

## ***Advances in Project Management Series<sup>1</sup>***

### **Strategy as learning to discover the way forward**

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The term *strategy* appears to be amongst the 1,000 most commonly used words in the English language (EF, 2017), particularly in a business context; yet it can still have a multitude of alternative meanings. The Oxford English Dictionary defines strategy as: ‘*a plan of action designed to achieve a long-term or overall aim*’; whilst also offering an alternative definition as ‘*the art of planning and directing overall military operations and movements in a war or battle*’. The Cambridge English Dictionary meanwhile offers a single, more all-encompassing definition in the form of ‘*a detailed plan for achieving success in situations such as war, politics, business, industry, or sport, or the skill of planning for such situations*’.

The most common definitions of strategy found in the literature include the following:

*‘The determination of the basic long-term goals and objectives of an enterprise, and the adoption of courses of action and the allocation of resources necessary for those goals.’* (Chandler, 1962; p. 13)

*‘Essentially, developing a competitive strategy is developing a broad formula for how a business is going to compete, what its goals should be, and what policies will be needed to carry out those goals.’* (Porter, 1980; p. xvi)

The definitions above, while emerging almost two decades apart, point to a few essential themes:

- Strategies focus on the (long term) future and the goals that can be reached as part of that future
- Strategies determine the goals and objectives that will be pursued
- The key concern is around the achievement of these goals
- Resources are therefore allocated, and actions carried out, specifically in order to enable the actions required to facilitate the goals
- Business environments are competitive, implying that some organisations will fare better while others may not succeed

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<sup>1</sup> The PMWJ *Advances in Project Management* series includes articles by authors of program and project management books published by Gower in the UK and by Routledge publishers worldwide. Each month an introduction to the current article is provided by series editor **Prof Darren Dalcher**, who is also the editor of the Gower/Routledge *Advances in Project Management* series of books on new and emerging concepts in PM. To see [project management books published by Gower and other Routledge publishers, click here](#). Prof Dalcher’s article is an introduction to the invited paper this month in the PMWJ.

- Consequently, given the focus, long term impact and competitiveness, determining the strategies is a critically important and defining function of top management

The term strategy has been in use for centuries. Bracker (1980; p. 219) identifies the etymological origin of the word, from the Greek *Strategos*, “a general”, which in turn, comes from roots meaning “army” and “lead”, as befitting the second definition offered by the Oxford Dictionary.

*‘The Greek verb stratego means to “plan the destruction of one’s enemies through effective use of resources”. The concept of strategy in a military or political context has remained prominent throughout history, and has been discussed by such major writers as Shakespeare, Montesquieu, Kant, Mill, Hegel, Clausewitz, Liddell Hart and Tolstoy.’ (ibid.)*

Carter, Clegg and Kornberger (2010; p. 2) observe that the idea of strategy can be traced back to the early writings on military strategy by Sun Tzu, whose work, *The art of war*, is often said to mark the birth of the discipline. Other military tacticians expanded on the idea of the strategy of war.

*‘Strategy is the employment of the battle to gain the end of the War; it must therefore give an aim to the whole military action; in other words, Strategy forms the plan of the War, and to this end it links together the series of acts which are to lead to the final decision, that, is to say, it makes the plans for the separate campaigns and regulates the combats to be fought in each.’ (Von Clausewitz, 1940; p. 79)*

Given the competitive nature of the business environment and the need to succeed in the long term, business schools appear to have extended the war analogy and adopted the notion of competitive strategy, replacing the adversarial enemy, with the seemingly less sinister, yet equally cunning, cold and calculating entity known as business competition.

### **Strategy from the top down**

Cummings and Wilson (2003; p. 14) concede that because corporate strategy was conceived in the middle of the Twentieth Century, it was fashioned around the prevailing images and understanding of science typical of that era. They caution that Chandler’s classic definition of strategy – see above – is premised upon his hierarchical view of the organisation as composed of successive layers of top management, middle management, lower management, supervisors and so forth.

The prevailing approach resulting from Chandler’s position is that strategy formation is about achieving the essential fit between internal strengths and weaknesses and external threats and opportunities (Lampel et al. 2014, p. 21). Indeed, according to Chandler, strategy is the result of smart decisions that seek to achieve a fit between market opportunities and organisational structure, with the detailed analysis resulting in a new conceptual object – *‘the strategic plan that drives, dominates and determines organizational structure’* (Carter et al., 2008; p. 22). In other words, strategy takes primacy: Having defined the best possible strategy, companies could then determine the most appropriate organisational structure to achieve it (Crainer, 2000).

