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**The “Expedition” as a new mental model for managing business projects
– learning with Christopher Columbus**

Markus Koerner¹

(Agora Associates, 8117 Faellanden/Zurich, Switzerland,
www.agora-associates.com, mk@agora-associates.com)

1. A NEW CHALLENGE: “BUSINESS PROJECTS”

PROJECT work in many companies nearly exclusively deals with engineering and IT. The ‘project community’ comprises mainly full-time professionals who are involved in a series of projects. The ideal of project implementation is the classical project management methodology as embodied by IPMA Competency Baseline and PMBoK. ‘Business’ merely acts as the sponsor or client of projects.

However, project management is now increasingly applied to domains such as marketing, business process improvement, strategy development and implementation, product development, mergers and acquisitions and corporate networking. These projects are often labelled ‘business projects,’ where ‘business’ refers to line managers or professionals in line functions. This still on-going trend has created a new situation for project work.

Specifically, there is a new ‘business’ project constituency whose members have a different perspective on project work. Project work for them is more of an exceptional challenge. The ‘business’ project constituency’s credo is to get on with their project, but at the same time to minimise the disturbance of their on-going operations, as well as the costs of learning and adjusting to new ways of doing things.

In this light, it doesn’t come as a surprise that ‘business’ often feels badly served by traditionally oriented project management experts and classical project management methodology. Often, classical project management makes project work unnecessarily complicated and heavyweight for today’s ‘business’ applications. A more nimble and flexible approach is needed. The following general observations support this point:

- a low degree of application of project management methods to business projects
- a rather low esteem of many line managers for project management as a discipline
- compared to the ‘lean business’ principles that are the staple of today’s management curriculum, classical project management methodology looks complex and cumbersome - just note the forty-four ‘processes’ distributed

over five ‘process groups’ and nine ‘knowledge areas’ described by the PMBoK.

1.1 *The problem*

The above call for a more nimble approach will not come as a surprise to many practitioners of project management. “Of course,” they will say, “to simplify the approach you need to be *pragmatic* and select only those tools and practices that are relevant for your kind of projects.” The problem with this is: pragmatic choices depend on circumstances, and more than anything else they depend on personalities. In practice, then, for business oriented project work there seem to be as many variations of ‘project management’ as there are trainers or consultants. Some see project management mainly as an issue of team work. Others equate it with an application of MS Project for task scheduling. Others, again, simply pick a few classical core tools: project charters, Gantt-Charts, and progress control at task level.

This panoply of solutions puts those who are working on developing capabilities for project work in a difficult situation. These are the project management educators and trainers working in project excellence centres, in HR, and in staff departments. They find themselves oscillating between heavyweight classical methodologies, on the one hand, and highly specific and local solutions that are difficult to roll out across various functions of the company, on the other. A stronger basis on which to build company wide, long-term capability development initiatives for managing business projects is required.

1.2 *Requirements for a solution*

To build business project management competencies at company level, we need a contemporary, business-oriented and nimble project management approach to complement the engineering-led, and often heavyweight classical methodology. More specifically, we need to:

- develop a generic project model that simplifies business projects in an appropriate manner, emphasising organisational innovation and change as key concerns of business-driven projects
- describe a core set of business project management functions and related capabilities (skills, tools, processes)

¹ Manuscript received February 27, 2007. **Markus Koerner** (1962 -), male, Director AGORA Associates, M. Sc. Sociology (Univ. Bielefeld), (e-mail: markus.koerner@agora-associates.com)

- allow for scalability; business project managers should be in a position to flexibly decide to which extent project management – as opposed to general management practices - shall be applied to a particular situation (in line with the Pareto principle: 20% of a system’s capabilities account for 80% of its output).

