

# Strategic planning characteristics applied to project management

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## Abstract

This paper examines the application of strategic planning characteristics from prior strategic planning research to project management. Drawing from prior research in strategic planning, strategic information systems planning and strategic manufacturing planning, this research combines strategic planning characteristics derived from a rational approach with a second set of adaptive characteristics to create a comprehensive model. The resulting “rational adaptive” approach is then assessed empirically to evaluate its relevance to PM and whether it is associated with increased project success. In addition, the “rational adaptive” approach is mapped to established PM tools/techniques. Findings indicate that PM is captured by varying degrees of a rational adaptive approach, which is positively correlated with PM success and use of PM tools/techniques. These results suggest that strategic planning characteristics can be effectively incorporated into a generalized PM framework, yielding potentially useful insights regarding the relationship of PM behaviors to eventual project success.

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## 1. Introduction

The use of projects in organizations has increased steadily over the last several decades. Although there has been some indication that projects are becoming more successful, there is still evidence that a substantial number of projects do not meet goals or expectations (Allen et al., 2014). McKinsey and Company (2012) found that, on average, large information technology (IT) projects “run 45 percent over budget and 7 percent over time, while delivering 56 percent less value than predicted.” The Standish Group’s CHAOS Project, which tracks IT projects over time, shows limited progress in successful project completion over the last two decades. (<http://www.standishgroup.com>).

With this increasing use of projects yet limited project success, examination of PM success and failure continues to be an area of considerable interest (Allen et al., 2014). Leybourne (2007) reviewed the changing emphasis of PM research, recognizing a number of areas that have been examined in the past: identification

of critical success factors, evaluation of specific PM methods, and assessment of PM tools/techniques. Although findings from such studies have certainly contributed to the PM field, the research has been limited to a narrow set of constructs. As Leybourne (2007) discusses, it may be time to move beyond them.

Several authors have pointed out the lack of theoretical underpinnings in PM research (e.g., Drouin and Jugdev, 2014; Killien et al., 2012; Parker et al., 2015; Patanakul and Shenhar, 2012) recommending application of theory from related disciplines to advance PM as a field. Drouin and Jugdev (2014, p. 64) state that use of existing theory and constructs will “foster credibility of the findings” but the “current state of theoretical evolution in PM hampers researchers in using well-developed concepts to investigate by operationalizing constructs with existing valid and reliable instruments or items from instruments.” Examples of such research are studies by Drouin and Jugdev (2014), Killien et al. (2012), and Parker et al. (2015), which adapted the resource-based view from the strategic management field within a PM context.

The current study applies strategic management theory—specifically, strategic planning characteristics (SPCs)—to develop an expanded and more generalized PM approach. The research

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combines SPCs derived from a formal (“rational”) approach to strategic planning with a second set of adaptive SPCs to create a comprehensive model. The resulting “rational adaptive” approach is assessed empirically to evaluate its relevance to PM and whether it is associated with increased project success. In addition, the “rational adaptive” approach is mapped to established PM tools/techniques. Findings indicate that PM is captured by varying degrees of a rational adaptive approach, which is positively correlated with PM success and use of PM tools/techniques. These results suggest that SPCs can be effectively incorporated into a generalized PM framework, yielding potentially useful insights regarding the relationship of PM behaviors to eventual project success.

The paper is organized as follows. [Section 2](#) reviews the relevant PM and strategic planning literature and develops the conceptual framework for this study leading to articulated hypotheses. The research methodology is described in [Section 3](#) followed by the results of a practitioner field survey in [Section 4](#). Implications of research findings are discussed in [Section 5](#). [Sections 6 and 7](#) conclude the paper by summarizing contributions and limitations of this current study with suggestions for follow-on research.

## 2. Literature review

The PM process, its implementation through planning and execution, and relationship to project success is a continual focus of PM research. Acknowledging differences in context, it can be argued that the PM literature has striking parallels with strategic planning research, which examines the relationship between how planning is done and the success of that planning process. In this section, a brief discussion about prior research on PM is followed by an introduction of planning characteristics from the strategic planning literature and a discussion regarding the appropriateness of applying these SPCs within a PM context.

### 2.1. Project management

Prior research about PM has tended to focus on critical success factors, PM methods, and/or PM tools/techniques. Critical success factors (CSFs) are “characteristics, conditions, or variables that can have a significant impact on the success of the project when properly sustained, maintained and managed” (Milosevic and Patanakul, 2005, p. 183). Numerous CSFs have been identified in different studies. Fortune et al. (2011) found that “clear goals/objectives,” “realistic schedule,” “support from senior management,” and “adequate funds/resources” are the most frequently cited CSFs. Borman and Janssen (2013) found that CSFs can be related to the outcome, implementation process, or the operating environment of a project. Borman and Janssen (2013 p 397) found that although awareness of CSFs in these categories did impact a shared services project, “operating environment factors such as having a unified organizational structure are different again since they are unable to be managed or changed as part of the shared services initiative.”

Therefore, a number of previously identified CSFs may be outside the control of those involved in the project.

In contrast, research examining PM methods, which “provide guidelines and checklists to ensure that practices are being followed properly,” has a much narrower focus (Jugdev et al., 2013, p. 537). Methods generally have been derived from the different PM standards (e.g., *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*, 2008; *PM Guide 2.0*, 2010; *The APM Body of Knowledge*, 2006) and tend to be prescriptive in nature. Evaluations of PM methods have varied from one study to the next with mixed results for the relationship between PM methods and project success. Gowan and Mathieu (2005) examined 5 broad practices including problem identification, risk assessment, cost calculations, compliance planning, and testing and verification. Dvir et al. (2003) examined development of functional requirements, development of technical specifications, and implementation processes and procedures. And White and Fortune (2002), Fortune et al. (2011), and Jugdev et al. (2013) included methods based on the *PMBOK® Guide* (2008) and in-house methodologies. Almost all of these studies found a significant relationship between at least some of the PM methods and project success; however, it is hard to find a consistent pattern.

Numerous studies have also evaluated various project management tools and techniques. According to Jugdev et al. (2013, p. 537), “PM tools and techniques are intended to help practitioners do their job and to execute processes.” Besner and Hobbs (2006) examined 70 commonly recognized tools and techniques derived from the PM literature. Several studies have used *PMBOK® Guide* (2008) related tools/techniques (e.g., Crawford and Pollack, 2007; Ling et al., 2009; Zwikael and Globerson, 2004). There has been more consistency in the tools/techniques across studies than those found with PM methods. In one such case, Zwikael and Globerson (2004, 2006) developed artifacts based on *PMBOK® Guide* (2008) to examine the use of different tools/techniques, and these artifacts were later used by Papke-Shields et al. (2010). Another finding of this work was that widely used tools/techniques do not necessarily demonstrate the strongest relationship with success. Fortune et al. (2011) and Jugdev et al. (2013) extended work done by White and Fortune (2002) including both the use of tools/techniques along with PM methods, recognizing the relationship between them.

Consistent findings relating tools/techniques to a more generalized approach to PM suggest that this is potentially a productive area for further exploration and research. In addition, there have been a number of recommendations to apply research constructs and frameworks from related disciplines to create a theoretical foundation for advancing the field of PM. Projects are often initiated as part of a broader strategic planning process, thus the field of strategic planning would seem to be an appropriate source of ideas for planning and managing projects. Indeed, a review of the strategic planning literature reveals a robust framework and planning approach that corresponds to existing PM practices and that can be readily adapted to individual projects.

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