*'To this day strategy is subsequently seen by textbooks as management at the highest, overriding and most detached level 'the planning, directing, organizing and controlling of a company's strategy related (i.e. higher level and longer term) decisions. The geometrical image upon which this view was based was fleshed out by Igor Ansoff.'* (Cummings & Wilson, 2003; p. 14)

Igor Ansoff, authored the first complete book dedicated to corporate strategy (1965) and is considered to be the father of modern strategic thinking (Hindle, 2008; p. 215). Strategic planning was therefore further enacted through Ansoff's rational planning approach, predicated on the gap analysis, identifying the mismatch between where you are and where you would like to find yourself. He also formalised the process through detailed analysis of copious amounts of data about the past in order to predict the future. Ansoff developed an elaborate model that ultimately led to claims of 'paralysis by analysis' and incidents of strategic planning failure.

### **The long-term impacts of hierarchical organising**

Ansoff himself subsequently reflected that *'in retrospect, the incidence of strategic planning failure should not have been surprising. After all, it was a practical invention designed by staffs in business firms as a solution to a problem which was poorly understood, and in the absence of a theory which could have guided design'* (reported in Crainer, 2000; p. 128).

Nonetheless, in Ansoff's view (1965, 1968, 1987), strategic action was concerned with controlling the relationship with the environment. Top management would therefore become primarily concerned with the formal process of planning, control and monitoring of the correct realisation of strategic plans.

*'(Ansoff) advocated a classic rational planning approach to strategy. It was to have a strong influence in areas such as project management in the construction industry and the large-scale engineering and exploration projects in the oil industry. It contributed directly to the canon of the project management body of knowledge. In this respect it follows on from the direction that F.W Taylor set at the birth of management.'* (Carter, Clegg and Kornberger, 2010; p. 24)

The writings of Ansoff and Chandler reflect a classical view that enshrines a linear-hierarchical dimension concerned with developing a rational, accurate and objective depiction of the environment. This is meant to allow for careful positioning of the organisation to maximise efficiency and determine specific strategic moves and directions. The view accounts for the growing popularity of steep hierarchies which began to appear in 1880s and 1890s as railroad and telegraph companies required extended management structures to account for the growing geographical spans covered by their companies (Chandler and Daems, 1980; p. 3). Indeed, in these companies, *'the visible hand of managerial direction has replaced the invisible hand of market mechanisms ... in coordinating flows and allocating resources in major modern industries'* (ibid.; p. 9).

To achieve economies of scale, the firms organised their management ranks to coordinate high volume production with national and international distribution (Savage, 1996). As the firms expanded, they employed medium- and top-level managers to optimise their operations. With work divided amongst the different functions, different sub-sections became specialised with new policies, procedures and routines created by the cadre of new managers that had to be recruited to maintain and control the individual silos. An ironic side effect of this growth was *'a division and subdivision of management that paralleled Adam Smith's earlier concept of division and subdivision of labour, especially with respect to two key features: sequential work and narrowly defined tasks'* (Savage, 1996; p. 149).

The division into distinct areas made it easier to control and monitor the capital resources of the firm, albeit in a functional fashion. However, it also required new mechanisms and systems to support the resulting differentiation of the functions and the need for integration to manage and direct linked and strategic activities. Structure often becomes a key-integrating stimulus, or need, across an organisation. Accordingly, the division also reinforced the need to manage portfolios of initiatives at an enterprise level across the entire organisation, and the necessity for more complex cross-functional integration in programmes and major change initiatives, which span and impact multiple turfs and jurisdictions.

As noted above, Chandler and Ansoff hierarchical structures were deeply influenced by Taylor's direction. Fredric Taylor's conception of scientific management asserted that in order to improve efficiency, managers were required to do all the thinking related to the planning and design of work, leaving workers with the task of implementation, resulting in a clear separation between planning and doing (Dalcher, 2017; p. 4). The principle of separating the planning and design from execution, and the intended desire of freeing the workers from the need to think, flow naturally from the desire to simplify tasks, improve efficiency and throughput, reduce waste and increase monitoring and control. They are also responsible for many of the dysfunctional aspects of life cycles and work schemes that we still encounter nowadays. One side effect of Taylor's approach was the replacement of skilled craftspeople, with unskilled workers only trained to do specific tasks in prescribed ways (ibid.; p. 5) resulting in the loss of valuable expertise, motivation, responsibility and professional judgement.

