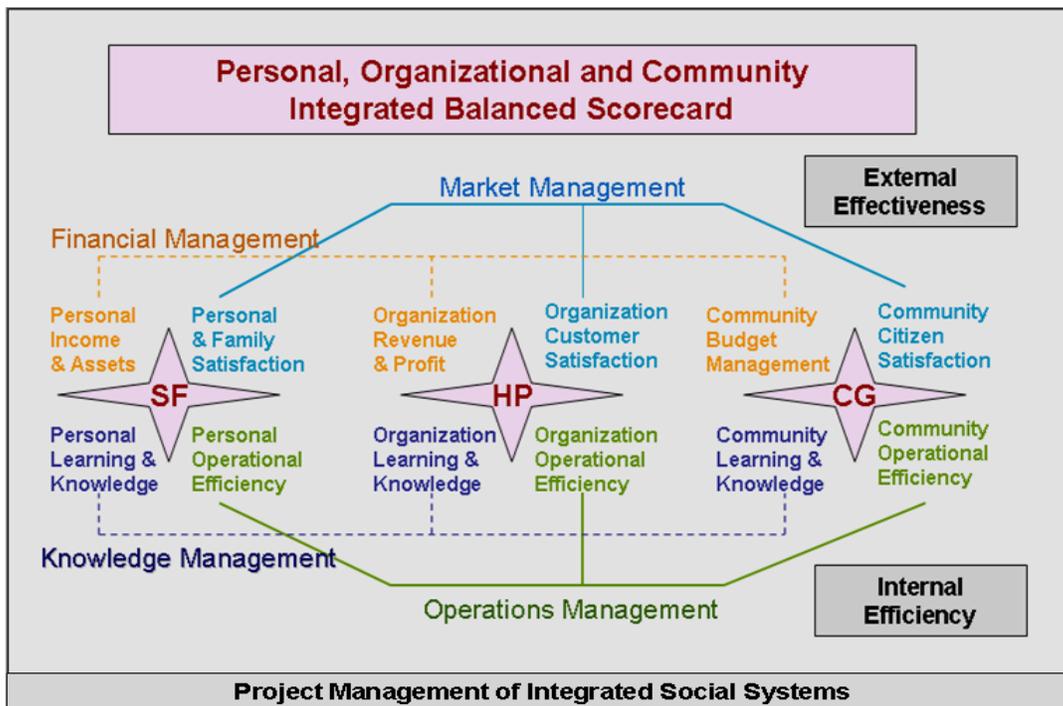


Figure 3-6

The efficiency and effectiveness of all domains can be best determined by reviewing systems performance in a counter-clockwise manner starting with the Knowledge Management domain, proceeding through the Operations Management and the Market Management domains, and ending at the Financial Management results domain:

- a. Personal Self-Fulfillment – From this viewpoint, an assessment that reviews an individual’s personal level of learning and knowledge development, followed by how that development enables personal (family) operational efficiency, followed by the effectiveness in achieving personal (family) satisfaction, results in the near and longer-term accumulation of personal (family) income and capital assets. This process may be termed *personal (family) wealth and financial security* which is the result continuous review and learning in the other quadrants and is discussed in detail later in Chapter Ten.
- b. Organization High Performance – From this viewpoint, an assessment that reviews an organization’s level of learning and knowledge development, followed by how that development enables organizational operational efficiency, followed by the effectiveness in achieving organization market satisfaction, results in the near and longer-term accumulation of organization income and capital assets. This process may be termed *organization (business) wealth and financial security* which is the result continuous review and learning in the other quadrants and is discussed later in detail in Chapter Eleven.
- c. Community Common Good -- From this viewpoint, an assessment that reviews a community’s level of learning and knowledge development, followed by how that development enables community operational efficiency, followed by the effectiveness in achieving community citizen satisfaction, results in the near and longer-term accumulation of community income and capital assets. This process may be termed *community wealth and financial security* which is the result continuous review and learning in the other quadrants and is discussed later in detail in Chapter Twelve.

**[Author’s Note:** Figure 3-7 has been modified to illustrate the wealth and financial security aspect of assessing the Meaning of our Lives as we continue through this Mindset Handbook.]

#### 4. Lifetime Tracking of Improvement Initiatives

As the sequence of *Life Project Tasks/Activities* back in Figure 3-4 are accomplished, it is helpful to record the process and results of each improvement initiative as a milestone of that activity -- and as an information source for future reference. To be consistent with the *Learnership Methodology* advocated in this handbook, the three *Personal, Organization* and *Community* domains should be focused on moving forward to achieve their respective goals. A three step analytical process that may be useful in organizing improvement efforts are: *Assess (previous) Progress, Plan Improvement, and*

Take action. For each of the three domains four categories of *improvement initiatives* are recommended beginning with your *Personal* domain followed by your *Organization* domain and *Community* domain.

