



# *Implementation of Strategic Initiatives via Project Management Methodologies*

*A case study of a Professional Services Multinational Organisation in Ireland*

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## **ABSTRACT**

This research paper explores the use of project management methodologies in implementing strategic initiatives, asking the question “What impacts do neo-classical project management methodologies have on the implementation of strategic initiatives in multinational organisations?”. A review of recent literature indicates the importance of aligning Strategic Management with Project Management. For companies to achieve their strategic goals the research shows that any project undertaken must lead to achieving those same goals (Longman et al, 2004)(Cooke, 2017). Where they are misaligned work is performed that is either irrelevant or deters from the strategic objectives. We also infer from the research that a rigorous management structure is needed to implement these projects (Almeida et al, 2019). However, much of the research does not evaluate how effective the use of project management is in a highly dynamic environment where the rates of change are increasing (Zavyalova, 2020). As such, this paper also examines the relationship between project management and strategic initiatives including the perceptions of decision makers and the decision-making criteria involved in how to approach them.

The report follows a case study of a Finance Strategic Initiatives function within a multinational organisation operating in Ireland and is underpinned by qualitative research of project and strategic management literature review, semi-structured interviews and observation using non-probabilistic purposive sampling techniques. 10 participants performing Project Management or Strategic Management roles ranging from middle to upper management levels within the professional services industry in Ireland, with experience extending from under 10 to 30+ years formed the primary research group (*App.1*).

The research finds that organisations that have not aligned their project management approaches with their strategic initiatives do not achieve their objectives (APM, 2015)(PMI, 2015)(KPMG, 2010). It also identifies that perceptions of decision-makers and members in these roles play a significant part in how they are approached and implemented, with a significant disparity between perception and practice. Misalignment occurs caused by misunderstanding of the relationship between the strategic initiative and right project management fit. This is due to not leveraging the expertise of Project Managers in the decision process, lack of clear guidance and enforcement of formal processes, and little to no emphasis on workforce management planning related to skilled resources and training requirements aligned to the project management and strategic initiative’s needs.

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## **CHAPTER ONE – INTRODUCTION**

Given the size and spread of multinational organisations, systems are put in place to organise the management of its activities. Some of the core activities include clear governance, set of aims in the form of a charter and an agreed vision (PMI, 2020). Once those strategic objectives are outlined, it is then the responsibility of management to action. Research tells us that by using project management, the strategic goals are split into various projects allowing the effective management and achievement of said goals. It encourages greater ownership and accountability when broken down into smaller modular and more manageable sizes, and there is clear guidance on responsibility for driving to completion within agreed timeframe and budget (Gino et al, 2011).

A question often neglected in research but is being increasingly brought to the fore in practice is how effective neo-classical project management is in tackling a changing environment and its ability to facilitate the implementation of the simultaneous change in company goals. The following report takes this background and approaches it from a case study perspective of a multinational organisation operating within the Professional Services industry in Ireland. For confidentiality reasons the organisation will be referred to as Company Z.

### ***Industry Landscape:***

The Professional Services industry includes the likes of Deloitte, KPMG, and Accenture. It is an industry currently undergoing tremendous demand for change from its Clients due to COVID-19 and Globalisation. Remote working, value focused client deals and operating costs have caused the industry to look inward at how they might turn these challenges into opportunities. Current trends for 2021 identify Digital Transformation, Artificial Intelligence, New ways of working, Pricing for Value Models and Client Management as key strategic opportunities (Krupa 2021, Mansinghka & Mohan 2021, Rubin 2021). To act on this professional services companies will need to have rigorous management in place to implement the strategic initiatives.

### ***Company Backgrounds:***

Due to confidentiality reasons the company chosen for this case study is anonymous; as such, the following biographies provide insight into the current main players in this Industry and this case study is applied to one of these players.



### *Accenture*



Accenture PLC is an Irish based multi-national consulting and professional services organisation, led by CEO Julie Sweet. It operates in over 100 countries delivering multi capability services across all industries. They pride themselves on being at the forefront of change; by not only providing expertise to their clients on how to gain competitive advantage through strategy development but by applying it to themselves in how they operate internally (Accenture, 2021). The organisation has been providing strategy and consulting services for over 50 years with its group of over 500, 000 employees and is part of Fortunes 500 for just under 20 years while having long standing clients among Fortune 500 and 100 (Fortune, 2021). Last year’s revenues were published of over \$44Billion in 2020, showing steady increases year on year over the past five years (Statista, 2021)(FT, 2021)(Yahoo, 2021)(Accenture, 2021).

### *Deloitte*



Deloitte Touche Tohmatsu Ltd, founded in 1845, is a multinational professional services organisation operating in over 150 countries worldwide, with 334,800 employees, led by CEO Punit Renjen. They’re organisation’s purpose is “to make an impact that matters to our people, our clients, our community and our planet” (Deloitte, 2021). Aligned with this is their strategy to enable their clients to navigate the future through valuable insights and expertise provided by working in partnership to achieve mutual goals, delivering growth in a dynamic environment (Deloitte, 2021). Last year’s revenues were published of over \$47Billion as of end of 2020, showing steady increases year on year over the past five years (Statista, 2021)(Yahoo, 2021)(Deloitte, 2021).

### *KPMG*



KPMG founded in 1987, led by Chairman William Thomas, is an international professional services company providing audit, tax, and advisory services. It operates in 146 countries, collectively employing ~ 227,000 people across private, public, and not-for profit sectors (KPMG, 2021). KPMG seek to “inspire confidence and empower change in all they do”, “providing a new perspective on how to design and implement strategies that win in today’s market” (KPMG, 2021). Their strategy is centred on value, innovation, and customer satisfaction. Revenue for 2020 was



reported at \$29.22Billion USD down from the previous year (Statista, 2021)(Yahoo, 2021)(KPMG, 2021).

***Conclusion:***

Because of Company Z’s industry and purpose, it was chosen as a prime candidate to investigate the research question of “What impacts do neo-classical project management methodologies have on the implementation of strategic initiatives in multinational organisations?”. This question is critical to the success of professional services organisations in a time of uncertainty; where a requirement of looking to the future and how the organisational will get there is a must. Additionally, the researchers access to information and employees of the organisation was the crucial deciding element in choosing Company Z as the case study.

The following report seeks to outline and understand the current literature landscape on the topic of accepted approaches to Project Management, Strategic Management & Initiatives, and the integration of both. Based on the investigation into the current landscape the researcher describes the objective and purpose of the paper to understand the influencing factors of implementing strategic initiatives effectively. Next, further defining of the research question to be answered “ What impacts do neo-classical project management methodologies have on the implementation of strategic initiatives in multinational organisations?” with a set of sub-questions to achieve the objectives. Having defined the research question the research methodology is then developed, illustrating the qualitative approach aswell as data collection and analysis. The findings are subsequently analysed and discussed schematically through four key themes at a micro and macro level with the inclusion of recommendations and limitations for the case study.

## CHAPTER TWO - LITERATURE REVIEW

Cleland (1994) argues that to achieve the successful implementation of strategic initiatives projects and project management are a key component. To understand the relationship between project management and strategic initiatives and the impact project management has on strategic initiative implementation, the research highlights 3 themes of investigation: Current accepted approaches to project management; Concept of Strategic Management; and Integration Factors of Project Management and Strategic Initiatives. These themes allow the researcher to understand end to end the influencing factors of strategic initiative management and investigate their appropriate use in implementation.

### *Accepted Approaches to Project Management:*

A project is “ a temporary endeavour undertaken to create a unique product or service” (PMBOK, 2020). Project management is the application of tools, knowledge, and techniques to identify activities required to meet project objectives via three main schools of thought Traditional, Agile or Lean (PMBOK, 2020). Project Managers are given the responsibility of ensuring that projects deliver value as promised and are aligned with the objectives of the organisations Leaders through the Project Charter. They have the authority to act in the name of the Project Sponsor Executive or on behalf of the organisation. As such it is crucial for Project Managers to understand the relevant applicability of each methodology to their project and be skilled in implementing them. To determine which approach to apply one must understand the purpose of each whether the lifecycle is predictive, iterative, adaptive or hybrid. Consensus of authors states it is determined by the scope, cost, time, and stakeholders.