*'Ansoff's influence is echoed in modern management thinking that understands those at the top as the strategic thinkers of the organization, seeing their task as defining the big picture, steering the organization with a strong grasp, whereas the lower levels of the hierarchy realize and implement what they have been told but which they could never see – because they are outside the corporate elites who set the strategic vision.'* (Carter, Clegg and Kornberger, 2010; p. 24)

At a micro-level, the tendency to separate the layers of management and move the strategic planning upstream, left project managers devoid of strategic insight and wisdom and bereft of involvement in the early phases of the project. This would account for the apparent separation and isolation of project management as reflected in the more traditional bodies of knowledge. Such bodies were thus able to rely on the appearance of

pre-defined chunks of work that could be operationalized through the allocation to project managers to complete the delivery aspects of the project.

So what might be the residual impact of upfront, hierarchical planning, the division of management and the separation of thinking and doing? Moreover, given the identified changes, what kind of models and images might be needed to control and manage in such environments?

### **Getting lost without a compass?**

Karl Weick (1987, 1995) tells a powerful story about a Hungarian military detachment stranded on manoeuvres in the Alps, which is paraphrased below:

The Young Lieutenant in charge of the detachment, orders a reconnaissance unit into the icy wilderness beyond their camp. Immediately, as the unit departs, it begins to snow, with a significant snowstorm continuing unabated for a further two days.

The unit fails to return and no further contact is established, leading the young officer to regret that he may have condemned his own soldiers to their death.

However, on the third day, the unit returns to the camp leading to many questions: What has happened? Where had they been? How did they survive? How did they make it back?

The soldiers report that they considered themselves lost and waited for the end. They did not have any maps, compasses or any other equipment with which to ascertain their current position. The constant heavy snow made it impossible to retrace their steps, identify any landmarks, or plot a potential route back.

However, as they were preparing themselves for their unhappy demise, one of them reached into a seldom-used inner pocket and discovered an old crumpled map.

The discovery calmed them down and they quickly started to pitch a shelter, with the knowledge that they could now return to base. After the storm, they took out the map and discovered their bearings.

The map did not quite fit the terrain, but they were able to establish their position. They followed the map down the mountain and after taking a few wrong turns and retracing some of their steps, they made their way back to camp.

After the initial action comes further introspection. When the lieutenant examined the map more closely, he discovered to his astonishment that it was not a map of the Alps, but of the Pyrenees.

The story's appeal makes it extremely popular in courses that deal with strategy. Cummings and Wilson (2003; p. 1) note that the analogy is immediately recognisable as the value of the map, comes not just from the detail that it encompasses, but also from its ability to focus minds and help people commit to a particular course of action. The vignette

has been criticised by Mintzberg et al (1998), pointing out that navigation in mountain regions is considerably more difficult than the story implies, and by Basbøll and Graham (2006) for adding further embellishments and failing to recognise the original sources of the tale, including Holub's (1977) poem about the young Lieutenant.

Nonetheless, Weick (2006; p. 193) retorts that

*the story is a powerful allegory, offering an example 'that minimal structures, when trusted, updated and acted on attentively, tended to generate data that improved problem solving'.*

While the unit may have been lucky to survive by following the wrong map, the story emphasises the power of the process of *mapping*, as opposed to blindly following a map. Indeed, mapping and navigation provide the basis for a journey into less certain and less recognisable terrains, with a general goal or overarching purpose.

### **Strategy as emergent forward Planning**

The notion of rational planning may sound attractive at surface level and yet, while we have to acknowledge that it clearly underpins a lot of the thinking approaches, frameworks and techniques that are utilised in classical project management, there are alternative approaches devised for planning for less well defined and more uncertain perspectives.

In some situations top-down thinking delivered through boxes and lines predicated through prescriptive control and influence triangles can become hazardous. Indeed, Raynor (2007) identifies a strategy paradox, an ever-present, if little understood trade-off: Most strategies are built on specific beliefs and assumptions about an unpredictable future. Yet, the current approaches for defining and implementing strategies demand a single strategic commitment, thereby constraining leaders to an inflexible and irreversible course of action. The trade-off between early commitment and latent uncertainty can bind organisations to a particular course of action, and stop them from adjusting and adapting to emerging circumstances.

