Which Came First – The Process Or The Tool?
By Gareth Byatt, Gary Hamilton, Jeff Hodgkinson

There are many aspects involved in successful project and program management: hard work, experience, good teamwork, solid processes and work practices, having good tools with which to work, adopting and displaying the right behaviours…the list could go on. This article focuses on two aspects of project/program management – the processes and the tools we use as program and project managers – and asks: What comes first – the process or the tool?

We do not seek to discuss the merits of different project management tools and techniques, nor will we examine the differences between program and project management; rather, we put forward what we hope are thought-provoking points for you to consider.

The case for processes first, tools second

Processes for project and program management are well documented and readily available today – from professional institutes and organisations such as the Project Management Institute (PMI) and the International Project Management Association (IPMA). They are also suggested by chartered institutes of various project-oriented professions, books and research papers, training organisations, and internal groups (for example, staff working in Program and Project Management Offices) in commercial and non-commercial organisations.

Ensuring a thorough understanding of processes to follow and how to "embody them" in your program or project is crucial to setting your program or project up for success. One key to success is to ensure processes are represented in 'the way you do things…', which in this article we will call behaviours and actions. Simply put:

- 'Behaviours' can be thought of as the way people in a project team conduct themselves during the course of program/project.
- 'Actions' can be thought of as the physical activities and interactions the project team undertakes and manages during the course of the program/project.

For example, having a solid understanding of the processes required to create a Project Management Plan (PM Plan) is fundamental to ensuring the PM Plan accurately portrays how the team will deliver the project. You must then display the behaviours and take the actions to make it happen. The same could be said of the project estimating and cost control process, the scheduling process, the procurement process, the quality process, the process of controlling risks and all other aspects of program and project management.

But even if you are aware of the processes you should follow and the behaviours and actions required, is this enough to guarantee success, or is there too much room to "manoeuvre"? Are you hindered if you know the processes to follow but cannot follow them because you do not have the right tools? Do you need a level of "control" that an appropriate tool can provide?

Consider this scenario: you are a Project Manager and have just hired a group of professionals from outside your organisation to run sections of your project. Neither you nor other members of the team have the time to show them "the way things are done around here," and the specific processes you expect them to follow. In

this case, is it enough to ask them to adopt the processes outlined in your procedures guides without providing specific tools that will provide direction?

Whilst a tool can embody good processes, one can argue that it is the behaviours and actions of individuals that make the real difference – regardless of the tool or tools they use. Such behaviours are a result of understanding how to perform certain activities; **this cannot be taught by a tool**.

The case for tools first, processes second

We all need and expect good tools to help us do our jobs. Whether you are an office-based professional Project Manager who uses a multitude of computer-based tools, or a professional that works in a different environment, you can't do your best without the right tools…or can you?

Years ago, project management was carried out with tools that were more manually-intensive than those used today – but they were tools nonetheless. In the same way, carpenters relied on manual saws and now use a variety of powered devices to help them get the job done more quickly and with less physical effort, and designers used hand-built models in the absence of specialist computer simulation software.

Project management tools of varying levels of complexity abound today. Some have evolved into entire systems for managing the project itself, whilst others are specific to particular disciplines. Many project management tools have been developed by the organisations that have refined them over the years through the use of feedback and wisdom from user groups. Whether they are scheduling tools, resource management tools, estimating tools, scope management tools or a composition of all these facets and more, they can provide a solid platform ("railway tracks", if you like) to control projects.

As an example, consider scheduling. Today's computer-based scheduling tools are very powerful, and allow real-time consolidated views ranging from a single project to a portfolio view of a global scale.

Tools can undoubtedly provide structure to our work. As long as they are task-appropriate and designed to support the process, they help us to become more efficient. And that is one of the keys to using tools – we need to use the right one for the job at hand: it should be a platform to achieve efficiency, and should be used appropriately and properly as a result of training.

Let's revisit our project scenario: In this situation, you are taking on a group of professionals from outside your organisation to run sections of the project, but you do not have the time to show them "the way things are done around here" and the specific processes you expect them to follow. Are you still confident that if you give them the tools they need with no attention given to the processes to follow, they will adhere to the processes in the manner that you anticipate?

Conclusion

We believe that processes and tools need to work in harmony with each other, and that the process should determine how the tool needs to be used. Tools vary in their level of sophistication, and they can definitely help your efficiency and level of consistency and control if (1) they are appropriate for the task at hand, and (2) they are used properly. You cannot use a tool effectively unless you know the processes it guides or instructs you to follow. The need to know "why" and "how" to use a tool is the reason that you first need an understanding of processes (and behaviours). Without the "why" and the "how," we will not understand the real meaning behind the task at hand.

Program and project managers need to combine process familiarity, embodied through behaviours and actions, with the tools to carry out their work. Understand your processes first, and then use the most appropriate tool available to you to undertake the process.

If you have an opinion on this article, we would really like to hear from you.
Please email us at Contactus@pmoracles.com.

Article Author Bios

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Their Roles

Their Plans,

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They have been translated into Arabic, Czechoslovakian, French, German, Italian, Spanish, Portuguese, and Russian and published on websites in Australia, Brazil, Canada, Chile, Czech Republic, France, Germany, Hong Kong, Italy, India, Netherlands, New Zealand, Poland, Russia, Turkey, UK, and the USA.

Their mission is to help expand good program and project management practices by promoting the PM profession, to be a positive influence to the PM Community, be known as eminent influencers of PM practices, and in earnest hope readers can gain benefit from the advice of their 60+ years of combined experience and expertise and include the expertise of co-authors who write with them on certain articles and subjects. Gary and Jeff have all five (5) of the PMI 'Family of Credentials'. Along with writing articles, each also champions a role in the overall writing program collaboration process:

→ Gareth manages all requests for additional guest author collaborations
→ Gary manages the article development tracking and readership metrics
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Jeff was also the 2nd place finalist for the 2009 Kerzner International Project Manager of the Year Award ™. He lives in Mesa, Arizona, USA and volunteers as the Associate Vice President for Credentials & Certifications and the Agile CER (Chapter Engagement Representative) for the Phoenix PMI Chapter. Because of his contributions to helping people achieve their goals, he is the third (3rd) most recommended person on LinkedIn with 530+ recommendations, and is ranked in the Top 60 (currently 51st) most networked LinkedIn person.

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