### *Predictive – Traditional / Waterfall*

This approach was designed to be used when all requirements are known upfront, there is little to no change in the environment and follow the linear methodology where each activity is performed one after the other (PMI, 2020) (Cruz et al, 2020)(Ahimbisibwe et al, 2015). The processes are grouped under five logical process groups (1) Initiation, (2) Planning, (3) Execution, (4) Monitoring and Controlling and (5) Close: to form a rigid structure of management throughout the project lifecycle (PMBOK, 2020).

✧ *Initiation* is the kick-off stage at the beginning of the project; project managers are assigned; scope is defined, and project charters are approved and signed off.

- ✦ *Planning* builds on Initiation by fleshing out more detailed documentation of how the project will be completed. Project documentation consists of the project plan, roadmap, scope/requirements details, schedule, work breakdown structure and risk log.
- ✦ *Execution* is a crucial element where a project team takes the documents that have been carefully curated and completes the work on what is described in those documents. Project Managers high level responsibility in this phase is to ensure everyone is aligned on deliverables in terms of timelines, requirements, and collaboration between workstreams and stakeholders
- ✦ *Monitoring and Controlling* enables the project Managers to carefully track progress and ensure alignment of activities with project and strategic goals through key performance indicators (KPIs). This is especially important when the environment changes and original decisions made are no longer suitable, or if activities are not meeting objectives and so course correction is needed. This phase is used to prevent delays, increased costs, and scope creep. It is important to note that this phase is implemented in tandem with the Execution phase.
- ✦ *Close* is the final phase of a predictive traditional project. All deliverables should be tested, signed off and handed over to operating teams for long term management. Project Teams develop hand over and process documentation, aswell as hold training sessions for the operations teams taking over. Additionally, sessions should be held with project teams to document reflective learnings on what did and did not go well or what could have been done differently. Reflective learnings or Lessons Learned should then be taken forward by current project teams and communicated to other teams so that the organisation is continuously learning and avoiding duplication of the same mistakes. Furthermore, closing a project finalises the effort and cost required versus the benefit which can then be used to estimate effort and costs for future similar projects, enabling better accuracy in planning.

As part of the lifecycle, there are ten knowledge management areas (1) Integration, (2) Scope, (3) Schedule, (4) Cost, (5) Quality, (6) Resource, (7) Communications, (8) Risk, (9) Procurement, (10) Stakeholder, each are mapped to one or more of the process groups (Fig.1. - PMI, 2020).

*“Implementation of Strategic Initiatives via Project Management Methodologies”*

<b>KNOWLEDGE MANAGEMENT AREA</b>	<b>DESCRIPTION</b>	<b>PROCESS GROUP</b>
Integration	Identify, define, combine, unify and coordinate processes and activities across process groups	All
Scope	All work required ONLY to complete project	Planning Monitoring and Controlling
Schedule	Manage timely completion of project	Planning Monitoring and Controlling
Cost	Planning, estimating, budgeting, financing, funding, managing, controlling project costs to complete within approved budget.	Planning Monitoring and Controlling
Quality	Identify and implement Organizational quality standards to meet stakeholder expectations	Planning Executing Monitoring and Controlling
Resource	Identify, acquire, manage resources people, technology, equipment, facilities etc. to complete project	Planning Executing Monitoring and Controlling
Communications	Creation, transferring, storing, management and disposal of relevant project information to achieve project activities and deliverables	Planning Executing Monitoring and Controlling
Risk	Planning, analysis, identification, mitigation, responsiveness to potential issues with completion of project activities.	Planning Executing Monitoring and Controlling
Procurement	Purchasing or acquiring products, services from outside team or vendor	Planning Executing Monitoring and Controlling
Stakeholder	Identify and implement management strategies for people, groups that are impacted or could impact the project, or are key decision makers.	Initiating Planning Executing Monitoring and Controlling

*Fig.1. - Knowledge Management Areas (PMBOK, 2020)*

Due to the linear approach of traditional or waterfall project management some critics argue it is not suitable for the changing environment of today’s industries as it is slow to adapt and allows little room for change without incurring high costs (Wysocki, 2014 B). From this project managers are looking toward more flexible methods of project management such as Agile to fill that gap and meet those needs.

*Adaptive - Agile*

This approach was originally designed for use of software development given the need for a model that allowed for continuous requirements gathering, changes to prototypes and iterative building and testing. The Agile Manifesto proposes four core values (Fig.2.) and twelve principles (Fig.3.) centred on a value driven life cycle managed via collaborative, self-disciplined, self-organising teams identifying, and meeting stakeholders needs (Agile Alliance, 2001) (Wysocki, 2014 A).

CORE VALUE	DESCRIPTION
Individuals and Interactions Over Processes and Tools	Place the people at the center of the project answering their needs primarily rather than being driven and focused by tools and process requirements, with people as secondary.
Working Software Over Comprehensive Documentation	Ensure products and services are delivered fit for purpose in a timely manner rather than documenting first and developing later. These should be done in tandem while not allowing documenting of processes to hold up delivery.
Customer Collaboration Over Contract Negotiation	Engage customer throughout development and aligning requirements instead of gathering strict requirements upfront with no engagement of client at later stages until delivery. Thus, allowing teams to deliver more value to customer and ensure deliverables are meeting expectations.
Responding to Change Over Following a Plan	Iterations are key, adding and testing features based on client feedback allowing greater adaptability to changing environments. Deliverables fit client need not the other way round.

*Fig.2. – Agile Core Values (Agile Alliance, 2001) (Wysocki, 2014 A)*

*“Implementation of Strategic Initiatives via Project Management Methodologies”*

PRINCIPLE	DESCRIPTION
Customer satisfaction through early and continuous software delivery	Working deliverables early and often
Accommodate changing requirements throughout the development process	Adaptability, avoid delays due to changing requirements
Frequent delivery of working software	Frequent and short sprints of completed deliverables
Collaboration between the business stakeholders and developers throughout the project	Better decisions and aligned stakeholders
Support, trust, and motivate the people involved	Motivated teams are higher performing
Enable face-to-face interactions	Critical and daily team relationships co-located where possible
Working software is the primary measure of progress	KPIs based on successful delivery
Agile processes to support a consistent development pace	Repeatable, consistent, and sustainable speed of delivery in sync with releases
Attention to technical detail and design enhances agility	Right skills with right designs to maintain quality and adapt to changes
Simplicity	Minimum Viable Product
Self-organizing teams encourage great architectures, requirements, and designs	Skilled and motivated team members with autonomy and ownership over deliverables and workload management
Regular reflections on how to become more effective	Continuous learning, frequent reflections on activities self and process improvement leading to greater efficiencies

*Fig.3. – Agile Twelve Principles (Agile Alliance, 2001) (Wysocki, 2014 A)*

As a result, of the demand for innovation and adapting to changing business objectives more and more organisations outside of software are moving to Agile Project Management (Singh

et al, 2012) (Ahimbisibwe et al, 2015). It also allows for the identification of customer needs keeping them at the heart of the business (Schwaber, 2004)(Thomke & Reinertsen, 1998). The agile mindset is allowing organisations to react much quicker to changing requirements and needs of the external business environment by gathering requirements in iterative stages, reducing uncertainty whereas traditional methodology would act as a barrier with its strict linear model and requirements gathering upfront (Angioni et al, 2006).

*Iterative/Hybrid - Lean*

Closely related to agile project management and contrasting to traditional project management, Lean is focused on extracting as much value from a project while minimising or removing waste through the five phases DMAIC - Define, Measure, Analyse, Improve and Control – (Fig.4.)(Ballard & Howell, 2003)(Moujib, 2007). While this does address some issues with traditional project management such as coping with change and lack of project requirements knowledge it does not however address the issues of enabling innovation, allowing for creativity but instead focuses solely on value-add activities.