More generally, again, we need a new way of presenting the issue of project management to the new ‘business project constituency’. Required is a new ‘mental model’ – a conceptual approach that provides a sound structure to the theme of managing ‘business projects’ and that acts as a conceptual anchor for communicating about it. A *novel* concept and terminology are needed because:

- Line managers and others who come from outside of the classical project community should immediately grasp that this *is* a new approach, different from the often dreaded classical project management
- Experts within each firm’s established project community should understand that managing business projects in many aspects *is* quite different from the project management they know and they feel comfortable with; to help in the management of business projects, they should ready themselves to learn new tricks, even if many of them are ‘old dogs’
- Classical project management was and is mostly targeted at engineers – a group of people with often above-average intellectual skills who derive much pride from their ability to grasp complex issues and who are at ease with the rather technical and complex manner in which project management methodology is presented. But line managers are often much more pragmatic. They value simplicity highly. For them, a ‘new’ approach must pass the elevator test: “can you please make this clear to me in sixty seconds?”

This is not a critique of classical project management. When it comes to large engineering or systems development and deployment projects, it is difficult to better the thorough application of classical project management methodology. Rather, project management to some extent has become the victim of its own success: Project management is being rolled out to more and more areas of application for which it was not intended in the first place.

2. THE SOLUTION: “PROJECTS AS EXPEDITIONS”

This paper tests the hypothesis that the metaphor “(business) projects as expeditions” provides a solution to the above mentioned problem. First, we will establish the fundamental credibility of the metaphor: do expeditions and projects really share key attributes? Then, I will explore the implications of looking at business projects as expeditions, using a well-known example: Christopher Columbus’ discovery of America. I will look into major project management themes in light of the metaphor: managing the commission, time management, preparing for and delivering results, stakeholder management, and leadership. In conclusion, I will evaluate to which extent the meta-

phor ‘projects as expeditions’ satisfies the requirements set out above.

2.1 Expeditions and projects

What is an ‘expedition’? The word itself stems from the Latin word *expeditio*, and it is used in all Roman and Germanic as well as some Slavic languages. According to Wikipedia, an expedition is “a journey undertaken for a specific purpose, usually exploration and/or research.” One must of course add: warfare. But there is no scientific or in other ways standardised definition, although the various definitions found are mostly congruent.

Regarding the meaning of ‘projects’, we may use a popular definition as a guideline: “projects are activities that cannot be addressed within the organisation’s normal operational limits; they are unique; they have a specific objective and they are terminated after they have attained it.”²

Now, do expeditions share these attributes of projects? The answer is positive. First of all, they require an organisation to be established. Expeditions are usually commissioned by organisations - the King’s court, the army, or the American National Geographic Society (which has commissioned more than



7000 expeditions). In contrast: When the first hordes of humans where travelling on their quest for fire, they were simply trav-

² PMI, A Guide to the Project Management Body of Knowledge, 3rd Edition

elling. Expeditions require an extra effort that goes beyond normal operations: buying cigarettes across the road will never qualify as an expedition, no matter how dangerous the crossing. Expeditions are unique: the discovery of a continent cannot be repeated. Mount Everest has been conquered by multiple expeditions – but each of them was still unique: either, different people were part of them, or different access routes were used. No doubt that expeditions have a specific objective – and there will always be a judgement whether it was successful or whether it failed. Also, expeditions are terminated after they have reached their objective, or when this objective has been given up. An ‘on-going expedition’ is a self-contradictory notion.

2.2 Managing the commission

Having established the general validity of the metaphor, we will look at its added value: What makes expeditions ‘special’ projects? And what do we learn about managing business projects when we look at them through the lens of the metaphor?

Columbus set out to discover the Western route to India. It took him a full eight years to find a sponsor – in the event Queen Isabella of Spain. He hailed from Genoa in today’s Italy as Cristoforo Colombo, but he couldn’t find an ear with the rulers of the town, whose primary concern was the struggle with the Ottomans in the Mediterranean. He went to Portugal, became Christoval Colom, then to Spain, became Cristóbal Colón, sent his brother Bartolomeo to King Henry VII of Britain and to the French Emperor Charles VIII, and was rejected time and again. He spent years studying the archives and struggling with committees. While at that time it was accepted wisdom that the earth was a sphere, the dominant belief was that the Atlantic Ocean would be too wide for a crossing. His astounding idea was that by sailing westwards, it would be much easier and more comfortable to reach India than by the newly discovered route around Africa. But, to establish this route, one would have to do something unheard of in his times: rather than to explore the world by travelling along the coast line of known continents, one would have to travel *straight across unknown waters*.