Mintzberg (1994; p. 108) introduces a distinction between strategic planning – which has been practiced as a form of strategic programming, the articulation and elaboration of strategies, or visions, that already exist with the support of analytical techniques – and strategic thinking. In his view, strategic planning models failed because they overemphasised quantitative analysis, whilst failing to offer an opportunity to synthesise experience, intuition and creativity. Strategic planning is therefore best suited to follow the more creative acts of strategic thinking and vision development. Mintzberg identifies three fallacies (ibid., p. 110,) which underline the fundamental shortcomings of strategic planning:

- **Prediction fallacy:** That *prediction is possible* (and by implication that the world holds still while we predict and plan; and that the past provides a good indication regarding the future)

- **Detachment fallacy:** That *strategists can be detached from the subjects of their strategies* (this talks to the idea that strategies are detached from operations, and thinkers are separate from doers, which might work in deep hierarchical silos, however, it is likely to fail in practice as managers seek additional autonomy), and, above all,
- **Formalisation fallacy:** That *the strategy making process can be formalised* (and thereby implying a rational, programmable sequence)

Undoubtedly, contingency also plays a part. Mintzberg (1990) offers a more organic view of organisations, pointing out that high complexity and fast rates of change necessitate emergent strategies. In contrast, relatively stable situations, with low levels of complexity and uncertainty may benefit from a top-down approach. However, as the environment becomes messier, more turbulent, and uncertain, the process of defining a strategy becomes more experimental and driven from the bottom up as new insights and learning emerge from interactions and discovery. Under such conditions strategy becomes more of a learning process than a pre-defined state. In recognising the existence of different schools and positions, Mintzberg (1994) therefore concludes that strategy can be either an emergent pattern or a deliberate perspective.

Returning to the world of military strategy and the writing of Von Clausewitz (1874/1940) reveals a similar sentiment:

*'As these are all things which to a great extent can only be determined on conjectures some of which turn out incorrect, while a number of other arrangements pertaining to details cannot be made at all beforehand, it follows, as a matter of course, that Strategy must go with the Army to the field in order to arrange particulars on the spot, and to make the modifications in the general plan, which incessantly become necessary in War. Strategy can therefore never take its hand from the work for a moment.'* (p. 79)

Yet, von Clausewitz appears less keen on the idea of separation between planning and doing:

*'That this, however, has not always been the view taken is evident from the former custom of keeping Strategy in the cabinet and not with the Army, a thing only allowable if the cabinet is so near to the Army that it can be taken for the chief head-quarters of the Army.'* (ibid.)

The writing appears to acknowledge the role of bottom up emergence of strategic details through learning, adjustment and sensemaking. Undeniably, this idea chimes with Mintzberg's findings that the interaction critical to strategy occurs between the operational base of the organisation and the environment, rather than between senior executives and the outside world. Instead of coming from the top, a fair amount of real strategy emerges bottom-up.

Strategies, much like maps, can provide a means of orientation, and a basis for making decisions and taking action. They also appear to provide added confidence and perhaps an early glimpse of the future orientation needed for any successful journey.

## **Going on a strategy journey**

This month's guest column is written by David Booth and is based on his recent book *Strategy Journeys: A Guide to Effective Strategic Planning* published by Routledge. David recognises that strategic planning can invoke a variety of different responses, including the potential for angst, apprehension and fear. Whilst acknowledging that strategic planning suffers from a bad press, he also reflects on the prominence of strategy courses in the most prestigious MBAs and business schools, thereby identifying a mismatch between the perceived value and the practical application. Despite the plethora of courses and resources related to strategic planning, many organisations still seem to struggle with the concept.

Booth's approach is to develop a much-needed pragmatic resource concerned with demystifying the strategy journey. The journey image recognises the exploration and discovery features as organisations endeavour to make sense of their position. Rather than promote standard methods and processes, the journey recognises that each organisation starts at a different starting point along an individual path to develop and improve. The journey allows each organisation to initiate its own exploratory adventure as it begins to think, reason, decide, communicate and adapt.

Booth introduces much needed reflection and pragmatism into the strategic planning space. He avoids the explicit prescription of methodologies and standards, preferring instead to familiarise and engage senior managers and executives. He is able to convey some of the more difficult aspects through an extremely effective use of diagrams and figures. The diagrams bring the life cycle of a strategic plan to life allowing executives to assess the impacts of actions such as refreshing the plan, charting the realised versus the intended strategy, and evaluating the impact of changing contexts.

The stance of the work recognises the contingency of each particular context, thereby allowing for deliberate as well as emerging approaches. The openness to contexts, situations and decisions enriches the discussion and enables executives to grasp a fuller set of potential circumstances and implications.