PHASES	DESCRIPTION
Define	Clear outline of problem, goals, high level as-is process, requirements
Measure	Determine baseline of current process and root cause. Reliable data collection. Update Project Charter
Analyze	What does the data illustrate? Data driven insights. Examine data and processes. Verification of data and insights. Align problem statement
Improve	Brainstorm potential solutions. Select, implement, and verify solution. Map To-Be processes
Control	Maintenance of solution ensuring sustainability. Documentation of quality assessment requirements for sign-off

*Fig.4. – Lean Six Sigma Phases (Ballard & Howell, 2003)(Moujib, 2007)*

*Conclusion*

As a result of the availability of differing project management approaches Barlow et al (2011) argue that the criteria for selection should be considered to determine best fit for what



organisations are trying to achieve. In some cases, the criteria for selection are based on the company’s culture rather than aligning with the strategic objectives of the initiative or at high level, the company, causing project failure. From this, the research infers there is a need to understand strategic management with the purpose of alignment.

### ***Strategic Management and Initiatives:***

Strategic management is concerned with the management of strategic analysis and implementation that is identified to change how the organisation “does things” in response to internal or external environmental factors (Grundy, 1998)(Cooke, 2017). As a result, strategic initiatives are identified to develop the organisations capabilities and to provide competitive advantage (Al-Ghamdi, 1998). Most authors agree the methods of identifying strategic objectives work and advise that the issues faced by organisations is not in the formulation but the implementation (Grundy, 1998)(Beer et al, 1990)(Al-Ghamdi, 1998), the reason argued is that implementation is seen as an operational activity rather than project based.

### ***Conclusion***

This research will investigate how implementing strategic initiatives through a project-based approach impacts the success of those objectives. It will also assess how the interrelationship between project managers and strategic managers affect their decisions on choosing a project approach.

### ***Integration factors of Project Management and Strategic Initiatives:***

Review of literature highlights the discrepancies between projects and organisational strategy; 60% of projects are not aligned with organisational strategy and a large number do not achieve their objectives (APM, 2015)(PMI, 2015)(KPMG, 2010). This is a matter of concern for organisations with an increasing demand to deliver, high value, customer centric and quick to market products/services to their customers and stakeholders. If the projects that are implemented in an organisation are not following the strategic objectives of a company then organisational efforts and resources are wasted instead of being directed towards achieving organisational goals.

There are several capabilities leaders must develop to build organisations that will meet the needs of the 21<sup>st</sup> Century and allow for Agile project management to be an integral approach to how strategic objectives are identified, managed, and implemented (Aaron de Smet et al,

2018). Organisations must move from a reactive mindset as agile organisations are best suited to thrive in unpredictable environments. They must create a vision for their project and strategic managers to follow and communicate that vision to everyone enabling collaboration and strategic initiative success (Kotter, 2007)(Aaron de Smet et al (2018). Three capabilities identified, stress the importance of transformation from top leadership in their communication of priorities to their teams; transforming the way organisational functions work together becoming more collaborative and cross functional; and transforming the organisations purpose, design, and culture to fit more with the agile mindset.

### *Conclusion*

To effectively implement strategic initiatives using project methodology one must understand the integrating factors of both and how they impact one another. All projects implemented should be assessed and aligned with a strategic goal, if they are not meeting strategic goals then steps must be taken to understand the true value it is providing. Any project implemented that is not aligned to a company’s strategy, is taking time, resources, and money away from other priorities. In addition, according to the PMI pulse report “High performing Project Management Officers nurture capabilities that enable organisations to successfully implement strategy, contribute more value to their organisation and ultimately impact financial performance.” (PMI, 2013).

### *Conclusion*

The literature infers that three key concepts must be understand in relation to implementing Strategic Initiatives in an increasingly global environment: Accepted approaches to Project Management, Strategic Management & Initiatives, and the Integration of both. As such, the author takes the three significant themes to form the basis of the research question aswell as develop key objectives and sub-questions for research outlined next.

## CHAPTER THREE - RESEARCH QUESTION

### *Research Question and Rationale:*

Review of the literature indicates a need to understand the impact globalisation and the dynamic environment the professional services industry operates in has on the implementation of strategic initiatives. Historically, strategies are implemented via Predictive (Traditional / Waterfall ) methodology as the rate of change was not as high. While this is still a hugely relevant form of Project Management dependant on the project requirements, because of the increased rate of change, organisations need to have greater adaptability and have systems in place that will allow them to implement those strategies as quickly as things are changing. At the same time, they must set themselves up for success by future proofing in anticipation of further change, moving from a reactive mindset to pro-active.

Owing to the number of ways in which a strategic initiative can be managed this report zones in on the effect of neo-classical Project Management methodologies as the literature indicates a need to understand more on this subject. Therefore, the author has defined the research question; What impacts do neo-classical project management methodologies have on the implementation of strategic initiatives in multinational organisations?

### *Research Purpose:*

The research purpose will address the following objectives:

- ✦ Understand factors influencing decision makers in aligning project management methodology to strategic initiatives
- ✦ Identify key principles on deciding project management approach (traditional -v- neoclassical)
- ✦ Assess through qualitative research the degree of project management implementation and its effectiveness (use of methodology, context framing)

### *Research Sub-Questions:*

To fully understand and answer the research question, further research sub - questions to be answered include :

- ✦ What level of governance is required to ensure strategic initiative and project management alignment?
- ✦ What role does organisational culture play in implementing project management approaches and strategic initiative alignment?

- ✦ How are communications and change management systems utilised to connect project management and strategic initiatives?
- ✦ What quality assessment processes and procedures are in place and required; to identify and review appropriate project management methodology?

***Conclusion:***

Having defined the research question, objectives, and sub-questions the research methodology required is qualitative in nature due to the type of primary and secondary research essential to gain insights on these pivotal points. A more detailed breakdown of available methodology, chosen methodology and rationale behind this approach is outlined in the next section.

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## **CHAPTER FOUR - RESEARCH METHODOLOGY**

‘Research philosophy is an over-arching term relating to the development of knowledge and the nature of that knowledge’ Saunders et al, (2009).

As a result of the ever-increasing pace of change in the organisations external environment; this project seeks to understand how the evolution of neo-classical project management styles impact the implementation of strategic initiatives. This is a small sample, qualitative study implementing semi-structured interviews and observation using non-probabilistic purposive sampling techniques of 10 participants performing Project Management or Strategic Management roles ranging from middle to upper management levels within professional services industry in Ireland. The research approach is interpretivist in nature, due to the reliance on gathering insights from the participants in project/strategic management positions and the researcher’s interpretation of how they feel or understand neo-classical project management impacts strategic initiatives as argued by Saunders *et al.* (2016). Epistemological considerations are concerned with “the question of whether the social world can and should be studied according to the same principles, procedures and ethos as the natural sciences?” (Bryman, 2008: 13), by following interpretivism design, the objective is to provide a richer understanding and interpretation of the relationship between project management and strategic initiatives. Subjective data will be gathered from literature and project management and strategic management professionals. Saunders et al. (2016) advises access to large samples is often difficult; consequently, an Inductive approach favours smaller sampling.

### ***Qualitative Approach:***

“Qualitative research is a research strategy that usually emphasizes words rather than quantification in the collection and analysis of data. As a research strategy it is inductivist, constructionist and interpretivist” (Bryman, 2008: 366). Due to the nature of inductive approach a qualitative research method is proposed; studying the participants meanings and understanding of the impact of project management on strategic initiatives (Saunders et al. 2012). In contrast, quantitative research measures numerically and relies on clear unambiguous context and questions, which would not be suitable in this instance as it would not provide the researcher with an understanding of the participants interpretation of impact (Saunders et al. 2012). Qualitative research also allows for the conducting of in-depth interviews providing context and conditions for the relationship between project management and strategic

initiatives. Importantly it will recognise the relevance of people’s personal experience with the use of project management methodology and their understanding of how effective it is or is not.