To break with the existing paradigm is often quoted as the most difficult part of managing a business project. The project goes against long-held beliefs, vested interests reinforce the power of the established paradigm, and competing theatres of conflict make it difficult to get enough attention for it. There is also a certain amount of courage required – who is ready to bet his career on an idea that is inconceivable for many? Columbus pursued his vision single-mindedly – and he skilfully avoided making his nationality an issue in an era of strong competition between the European powers. Likewise, a new business idea will often require its champions to leave established identities and ways of doing things behind them.

There was an inherent contradiction between the motives of Columbus as the project manager and those of his sponsors. Columbus wanted to discover a new important route for trade.

This was, in the first place, a quite technical idea, which fully exploited the scientific state of the art (as he saw it). Columbus was also interested in wealth and, possibly above all else, status – becoming known as the discoverer of that route. However, his sponsors had only one thing on their minds: gold. This difference largely explains while the exploitation of the newly discovered lands became a contentious issue and quickly discredited the whole enterprise.



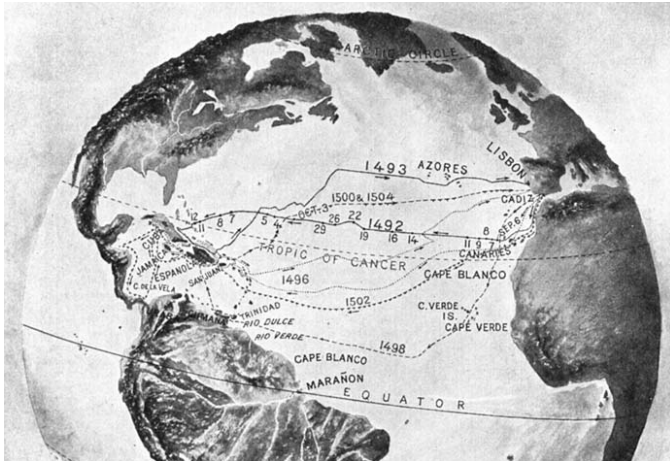
In many business projects we see a similar situation:

each participant is driven by his own vision and motives, and these are quite different from each other. Many a business project is built on a bright technical or operational idea, only to see this initial idea being overwhelmed by other interests. Business project managers must be able to constantly satisfy overarching goals: What ‘gold’ was to Columbus would be ‘shareholder’ value to many of today’s business project managers! At the same time, projects must deliver benefits at the operational level; and they must make the project a worthwhile enterprise for a core group of committed individuals who personally take charge to make it happen.

Other important parallels between expeditions and business projects appear when we examine how objectives are presented: They must be simple, if not simplistic. Would Columbus have been able to convince his sponsors if he had promised them an unknown continent - ‘America’ - rather than India? Business projects as well as expeditions promise a lot, and typically more than can be realised. The full implications of what happens if and when the project is realised and its objectives are attained only become clear after a while: Columbus was quite successful in opening a new route across the Atlantic; round trips became routine quickly after his first trip. But the promised land – India – was somewhere else, and so were its riches. At his time, the idea of reaching ‘India’ was so important that the much bigger event – discovering a whole new continent no-one had ever thought about! – initially went unnoticed. Columbus himself lived in denial to the end of his life, speaking of ‘India’ even when it became quite clear that there was very little resemblance between what he had expected – and promised to others – and the real thing.

It is difficult to miss the parallels with many of today’s larger M&A projects, or the current fashion with Six Sigma / Lean Sigma. These refer to promised lands, but their results are often comparatively modest; typically, a lot of energy will be spent

on explaining auxiliary and complementary benefits that would replace the original goal. Business projects and expeditions may have ‘simplistic’ objectives, but people are committed to them because of highly specific and complex notions of added value that they expect from these projects.