## Personal Life Project Management

Project Improvement Initiative, Date: \_\_\_\_\_

← Personal Improvement Scorecard →

<b>Project Task/Activity</b>	<b><u>Knowledge Management</u></b>	<b><u>Operations Management</u></b>	<b><u>Market Management</u></b>	<b><u>Financial Management</u></b>	<b>Goals to Achieve</b>
<b>Personal</b> Health, Ability, Character	(Assess Progress, Plan Improvement, Take Action)	<b>Self-Fulfillment</b>			
<b>Organization</b> Direction, Operations, Performance	(Assess Progress, Plan Improvement, Take Action)	<b>High Performance</b>			
<b>Community</b> Education, Government, Business	(Assess Progress, Plan Improvement, Take Action)	<b>Common Good</b>			

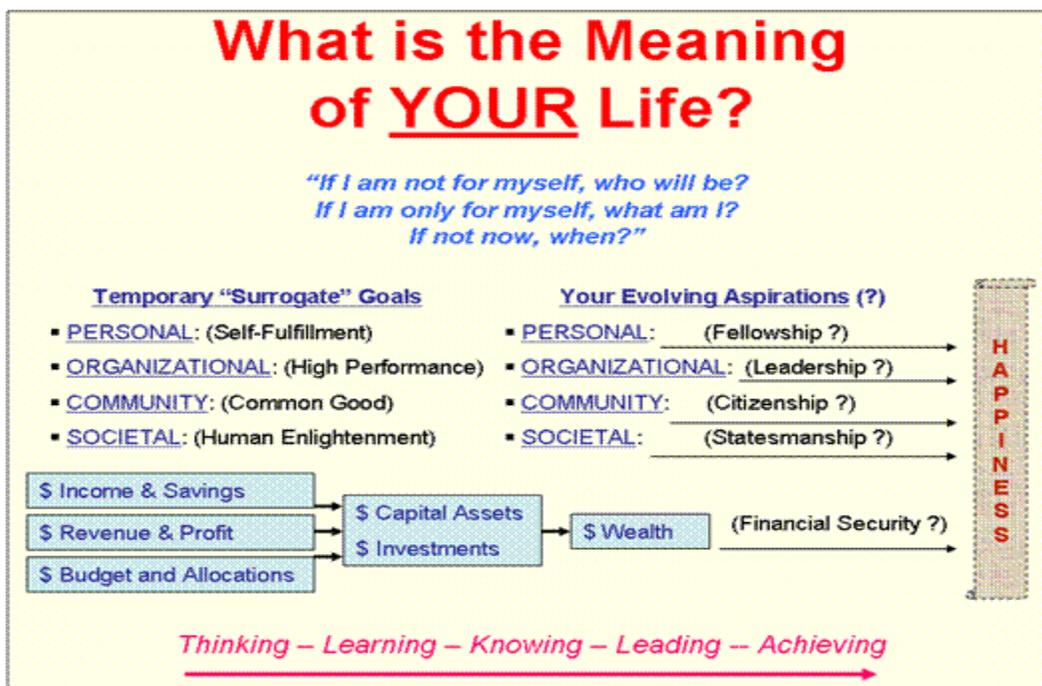
**Table 3-1**

To reiterate, Table 3-1 depicts three major *learnership domains* (personal, organization, and community) for systematically planning, implementing, improving, controlling and achieving personal knowledge, skills and personal progress. This method illustrates that the three major domains, while separately defined, may be treated as an *integral personal development responsibility*. That is, the three domains operating synchronously for one's lifetime could optimize lifelong learning, the assimilation of changes, and the accomplishment of life and career objectives. Notionally, the project could begin early in one's adult life wherein project *scope, schedule, cost* and *risk* could be formally recorded and then later reviewed and updated as significant life and career transitions compel reflection and renewal.

**[Author's Note:** The learning point here is not prescriptive such that everyone should implement this personal project management technique in a burdensome way. And yet, using this approach once, twice or three times during major life and career transitions might encourage a higher level of personal cognitive and emotional development. As a minimum, an assessment of personal progress and planning for future growth and development are advised at three main periods of transition: (1) the formal education to adult career transition, (2) the mid-life/career transition and (3) the senior/retirement transition.]