Some restrictions with qualitative methodology are the concern that findings cannot be generalised and are specific to context, leading to bias (Bryman, Bell, 2007). However, these are restrictions that do not adversely affect the nature of this study and are not priority for determining what factors influence decision makers in aligning project management methodology to strategic initiatives; identifying key principles on deciding project management approach (traditional -v- neoclassical); or assessing through the degree of project management implementation and its effectiveness (use of methodology, context framing). To offset this Saunders et al,(2016) argue that the interviewee should be experienced and knowledgeable in the field being researched, in this case project and strategic management in the professional services industry, which form the selection criteria of participants in this research.

#### *Data Collection/Analysis:*

The methods of data collection and analysis are both secondary and primary research. Secondary research includes literary review of reports, article, and theoretical information on project management, strategic management and the related methodology, findings, and people. In line with qualitative research the primary research utilises interviews and observation centred on the people relevant to project management and strategic management within the organisations Finance function. The sample size is small including 10 participants with ranging experience from 10 – 30+ years. It focuses on professionals both male and female, in Global or Regional, Project Management or Strategic Management positions, within a Professional Services Multi-National Organisation, across middle management and senior leadership positions in Ireland.

#### *Participant Information and Rationale*

The 10 participants selected perform the roles of Project Manager, Project Lead, Strategic Initiatives Manager and Strategic Initiatives Lead within Company Z. Located in Ireland they are responsible for projects implemented Globally, within Europe, North America, or Growth Market regions. As the research focuses on Project Management and Strategic Initiatives the logical method of selection of participants were requested from the two areas of the same name

specialising in the Finance function. Moreover, the researcher has close ties to the selected participants allowing for greater access to information and research gathering. Three Project Managers and two Project Leads from the Project Management Function, Two Strategic Initiatives Managers and Three Strategic Initiatives Leads from the Strategic Initiatives Function provide insights via interviews, observation, or both (further detailed breakdown of extent of participation App.1.).

Both Project and Strategic Initiative Managers within Company Z fall under middle-management. Both roles have high levels of authority and autonomy, are responsible for the day-to-day management and progression of their functions and assign resources to their relevant teams as needed. Project and Strategic Initiative Leads fall under upper management and are responsible for setting the agenda and direction of their relative function. They are also responsible for assigning the relevant managers to the required initiative or project. As such, these four roles provide the researcher with a holistic perspective that covers high-level strategic decision making and the on the ground translation of those decisions for implementation. As such, the primary data illustrates how Project Management and Strategic Initiatives relate to each other from the holistic and varying perspective of the participants.

#### *Interview Approach*

Interviews follow a semi-structured style described as qualitative research interviews (Saunders et al, 2016)(App.1. & 2). The questions centre on the key themes mentioned in the literary review and research question sections of this report recommended by Saunders et al. (2016). This allowed participants to provide as much context as possible and not restrict their scope of answers (Robson, 2002). The researcher opted to draft the interview questions themselves rather than use a questionnaire already developed. This allowed them to ensure all context and angles would be covered. To do this, the researcher analysed, and synthesised interview questionnaires used in the literature that were relevant to answering the research questions and objectives outlined in the research question section. These influencing factors of strategic and project management pulled from the literature enabled the researcher to draft questions in terms of Governance, Culture, Change Management, and Methodology. To ensure effective use of time and data gathering, further detailed sub- questions were used to keep the participants on track and avoiding tangents.



Prior to conducting the official interviews with participants, the interview questions were piloted with a small group of friendlies; two team members of the researcher who were familiar with both topics of strategic and project management, and one co-worker who was not familiar with the topics. The reason for this was to test that effectiveness of the line of questioning and tweak based on level of exposure to the academic concepts, clearness of language used, and need for further questions. Findings of the pilot confirmed the questions were clear and concise across both groups, however some technical academic terms were changed for simpler language. Due to availability of the participants, out of the ten interviews scheduled seven were conducted.

### *Observation Approach*

The observation research instrument leveraged work shadowing of eight out of the same 10 participants (*App. I.*); the researcher leveraged two one-hour Steering Committees with five of the Strategic and Project Management Leads to gain insights to decision making criteria and processes. The two Steering Committee meetings were virtual via Microsoft Team , one taking place in May 2021 and June 2021. This enabled the researcher to gain two different opportunities to gather insights and determine what elements of these calls were repetitive and which were once off. Three, two - hour on the job shadowing of the remaining participant sample was conducted. Two individual follow ups were then scheduled to further clarify information gathered. As a result of COVID restrictions on the job-shadowing was limited to listening in on daily calls with the managers, leads and their teams. These observation conditions align with the inductive and interpretivism research styles allowing for greater insights gathering from the Project Management and Strategic Management professionals. Overall estimated time commitment from participants for interviews was an estimated two hours; one - hour initial interview and one - hour follow up interview. Observation was an estimated time commitment at four - hours; two - hours initial observation and two - hours follow up.

### *Data Collection and Storage Systems*

In conducting the interviews an audio recording device was used, Microsoft Teams recording functionality, to ensure all feedback was captured – this was then summarised by the researcher and the recording deleted due to data privacy regulations within Company Z. The information was made available to the participants upon request to allow them to review and make changes or retract. Where initial recording was not agreed with the participant, handwritten notes were

taken and summarised post interview and made available to the participant upon request. This was also be the case for the observation session notes.

All data collected was reviewed in detail and categorised using mind maps due to the level information gathered. Once reviewed, a thematic approach of analysis was applied to match that of the collection method. The researcher found this was a logical form of collection and analysis so that findings could be translated into digestible and impactful results. Further information on this is found in the analysis chapter.

### ***Ethical Considerations:***

In terms of ethical considerations, this research poses little ethical risk to the participants involved. Any ethical issues have been identified and addressed in the design of the research. The ethical risks identified are Data Privacy and rights of the participant. In requesting participation, a written consent form provides participants with an overview of intent of study, requested participation, options of modes for participation, time commitment and overview of how information is stored and used. In addition, participants were given the opportunity to withdraw from the research at any stage; a contact email was provided do so. Written summaries were made available upon request to allow for review or retraction. For Data privacy issues – all participants remain anonymous and given a unique identifier number as a reference assigned to their role title. Data collected via recordings were summarised and written up with the original recording deleted. Data from observation notes or interview summaries based on recordings are held on secure password protected hard drive and will be deleted in accordance with NCI policy.

### ***Conclusion:***

The research methodology chosen allows for a holistic approach to data gathering. The participation of professionals at middle and senior management level with experience spanning from >10 to over 30 years provides varying perspectives based on exposure to the levels of responsibility aswell as differing viewpoints based on experience in the strategic and project management area. Given the size of the organisation with thousands of employees and multiple functions; distilling the primary research to solely focus on the Finance Function of Strategy and Project Management allowed the researcher to be more defined and direct in their data gathering. The seven interviews gave the researcher the opportunity to hear directly from the

participants and gave the participants the opportunity to voice their opinions. The eight observation activities then allowed the researcher to analyse and compare participant insights on the topics with the actual practices. As a result, the analysis and findings detailed in the following section provide impactful insights into perception versus reality.

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## **CHAPTER FIVE – ANALYSIS AND FINDINGS**

### *Approach*

Leveraging the research methodologies previously discussed; interviews, observation and researchers own experience the data was collated, analysed, and synthesised. Five noteworthy themes emerge as having significant impact on the implementation of strategic initiatives via project management methodology - Governance, Culture, Communications & Change Management and Application of Project Methodology Frameworks. Due to the nature of this research considerations are made relating to the analysis and findings in terms of the specific parameters of this case study and its environment influencing the findings leading to the application of a micro lense. The following sections examine the significant findings across the research methodologies pertaining to each theme.