Overall, the work makes an important contribution to strategic planning, not least by focusing explicitly on the strategy journey. The latter part of the journey enables the strategy to inform the themes that lead to specific initiatives. Even more intriguingly, a change energy model is offered to identify the impact of change against the effort and the critical momentum needed in order to deliver the expected benefits. Engagement, stakeholders and culture also receive extensive coverage. The idea of a strategy journey provides a platform for action and offers an opening for beginning to address organisational learning in the context of strategic management and improvement.

## **Strategy reprised: In search of a revolution**

Strategy requires learning, development and adaptation. Gary Hamel (1996) notes that unusual times call for unusual strategies. Recognising, that incremental improvement appears to have reached the boundary of incrementalism where additional investment no



longer justifies the benefits, he instead agitates for revolutionary strategy, offering a set of ten principles that can help liberate its revolutionary spirit and dramatically increase its chances of discovering truly revolutionary strategies. The principles are paraphrased (cf. *ibid.*, pp. 70-82) below:

1. **Strategic planning isn't strategic:** It needs to move from a reductionist calendar-driven ritual based on simple rules, to an exploration of the potential for revolution: Discovery and playful exploration are key.
2. **Strategy making must be subversive:** If there is a hope for revolution, there needs to be a challenge: always question what is taken for granted.
3. **The bottleneck is at the top of the bottle:** In most organisations it is senior managers who protect the old order and only have experience of the past: Replace the hierarchy of power, with a hierarchy of imagination.
4. **Revolutionaries exist in every company:** Many middle managers strain against industrial orthodoxy, but their voices are often muffled by defensive layers of bureaucracy: Let them be heard: If they do not challenge the company from within, it will ultimately be challenged from the outside.
5. **Change is not the problem, engagement is:** change cannot be imposed on people: The objective is not to get people to support change but to empower revolutionaries and give them the responsibility for engendering change. Create a discourse about a potential future and encourage commitment.
6. **Strategy making must be democratic:** The capacity to think creatively about strategy is distributed widely in an enterprise: Be flexible, break norms, cast the net wide, and include young people, outsiders and those on the margins: For your measure of success, learn something new from a 25 year old.
7. **Anyone can be a strategy activist:** Give revolutionaries a voice and the space to speak, involve the crowds, and transform potential anarchists into passionate and energetic advocates.
8. **Perspective is worth 50 IQ points:** Look at the world in new ways to discover opportunities: Make people see with fresh eyes: Change perspective, lens or viewpoint.
9. **Top-down and bottom-up are not the alternatives:** It is not an either/or: top-down will achieve unity of purpose, bottom-up can offer diversity of perspective, so, the strategy making process must involve a diagonal slice of the organisation that is both deep and wide.
10. **You cannot see the end from the beginning:** A process that involves a broad cross section, delves into the discontinuities and competencies, and encourages employees to escape typical conventions will almost inevitably reach surprising results: If you open a dialogue and ignore the outcome, you will poison the well: The new will follow new rules

and lead to a future that cannot be foreseen as it unfolds when people begin to experiment and explore new avenues: It will also absolve the need to sell the strategy and result in buy-in and engagement.

The revolutionary principles offer guidelines for a new and exciting strategy journey that endeavours to take every one on board. Inviting new voices, new perspectives, and new conversations will enrich the range of options and make the journey more stimulating and informative. French post-imperialist painter, Paul Cezanne quipped that '*the day is coming when a single carrot, freshly observed, will set off a revolution*'. As we experiment, discover and engage in our revolutionary strategy journeys, we need to be able to break away from old habits and established coalitions, and instead engage a wider constituency in the continuous pursuit of fun experimentation, active curiosity, invited change and cherished improvement to the ultimate betterment of all.

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*Editor's note: Editor's note: Prof Darren Dalcher is the editor of the Gower/Routledge Advances in Project Management series of books on new and emerging concepts in PM. The PMWJ Advances in Project Management series includes articles authored by Routledge book authors; the above article is an introduction to the invited paper this month by another Routledge author. [To see recent project management books published by Routledge, click here.](#)*

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Professor Dalcher has written over 150 papers and book chapters on project management and software engineering. He is Editor-in-Chief of *Software Process Improvement and Practice*, an international journal focusing on capability, maturity, growth and improvement. He is the editor of the book series, *Advances in Project Management*, published by Routledge (formerly Gower Publishing) and of a companion series *Fundamentals of Project Management*. Heavily involved in a variety of research projects and subjects, Professor Dalcher has built a reputation as leader and innovator in the areas of practice-based education and reflection in project management. He works with many major industrial and commercial organisations and government bodies in the UK and beyond.

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