### Questions on the Meaning of Your Life

*Being the Project Manager of Your Life* is both an opportunity and a responsibility. It is an opportunity in that it permits us to pursue our personal and professional development in an orderly, proactive and constant learning manner. It is a responsibility because many very successful people already use the similar practices discussed in this section, and they are outpacing their competitors in the life, work and community marketplaces. Accordingly, Figure 3-7 has been expanded to include *wealth and financial security across all social system domains*. While this aspect of our lives is not the only activity that makes living worthwhile and gives us happiness, it is fundamental that our knowledge, skills, abilities and accomplishments continue to improve so we experience a satisfactory rate of recognition and financial success.



**Figure 3-7**

**[Author's Note:** It's the experience of this author that individuals trained in becoming Project Managers in their organizations have an affinity for focusing their knowledge and skills for operational improvement in all areas of their lives. The discipline of project management tends to reinforce the notion that having the will to persist against resistance builds the confidence that purposeful effort leads to better results.]

How do these surrogate goals work for you right now? (Figure 3-7)

Can you venture a guess as to what might evolve as you continue to reflect and learn?

Should your wealth and financial security goals and aspirations be included as areas for improvement?

**Implications for Integral Learning and Knowledge Management.** This chapter illustrates that Personal Life Project Management is a methodology that encompasses both the qualitative and quantitative aspects of human aspirations and financial security. It also cautions that a reasonable person would recognize that a thoughtful, balanced and holistic approach in setting goals and taking action is advisable. Because the quality and quantity of our learning evolves – developed over a lifetime of experience – major changes can occur as new knowledge replaces that which no longer serves our needs and interests. And, as new learning and knowledge becomes influential, our goals will require modification within our already established mindsets and beliefs. An important feature that has been added in this chapter is that personal, organization, and community development and financial security is inextricably dependent on our willingness and ability to continuously learn and construct knowledge relevant to operational efficiency and external effectiveness within our social systems domains.

**Personal Reflection.** This topic appears at the end of each chapter and is meant to serve two purposes: (a) be a reader's guide to main points and "takeaways," and (b) to encourage everyone to take a moment to engage their mental cognition and intuition on what the chapter means to them – especially at this time in their lives. Questions for chapter reflection follow immediately below; and for those readers inclined to maintain a self-assessment, your thoughts may be recorded in your *American Learnership for Life, Work, Wealth, Health and Legacy Success* which is at Appendix B.

### Questions for Discussion

1. Can you give an example of a potential life or career management situation in which project management might be useful?
2. Have you studied business process project management in the past? If so, how applicable is life project management to your personal development?
3. What project management aspect or function have you found to be most challenging to accomplish?

## Insights, Commitments and Skills

If you plan to participate in the *American Learnership for Life, Work, Wealth, Health and Legacy Success* self-development program, it is suggested you record your Insights, commitments and skills to be developed here in this chapter, and again in Appendix B:

My learning in terms of new insights, changing priorities, new commitments or skills I want to acquire:

1. Insights (Example): Remind myself that ...
2. Commitments (Example): Continue to ask myself ...
3. Skills (Example): Apply my knowledge and skills to ...

## Conclusion

A Section One review of this Handbook:

Chapter 1, An Introduction to American Learnership, provided an overarching summary of the foundational concepts and insights that make “Learnership” a distinctive trademark. The principles, graphics and practices advocated are meant to stretch readers’ thinking and suggest new approaches for becoming successful – all within a logical social system-of-systems framework. Two foundational documents for this guidebook are the Learnership Integrated Systems Architecture (LISA) and the list of Twenty-Five Learnership Practitioner Characteristics.

Chapter 2, Discovering the Meaning of Your Life, offered a comprehensive method for reflection, learning and identification of one’s own life objectives to create a sense of purpose and motivation. The learnership social system domains and guideline objectives used to organize this task were (a) Personal self-fulfillment, (b) Organization high performance, (c) Community common good, and (d) Societal human enlightenment. When pursued in an integrated manner, the learner is assured of achieving personal development and optimizing their life satisfaction.

Chapter 3, Being the Project Manager of Your Life, provided an introduction to a well-regarded business management skill with a description of how that tool could be used equally well in managing one’s learning and life trajectory. The project management methodology adds value due to its use of process management and systems thinking techniques that require employing discrete steps in working towards a desired objective. Periodic review of project challenges and the updating of necessary project changes keeps the project (one’s life) moving forward toward desired objectives at a reasoned pace.

The next chapter (4), Crafting Your Authentic Personal and Professional Brand, describes how everyone may responsibly learn more about themselves, and then use that learning to chart a course of action that enables their purpose and capabilities to be understood and valued by others in their network and field of business.

**[Author’s Note:** Readers wishing to develop and publish their own *authentic personal and professional brand* e-book can obtain assistance from this handbook author. An example of how that document might look when completed is included in the following chapter and at *Appendix C.*]