### *Key Themes*

#### *Governance*

Governance relates to the system of codes, practices and processes that are used to direct and control an organisations people, processes, performance, and purpose (Yukl et al, 2020). From the literature it is understood that leadership and governance play a key role in management of strategic initiatives; without the right leadership and governance in place it is challenging to ascertain an effective level of ownership and decision making needed to implement strategic initiatives that align with strategic goals across the breadth of multinational organisations (PMI, 2021). The findings from this case study align with this thinking – where the right people with the right skills are leading the relevant project, success is seen, when this is not the case challenges are faced resulting in delays and poorer results. The presence of governance structures is described and evident within the strategy initiatives function however there is ambiguity as to the formal process surrounding criteria for initiatives and project management alignment.

Steering Committees made up of Strategic Initiatives Leads and Project Management Leads meet quarterly to discuss, review, and make key decisions on initiatives in the current pipeline and new additions, this was consistent across all research methodologies. Consensus confirms this as being a frequently occurring forum and the researcher regularly attends these committees. The benefits of this academically for strategic project management mean all

stakeholders are made aware of what is happening on each initiative, where synergies can be made and where collaboration can occur to avoid duplication or rework (PMI, 2021), the data gathered highlights that this forum in practice supports these academic assumptions.

On the other hand, while this is an effective forum for managing initiatives and decision making between Leads for traditional projects; it does not address the issue of aligning strategic initiatives to project management methodologies in a dynamic environment, where requirements are changing, and clients require quick turnaround. For example, there is no evident formal process or agreed criteria for determining what project management approach should be taken suitable to the initiative and who should then lead it.

The data suggests that where strategic initiative, project manager and project methodology currently align it is coincidental rather than a deliberate decision made by Leads. The Strategic Leads impression is that there is a process, and they choose the Project Lead and Manager to align with the project methodology needs of the initiative however in practice that is not the case. In neither, of the Steering committees attended was this discussed, instead Strategic Initiatives were assigned based on availability rather than suitability. In addition, Strategic Managers, Project Leads and Managers agreed that selection criteria were made based on availability. This is imperative as all Project Managers in this function specialise and have expertise in traditional methodology, but few have the required skills for Agile methodologies. The literature and case study data indicate that this results in inexperienced resources being responsible for approaches they do not have the skills to apply leading to failed initiatives, high turnover of project managers and team members, higher costs, and extended timelines (PMI, 2013), the opposite is true for those correctly aligned. As such, this is something that will need to be addressed as part of strategic planning and strategic human resource management for this function to ensure they have the right people with the right skills.

### *Culture*

The culture of an organisation comprises of shared values, norms, and beliefs for their workforce (Yukl et al, 2020). This infers that Organisational Culture has a strong correlation to the organisation’s hierarchy, therefore it’s Leadership and subsequently it’s management style. The research undertaken for this paper highlights the role Organisational Culture plays in implementing project management approaches and strategic initiative alignment. In General,

Company Z’s wider culture is one that is open to change and continuously adapts to the needs and demands of the external environment and its clients. This is also echoed by the influence and attitudes of its Leaders in championing change. It is also an industry leader in aligning their project management methodologies with their Clients’ needs and application of Agile as a core skill. However, it is only in the last two years that this case study function within Company Z has started to understand the importance of Agile methodology in managing those internal initiatives that support the business to address those needs. This function has been slow to move from Traditional project management to a toolkit of methodologies to choose from that are fit for purpose. As a result, many projects are misaligned and or led by inexperienced managers leading to project failure or challenges. However, from the interviews and observation it is evident that because of the strong organisational culture of change and the influence on its Leaders, the Strategic Leads and Project Leads have now committed to rolling out neo-classical Project Management training as a mandatory requirement for all its resources by the end of the next fiscal year.

By creating a vision for their project and strategic managers to follow, they are enabling alignment of best approach, collaboration, and strategic initiative success (Alvesson, 2010)(Schein, 1992, 2016)(Trice & Beyer, 1991, 1993).

#### *Communications and Change Management*

Communications and Change Management play an essential role in cascading messaging to the relevant stakeholder groups namely those who are impacted by the change, those who are change drivers and those who must buy in to the change due to decision making (Leonard, 2011)(Kotter, 2007). Effective change management procedures including communication can act as barriers or enablers to strategy implementation via project management. The evidence gathered in this case study shows that sharing insights via the Steering Committees, Quarterly Status Reports helps the Project Managers to show the value they are delivering and align with the strategic objectives of the initiatives. Where this has been successful Project Managers in this function have delivered projects fully aligned to the Organisations objectives even during times of change such as COVID. Examples provided illustrate that programs that were initially designed for in person deployment were able to effectively switch to virtual through the Agile methodology utilising the above communication channels. Frequent sprints or playbacks meant Project Managers swiftly received guidance and realignment on changes in objectives and the landscape they are working in through frequent communication and ensuring that stakeholders

were bought in to the concept changes throughout. The opposite occurred on programs that did not employ these methods instead waiting months before communicating or requesting directional guidance leading to producing deliverables that were out of date with objectives and did not work in the new environment. A learning program that could have pivoted to virtual due to COVID restrictions and deployed this year instead progressed as is and delivered a program that was not fit for purpose. The result is a whole program re-design with increased costs and delayed timelines. This ties in with the previous theme of Project Lead and Manager that were selected to drive the program not having the relevant skills to lead a project that required agile methodology where requirements had changed.

The use of technology was another evident communication enabler where in person meetings no longer were available. Prior to COVID remote teams have been in existence and have leveraged technology to ensure seamless communication between teams and time zones (Mudditt, 2020)(Newman et al, 2021). Interpretation of the primary research data identified three groups (App.3.) according to their view on technology as a communication tool:

- 1) Integral to the process pre and post COVID
- 2) Good alternative to traditional communication and were quick to adapt due to change in environment
- 3) Using technology as a workaround until things go back to “normal”.

Group One were made up of those who have experience of working closely and daily with their global teams and so were ready for the change in environment. This meant they had already established collaboration tools such as Microsoft Teams, Mural, Mentimeter to engage their team and ensure awareness leading to quick decision making. Overlapping time zones were leveraged for virtual meetings and then work was handed over on rotation through shared repositories like SharePoint, Whiteboard. This connection between team members and stakeholders allowed continuous progress on deliverables, alignment of strategic goals and effective implementation of the project methodology.

Group Two and Three consisted of those who worked in a co-located environment and so had reactive mindsets to communication and change management technology. While Group Two was more receptive and indicated they would continue to use it going forward and can see the benefits as outlined by Group One, Group Three have not fully incorporated it into their



communication and change management strategy as they advised they will wait until the environment reverts. This suggests that only Group One and Group Two are future proofing themselves to better align strategic initiatives and project management through communication and change management “In the New”. Group Two has undertaken a rapid learning curve to get up to speed providing self-paced training for their teams whereas Group Three is still reluctant to change to the “New Normal”. With further globalisation and the rise of remote working literature states that the need to understand the capabilities to manage these remote teams will be important to successful strategic project management (Hill, 2020)(Dulebohn, et al, 2017). Those who do not adapt run the risk of becoming irrelevant and incapable of performing their roles effectively.

#### *Application of Project Methodology Frameworks*

Project management is the application of tools, knowledge, and techniques to identify activities required to meet project objectives via three main schools of thought Traditional, Agile or Lean (PMI, 2021). Insights obtained from the data infer that there are several Project Management methodologies in practice for this case study; PMP, Agile, Lean, as well as several Company developed and owned tailored versions to include Design Thinking and creative mindset adoption.

The Project Management Operations structure used are simple in nature divided by subject expertise such as Legal & Regulatory, Organisational Change, Process Improvement, Transformation etc. Once Project Managers have been assigned a project, they have a high level of autonomy to mobilise and run as they see fit. Decision – making on who to assign Project Manager as previously discussed in practice is based on availability so it implies that the subject expertise structure is not effective. This is not the case for all subjects however as the Legal and Regulatory area of this function has a substantial and disproportionate number of resources assigned to it and therefore is guaranteed to have an expert assigned. The main area of concern is with the strategy intense subjects such as transformation and org change ; these high value, high impact, high visibility projects are not given the same level of human resource management/planning. There are only a small number of Managers with the necessary skills and experience to drive these programs due to lack of Project Methodology training and certifications. As such, the resulting project management approach often reverts to what the Project Manager is trained in rather than what approach is optimal or a Project Manager poorly applying methodology they do not have the skills or expertise to implement or manage a team

around. Literature on this topic discusses the requirement to ensure a formal project management approach that is fit for purpose stating that most projects that fail are due to lack of Project Management expertise, training, or incorrect methodology application (PMI, 2013, 2021)(Wysocki, 2014 A & B).