2.3 Time management

Columbus needed to overcome strong resistance against his radical proposal. He took it as a challenge and managed to find other ways to get by as he constantly pushed his issue with potential sponsors. He undertook smaller expeditions, e.g. to Africa, and built himself some wealth in trade. When he finally received the go-ahead, he didn't waver; and despite meagre resources and a press-ganged project team he set sail as early as possible. Similarly, many business projects need time to ‘ripen’ in an organisation, but then need to be launched before their window of opportunity closes again.

Like every project manager, Columbus had to astutely manage the timing of his mission. But like most managers of business projects, by himself he could only do so much to advance the issue. With adverse winds and weeks spent in the doldrums, he had to be patient, keep the morale, and teach his team how to use local opportunities for fishing and forage (so to speak). In business projects, too, the ‘winds’ often play an enormous role. Set sail with your project at the right time, catch the right wind – and your project will be as easy as Columbus' first voyage across the Atlantic, which was easy sailing all the way!

2.4 Preparing for and delivering results

Business projects, like expeditions, need good preparation. One needs the right equipment, protection, rights to travel through foreign waters, and the right people on board. Columbus' expeditionary force was quite small: only three ships with a crew of not more than 96 souls. But he had the best navigation equipment on board and he himself was considered to be one of the best navigators of his time. Business project managers often told me that they see the right set up as the single most important factor for success. At the same time, preparation and the best equipment and tools on board only help an expedition to master the dangers and challenges that were anticipated. Every expedition reaches a point from where

there is no help available, and the team must make do with resources and tools at hand. In business projects, I mostly experience a similar issue: however smooth the journey, at one point, the project will be challenged – and despite so many arguments what others could and should do for the project, the only real option the project has is to help itself.

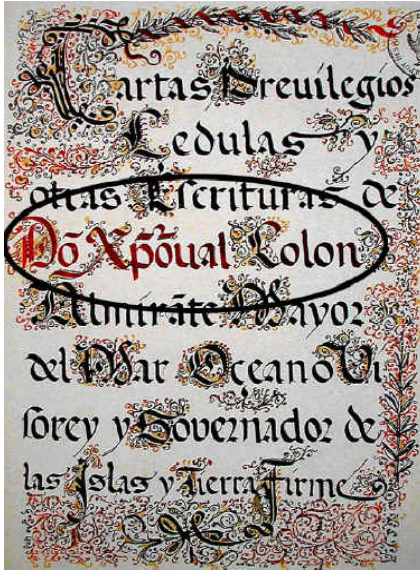
Columbus had promised Queen Isabella to deliver to her the gold of India (... golden bridges, golden houses, as witnessed by Marco Polo - his Italian compatriot, whose stories were believed by only few people in Spain). Upon landing in the West Indies, he found that little gold was available. Hence, he tried to keep Queen Isabella happy by sending the only valuable ‘good’ he found: slaves. And he couldn't move on the ‘Indian’ mainland, because he needed to prove the value of what he had found by exploiting the islands to the extent possible. Eventually, the whole ‘discovering India’ project became a learning exercise, in modern parlance: Columbus and his sponsors realised that the original project idea had failed, but through practice new horizons and new opportunities had been opened. These new opportunities were used mercilessly, and the intended business model of ‘wealth through trade’ was replaced by the new business model ‘wealth through exploitation’.

Interestingly, Columbus turned out to be an inept project manager for the consolidation phase. Less than three years after Columbus had been ordained as the Queen's Admiral of India (still, then), war had broken out between various factions of conquerors, and confusion about the project's mission reigned. Columbus, who had so ably dealt with the greatest powers of his time, was incapable of governing a small colony of a few hundred settlers!

2.5 Stakeholder management

Stakeholder management was a critical element for the success of Columbus' mission. A key stakeholder was Alonso Pinzon, the owner and captain of one of the three ships, who had joined the project with his own ulterior but undisclosed motives. Soon after the first landing, Pinzon promptly disappeared with his ship. There is no doubt that he had tried to find gold by himself and to use this to dislodge Columbus from his position with Queen Isabella. However, Columbus couldn't bring undeniable proof for this and decided to work with him in an uneasy alliance for the entire project. Again, this may sound familiar to many of us who have worked in business projects: How many hours do we spend pondering about the motives of a powerful department head who suddenly supports a project? What kind of effort do we spend to assert us of his honesty – or, conversely, to enable us to bring proof of his failing his commitments?