It is clear the issues in methodology application are not due to the lack of awareness or interest in applying the appropriate approach instead as previously mentioned is down to availability of resources with the necessary skills. This will need to be addressed if the function is to succeed. One solution already in progress by Senior Leadership is the development and deployment of a mandatory Learning program to all its functional Project Management Operations teams. The intention is to widen the resource pool so the grouping is based on subject expertise but within in each group all Project Management Operations members will be skilled in all methodology at a baseline. A concentrated effort is also being made to prioritise the in-demand skills such as Agile and rapidly increase that offering over the next fiscal year.

The data suggests that where strategic initiative, project manager and project methodology currently align it is coincidental rather than a deliberate decision made by Leads. Once the Project Manager is assigned and they are skilled and decide on the approach that fits the initiative it has led to more successful implementation and alignment aswell as reduced costs. Due to COVID-19 and its effects, reliance on adapting to changing demands or remaining relevant has been highlighted and brought to the fore where it had not been as visible previously. Consequently, the Projects that delivered good results over the last two years in this function were those that had a Project Manager that was skilled in Agile and its implementation. Main benefits focused on being quick to gather and pivot to new requirements, agility in getting those new approaches before steering committees to gain buy-in and ensure alignment and finally iterations whereby deliverables were continually being deployed instead of a mass deployment at the end of the year. For programs who did not apply the appropriate methodology very few deliverables were realised, and most have had to go back to the drawing board for redesign in the next fiscal year after months of work and extra costs.

Another contention point for alignment of project management and strategic initiatives relates to the quality assessor element. As it stands, there is no formal Lessons Learned or Quality Assessment process to analyse the effectiveness of each project. Quality Assessment solely

focuses on metrics rather than approach. While the metrics are a good indicator of how successful a project is, it does not capture where things went wrong, what went right and where it can be improved. This leads to repetition of mistakes and does not encourage teams to learn from one another. Currently only a few Project Managers in this case study document and store their lessons learned, making them available to other teams. They are not discussed with the wider group or formally housed in a central repository. Although it is an integral component of Project Management as it is not a requirement by the function it often is dropped for priority items and to move onto the next deliverable. Studies have shown that this is a common issue within organisations that are focused on moving onto the next thing rather than leveraging the huge learnings and value that could be obtained from stepping back and understanding how to apply what is learned going forward (Jugdev, 2012).

***Conclusion:***

Overall, the identified key themes of Governance, Culture, Communications & Change Management and Application of Project Methodology Frameworks are in line with literature and secondary research as being the most impactful on project management and strategic initiatives implementation and alignment. Awareness of the key components is evident within the function of this case study and are understood by the members of this function. However, what was not expected is the disparity between perception and practice. In all five key themes the research methods provided insight as to the scale of which they are applied. The evidence suggests that members of this function believe there are formal processes and procedures in place following best practices for the key impact areas however when examined these processes are not being implemented. Strategic Initiatives are assigned to Project Managers by availability rather than skills required, communications & change management systems are not streamlined across the function with only a subset using them to their full capacity being slow to adapt to the “new normal”, appropriate application of Project Management methodology is in use by only a subset of the members due to a lack of widespread training and no rigorous quality assessment framework in place.

On the other hand, where these key components are in practice informally, success can be seen resulting in reduced costs, quick turnaround and greater collaboration and alignment of strategic initiatives with project management methods. This infers that by formalising these processes broadly, introducing more training were required and communicating clearly and

effectively it should result in more effective implementation of strategic initiatives. There is a good foundation within this function, but more work is still to be done.

Finally, it must also be noted that the findings shown here are representative of the specific function chosen within the multinational organisation. Further studies undertaken and applied to other functions within the organisation may show interesting comparable results as to how widespread the disparity of perception and reality is when it comes to implementing strategic initiatives via project management methodologies and whether the issue only lies within this function.

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## CHAPTER SIX – DISCUSSION

### *Approach*

Having analysed both primary and secondary research and examined the findings at a micro level, this section seeks to understand the implications of the research thematically on a macro level. Understanding how the findings impact the wider organisation and industry while outlining recommendations and potential next steps to address the results of those findings. In keeping with the flow of the Analysis and Findings chapter the researcher has organised the discussion into four themes Governance, Culture, Communications & Change Management, and Application of Project Methodology Frameworks.

### *Key Themes*

#### *Governance*

Findings from the case study focused on the Finance function within Company Z outline that while there is a governance structure in place it is not fully fit for purpose, it is a system of short-term solutions instead of long-term strategic decision making. The function is that of an update system rather than a collaborative structure that allows decision makers to assess needs of the projects, resource requirements, skills needed and available, and then make informed decisions. Decisions made are centred on availability and the quickest way forward rather than suitability and expertise. Whether this is a companywide issue is inconclusive due to the specificity of this case study and data but is an area of interest for further exploration.

In this instance, if we assume it is just a function specific issue it will still have implications on the wider company. This Governance structure is used by the wider organisation and other functions for strategic planning activities such as Human Resource Management (HRM), Financial management and Company Strategy. These activities necessitate informed and accurate inputs from the Project and Strategic Initiatives Leads on requirements for the future. The HRM function performs yearly recruitment drives and rely on function Leads to provide details on skills, experience required as part of this drive. Financial Management function are responsible for analysing companywide internal budget forecasts, prioritising based on budget available for the short/long term, return on investment, and level of impact. Performing this highly complex and detailed activity depends on the accuracy of information received from the Function Leads coming out of the Steering Committee meetings re: fixed and variable costs in relation to benefit and impact on organisation. The Organisation Strategy function must

understand what the short- and long-term goals of the organisation are and assess initiatives based on their ability to deliver on those goals. With an organisation of this size, prioritisation is key as not all initiatives can be approved. As such, insights from this governance structure are used as input for the Organisation Strategy to decide on what is approved and when they will be worked on.

Due to the basic approach of the governance structure, there is a disconnect between Lead’s perception of its objective and how it performs. Leads are not using this framework to receive accurate portrayals of the current and future landscape needs, to then translate and communicate to the wider functions relying on this data in their holistic approach.

The researcher recommends leveraging the current foundational governance structure and take three steps to make it more robust:

- ✧ Leads will need to take a step back and perform an analysis of the current landscape relating to resources, pipeline of projects and skills; comparing what is available, what is needed and the delta. Once done they will be able to provide the wider company with more valuable data as inputs to their activities.
- ✧ A set of clear guidelines on purpose of the Steering Committee as well as criteria for decision-making on project approach, resource selection should be developed and communicated to the function. This will ensure alignment of all stakeholders on what they are there to discuss, leading to more effective and efficient meetings and better decision making.
- ✧ Assess current audience of these meetings to determine attendees that are required or optional. For those no longer required either remove from the list or include as optional. For those not on the list but are key stakeholders this activity will allow the Leads to ensure they are part of this crucial governance step.

The above learnings and recommendations are applicable to any organisation within this industry as by their nature professional services companies heavily rely on Governance to manage and direct their organisations where their main output and management activities centre on their people.

### *Culture*

The culture of Company Z is one of change, innovation, and client value in line with the purpose and culture of all the other organisations in the Professional Services Industry. Three

examples of Professional Services organisations in the industry; Accenture, Deloitte and KPMG have tightly linked organisational purposes centred on forward thinking, future proofing strategy development.; with their wider organisational cultures following suit. Where things may differ and would need more research is to the extent at which this trickle down to the individual functions and areas.

Company Z has a quite robust culture of change and innovation at an organisational level but in relation to this case study Finance Function it has been slower to adopt or react. It has been stuck in the traditional approach to Project Management and is slowly realising a need for a diverse toolkit. It must be noted, that due to the strong organisational culture of change it has pulled this function along in the last two years to start making substantial steps to move with the change such as providing mandatory training to their resources on adaptive project methodology. This infers that the company culture can contribute to how an organisation operates, and while all functions or members may not be at the same level of cultural adaptiveness, if it is strong enough members who are resistant at first should feel the need to adopt based on what they see around them.

The main take-away from a company and industry perspective is to assess the level of penetration of company culture to all functions. Once assessed actions can be taken to help members connect to those shared values and beliefs, and what it means for them throughout the organisation. Some actions include:

- ✦ Townhall events to encourage networking and sense of belonging.
- ✦ More transparency from Leadership who must actively discuss, lead, and demonstrate the company culture daily with their own teams.
- ✦ Make it more real for people in terms of how their work and roles impact on culture and vice versa. Develop tangible actions based on those concepts as performance priorities.

The above recommendations will help to align the organisation culture down through all functions, enabling members to relate to the culture, and make the connection between their organisational culture, strategic objectives and project management approaches they should be applying whether adaptive or predictive.



### *Communications and Change Management*

Evidence from the case study infers that communications and change management tools in use for this function such as Steering Committees, Quarterly Status Reports and team working sessions are effective tools in keeping stakeholders informed of progress and provide platforms to Leads and Managers to illustrate value delivered. This mostly applies to predictive approaches - the tools work well for high level, straight forward expected updates to stakeholders. While these are effective to a much lesser extent when applied to the adaptive approach, issues arise when decisions and strategic direction is needed in an agile way due to changes in the environment.

Project Managers with the adaptive project management skills to implement frequent sprint playbacks and leverage technology for frequent communication with stakeholders to achieve strategic direction swiftly were most successful. Project Managers that did not have these skills or did not leverage technology and were fitting the project that required adaptive into predictive methodology were unsuccessful. Frequent communication is a must in a changing environment; sprint playbacks, short release cycles and robust communication structures leveraging technology should be implemented across the board.

A key learning is the importance of technology in effective communication and change management. As previously mentioned, based on views of communication technology, participants were split into three groups (App.3.). Given the literature on the rise in remote working and globalisation, in addition to the global nature of Company Z the researcher expected to see receptive views to communication technology. Groups One and Two while at different levels of adaptiveness of communication technology, had implemented or started to implement long-term rigorous communication systems leveraging technology. This was in line with literature on the topic stating that communication technology is a key enabler to ensure collaboration across location and time zone, via virtual meetings and shared cloud repositories.

In contrast, Group Three’s view of communication technology as an interim solution was unexpected, as they did not see the value in implementing communication technology. Other than the use of Microsoft teams for calls and using cloud repositories to send links to information there was no collaborative approach to the technology. If this is a much wider result and view outside of this case study function, then there could be a serious disconnect on flow of information across the functions. In addition, it is a possibility that key information

from co-located teams is not being transferred to the wider group, and the lack of use of the collaboration technology would be causing delays in work being done, incur costs due to delayed timelines and potentially delivery of solutions that are not fit for purpose. All of which would impact on strategic initiative implementation.

Based on these learnings, it is a real possibility that the same views may be held by members in other organisations in the industry. The researcher recommends the following approach to be taken by this case study function and organisation, but could also be applied and have impactful results on other organisations in the industry:

- ✦ Organisations perform wider investigations into the communication and change management tools in use.
- ✦ Clear and agreed guidelines on use and benefits of communication technology to gain buy in for Group Three types.
- ✦ Easily accessible, group or self-paced training on communication technology available.

With more effective and streamlined communication techniques and frameworks, stakeholders will be better equipped to understand; how projects are performing, ensure alignment of strategic initiatives with project methodology, and course correct where required by providing strategic direction and decision making in a timely manner. While traditional communication techniques can be effective for predictive project methodology; adaptive project methodology requires rapid and effective communication and change management tools, that can keep up with the pace of change to implement strategic initiatives that remain relevant.

#### *Application of Project Methodology Frameworks*

Findings from the primary research highlights several things relating to the application of Project Methodology Frameworks:

- ✦ Categorising the Project Management Operations (PMO) area by subject is the right approach as it ensures the project teams have the relevant subject expertise.
- ✦ Consistent level of awareness of the various project methodologies across the case study function.
- ✦ All PMO members are trained in Predictive methodology with just under half trained in Adaptive.
- ✦ Project Management approach is applied based on Project Manager experience rather than suitability.

- ✦ Alignment of Strategic Initiative, Project Manager and methodology is coincidental rather than deliberate.
- ✦ Quality Assessment process based on metrics only, does not include approach

These findings infer that inconsistencies of project methodology application are not due to member awareness or interest, instead it is due to lack of training and formal selection processes, as well as retrospective quality assessment of implementation. While the PMO structure is set up by subject not all the members are trained on the project methodology toolkit resulting in poorly implemented initiatives. Additionally, Leads are not implementing a formal selection process for their project managers. Leads currently believe managers are chosen based on expertise but data tells us they are chosen on availability. Leads agree on the criteria but are not implementing it or following through on it with their decision making. Finally, quality assessment is solely focused on metrics rather than investigating what worked well in terms of application of methodology, what did not work well, and what improvements can be made.

To address the inconsistencies in application of the methodology, the following recommendations are suggested:

- ✦ Leads must develop and agree on a rigorous formal selection process to align strategic initiatives to the right people, with right skills to manage projects according to right approach.
- ✦ Leverage the current skills and resources landscape analysis activity recommended in the governance section to understand current state, required state and the delta.
- ✦ In the interim, leverage the mandatory adaptive training for all current members outlined in culture section to provide a baseline of skills to all members.
- ✦ Update Quality Assessment process to include clear guidelines and criteria for assessing project implementation. Lessons Learned should be documented and formally cascaded to the wider groups allowing for continuous improvement and learning.

Although the data has been gathered from the Finance function with Company Z, other functions within the company, as well as organisations in the professional services industry require high performing PMO teams and so this study is highly applicable. They could benefit from performing a similar study to determine if they are facing the same issues and then apply the described recommendations.

***Conclusion:***

Overall, the learnings from this case study are highly applicable to not only the wider organisation but the professional services industry and centre around formal process documentation and implementation, communication within stakeholder groups, and strategic humane resource management. There are also some findings and recommendations that have direct impact on the wider organisation not just the case study function; the same steps taken in this case study can be lifted and dropped into any other function. Additionally, the findings or recommendations should be relatively easy to address and implement with several recommendations providing a solution for more than one finding.

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## CHAPTER SEVEN – CONCLUSION

This research was undertaken to understand the implementation of strategic initiatives via project management methodologies. Due to globalisation, increased rate of change in the global environment and the amplified use of remote teams, the researcher zoned in on neoclassical methodologies to answer the research question “What impacts do neo-classical project management methodologies have on the implementation of strategic initiatives in multinational organisations?”. The was based on the need of organisations to have greater adaptability and have systems in place that enable them to implement strategies as quickly as things change but to also future proof against further unavoidable change. Owing to the size and span of this research area, to allow the researcher to be more deliberate in their research, a case study of a Finance Function within a multinational organisation in Ireland was chosen as the subject.

### *Approach*

An inductive, qualitative approach to the primary and secondary research was taken to allow the researcher to effectively ascertain the perceptions, meanings, and understandings of the impact of project management on strategic initiatives. Literature review consisted of reports, article, and theoretical information on project management, strategic management and the related methodology, findings, and people. The primary research undertaken involved a holistic approach to data gathering and analysis. Out of a pool of thirty, a series of seven interviews and eight observation activities across middle and senior management level with experience spanning from >10 to over 30 years provided varying perspectives on strategic initiative implementation and project management, based on exposure to the levels of responsibility. They also offered differing viewpoints based on experience in the strategic and project management area.