Another important group of stakeholders were the Portuguese. Repeatedly, Columbus had to use their harbours and feared their interference. It turned out that they could be kept at bay – but only because they expected that the benefits of his project would eventually accrue to them. They were of the understanding that any land detected westwards of Portugal would belong to them, as agreed by the recent treaty of Tord-



esillas between the kingdoms of Spain and Portugal. This had, in deed been a huge gamble, both by Columbus and by his sponsor, Queen Isabella. Eventually, the Pope had to arbitrate between the two powers and his verdict came down on the side of Spain.

What we see here is a

typical situation also for business projects: operational gains may quickly be lost if the legal situation has not been clarified. But very often, this is precisely not possible.

Finally, there were the ‘Indians’. Officially, they were to benefit from the project because their heathen souls would be ‘rescued’ by making them good Christians. During the first weeks and months after the landing, Columbus indeed implemented a policy of partnership and fairness. Actually, he didn’t have any alternative to this approach, since his crew depended on the Indians for water and food. Soon after, however, the Indians found themselves thrown into servitude and slavery, miserly reduced by disease and starvation. Columbus failed them. One is tempted to ask this question for many a business project: who are its ‘Indians’?

2.6 Leadership

Columbus exercised strong leadership from the inception phase to the end of the initial project, his successful return to Spain. Nobody could doubt that he was wholeheartedly committed to the project, which he himself had conceived.

Above all, he was fearless in a calculated manner. Trusting his extensive knowledge of the geography of his time, he was ready to lead an expedition virtually into the void. Upon leaving for the first crossing, his ships had food and water for about five months of voyage on board. His opponents had predicted that crossing the Atlantic would last years, while he himself hoped for only a couple of weeks. Eventually, he brought his people across within eleven weeks of sailing. A couple of weeks more would have made death certain. His press-ganged crew was not at all committed to this cause. However, he repeatedly managed to avoid mutiny. He also used a ruse to maintain the confidence of his crew: when sailing westwards,



he manipulated the official records, giving the team the impression that they had travelled a far shorter distance than they actually had! However, when on their return from the first voyage the ships were caught in a storm, his only resort was to praying.

While in many business projects the stakes are not as high, taking a calculated risk is certainly a key element of leadership. Business project leaders also should know how to keep project teams involved. This is in many cases more difficult than it was for Columbus, for whose crew the alternatives were clearly cut: obedience, a successful mutiny or the sharks.

In consolidating the project’s initial gains, Columbus failed as a leader. His decisions regarding the arbitration between warring factions within his expeditionary force were inconsistent, and he soon became a victim of various intrigues. He didn’t manage to build a loyal group of followers that would have allowed him to consolidate the settlements. Business projects sometimes face a similar challenge: when do you take the project out of the hands of its champions and put it into the hands of those who can integrate its results smoothly into on-going operations?

3. CONCLUSION

The metaphor “projects as expeditions” appears to be both credible and useful. In comparing expeditions and business projects, we found stark parallels regarding key issues of project management: managing the commission, time management, preparing for and delivering results, stakeholder management and leadership.

Moreover, it appears that the metaphor “expedition” provides us with a simple, appropriate and generic model for business projects. It emphasises innovation and change – as well as the risks involved – as key concerns of business-driven projects. Using the metaphor, it is possible to describe a core set of business project management functions, and to discuss which tools, skills and attitudes will be appropriate under any given circumstances. Moreover, the metaphor “expedition” is highly evocative. Nearly every western-educated professional has a clear picture of the characteristics of expeditions. Messages that make use of this metaphor travel well and are easily interpreted with little risk of misunderstanding. Because “expedition” is an everyday term, “managing business projects as expeditions” is also highly scalable: one can use it productively even with an only partial understanding of either ‘expeditions’ or the ‘project’ at hand.

We may conclude that the metaphor “projects as expeditions” is a sound enough conceptual basis on which to build company wide, long term capability development initiatives for managing business projects, including training and coaching sessions.

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