### *Research*

The two key takeaways from the primary and secondary research centre on:

- ✦ The influencing factors that lead to close links between strategic initiative, project management and right approach.
- ✦ The importance of evaluating perception versus practice.

Three high level concepts of influencing factors from the secondary research as important to understand in the implementation of strategic initiatives via project management in the current

global environment are (1) Accepted approaches to Project Management, (2) Strategic Management & Initiatives, and (3) Integration of both.

- ✦ To effectively implement projects, one must understand the purpose of each project and strategic initiative and the various lifecycle approaches available; predictive, iterative, adaptive or hybrid. As a result of the availability of differing project management approaches Barlow et al (2011) argue that the criteria for selection should be considered to determine best fit for what organisations are trying to achieve.
- ✦ Most authors agree the methods of identifying strategic objectives work and advise that the issues faced by organisations is not in the formulation but the implementation (Grundy, 1998)(Beer et al, 1990)(Al-Ghamdi, 1998), the reason argued is that implementation is seen as an operational activity rather than project based.
- ✦ All projects implemented should be assessed and aligned with a strategic goal, if they are not meeting strategic goals then steps must be taken to understand the true value it is providing. Any project implemented that is not aligned to a company’s strategy, is taking time, resources, and money away from other priorities.

### *Findings and Recommendations*

Having taken the concepts from the literature review and developing research instruments the following insights were uncovered in the findings and recommendations made based on four key themes:

- ✦ *Governance* – Structures that are implemented need to support communication for the business as usual but also allow for effective and quick decision making and strategic direction in the short-term and long term. The objective of the platform must be clear for all and rigorously implemented. There is a disparity between what the Leads perceive it is used for and what it is used for in practice that must be closed. Simple solutions involve current landscape analysis of governance members, formal process implementation including clearly outlined guidelines for decision-making, committee activities and resource assignment.
- ✦ *Culture* – Company culture in Company Z is quite strong and in line with their and other industry competitors purpose centred on innovation, change and strategy development. Overall, culture is effective in promoting change and adapting to new ways of working however work needs to be done on ensuring it trickles down the hierarchy. Some actions to be taken include townhalls encouraging sense of belonging,

Leadership transparency on demonstrating company culture and enabling members to relate to culture by developing tangible priorities based on culture, strategic concepts, and their roles as part of performance achievement activities.

- ✦ *Communications & Change Management* – In general communications and change management is working well for teams that are skilled and experience in adaptive project management methods. Traditional Communications & Change Management methods are also working well for business-as-usual expected activities. However, issues are arising when quick and collaborative communication is needed to respond to rapidly changing needs. Or where teams are no longer co-located and do not buy into the use of technology as a long-term solution. To resolve this the organisation will need to invest time and resources to outline the importance of these tools and provide training on how to use them.
- ✦ *Application of Project Methodology Frameworks* – Inconsistencies in application of the Project Methodology Frameworks was due to lack of training and formalised approach to assigning project managers with right skills to manage project based on required approach. Solutions include mandatory baseline training on adaptive methodology as all resources currently are experience and trained in predictive.

The above themes are influencing factors in linking strategy with project management, and implementation via project management approaches. By addressing these themes, the organisation will be able to effectively implement their strategic initiatives as there will be clear alignment between Strategic objectives, Initiatives, Project Managers, and the project management approach.

### ***Limitations and Further Study***

As this research study applied a micro lense on project management and strategic management professionals, located in Ireland in a finance function of a multi-national organisation there is an opportunity of further study to understand how this would impact on teams in other geographies, or in organisations such SMEs. Additionally, limitations were experienced with access to people due to COVID-19 and the true impact COVID-19 had on their perceptions of the global business environment. As such, areas of further study may want to focus in on how COVID-19 has impacted this area when more research is available in the coming years and people have had more time to digest the effects of going remote as a necessity, and whether it led to longer term repercussion on the future of the workforce and work environment.



## APPENDIX

### *APP 1: Participant Bio*

REF	JOB TITLE	LOCATION	INDUSTRY	EXPERIENCE	REGION	RESEARCH TYPE
P.1	Project Manager	Ireland	Professional Services	<10yrs	Europe	<ul style="list-style-type: none"> <li>• Observation</li> </ul>
P.2	Project Manager	Ireland	Professional Services	10yrs +	Global	<ul style="list-style-type: none"> <li>• Interview</li> </ul>
P.3	Project Manager	Ireland	Professional Services	10yrs +	North America	<ul style="list-style-type: none"> <li>• Interview</li> </ul>
P.4	Project Lead	Ireland	Professional Services	20yrs +	Growth Markets	<ul style="list-style-type: none"> <li>• Observation</li> <li>• Steering Committee</li> </ul>
P.5	Project Lead	Ireland	Professional Services	30yrs +	Global	<ul style="list-style-type: none"> <li>• Interview</li> <li>• Observation</li> <li>• Steering Committee</li> </ul>
P.6	Strategic Initiatives Manager	Ireland	Professional Services	20yrs +	Global	<ul style="list-style-type: none"> <li>• Interview</li> <li>• Observation</li> </ul>
P.7	Strategic Initiatives Manager	Ireland	Professional Services	<10yrs	Europe	<ul style="list-style-type: none"> <li>• Interview</li> <li>• Observation</li> </ul>
P.8	Strategic Initiatives Lead	Ireland	Professional Services	20yrs +	Global	<ul style="list-style-type: none"> <li>• Interview</li> <li>• Observation</li> <li>• Steering Committee</li> </ul>
P.9	Strategic Initiatives Lead	Ireland	Professional Services	30yrs +	Growth Markets	<ul style="list-style-type: none"> <li>• Observation</li> <li>• Steering Committee</li> </ul>
P.10	Strategic Initiatives Lead	Ireland	Professional Services	30yrs +	Global	<ul style="list-style-type: none"> <li>• Interview</li> <li>• Observation</li> <li>• Steering Committee</li> </ul>

**APP 2: Interview Questions**

<i>(1) What level of governance is required to ensure strategic initiative and project management alignment?</i>	
A.	Who is involved in decision making? How often do they meet?
B.	What is the current governance framework used? Requirements gathering/review/sign-off?
C.	Are there a set of agreed criteria/principles used in decision making regarding project management approach and fit for initiative?
<i>(2) What role does organisational culture play in implementing project management approaches and strategic initiative alignment?</i>	
A.	What type of org structure is in place? Hierarchy?
B.	How do you find the organisations willingness to adapt to change?
<i>(3) How are communications and change management systems utilised to connect project management and strategic initiatives?</i>	
A.	What systems are currently used to share knowledge?
B.	Do you find them effective and why?
C.	Do you have suggestions/recommendations on how they could be used or implemented?
<i>(4) What quality assessment processes and procedures are in place and required; to identify and review appropriate project management methodology?</i>	
A.	What project management frameworks are in use?
B.	How is the approach determined?
C.	Who are the key decision-makers?
D.	Are there designated quality assessors?
E.	Would you consider your organisation a learning organisation? Why?

**APP 3: Group Breakdown Table – Views on Technology Communications**

<b>Group One</b>	<b>Group Two</b>	<b>Group Three</b>
Integral to the process pre and post COVID	Good alternative to traditional communication.	Technology as a workaround in interim, no long-term solution
Rigorous communication technology solutions in place and use	Quick to adapt and implement due to change in environment	Waiting until things go back to “normal”
Teams located across geography and continents	Co-located teams in Ireland and other Geographies	Co-located teams in Ireland only
Managed and led from Ireland	Managed and led from Ireland or another Geography	Managed and led from Ireland only
Participant Refs: <ul style="list-style-type: none"> <li>✦ P.5</li> <li>✦ P.6</li> <li>✦ P.7</li> <li>✦ P.8</li> <li>✦ P.10</li> </ul>	Participant Refs: <ul style="list-style-type: none"> <li>✦ P.2</li> <li>✦ P.3</li> <li>✦ P.9</li> </ul>	Participant Refs: <ul style="list-style-type: none"> <li>✦ P.1</li> <li>✦ P.4</li> </ul>

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