



# PMBOK 7: The Adaptive Project Manager

What it means to be an Adaptive Project Manager

# Overview

This whitepaper examines what it means to be an Adaptive Project Manager (APM) through the lens of the Project Management Institute's Guide to the Project Management Book of Knowledge, Seventh Edition (PMBOK 7). But before we get into the details, a brief discussion of how the new PMBOK 7 is different from previous versions will help to provide important context necessary to understand how it supports an adaptive approach without abandoning its prescriptive roots.



# Structure

The PMBOK 7 or formally “A Guide to the Project Management Body of Knowledge (PMBOK® Guide) – Seventh Edition and The Standard for Project Management” document structure departs from the former prescriptive or “how” direction and defines an Agile-like PMI “manifesto” of principles dealing with “what” and “why”. While the historical input/output process and compliance models do not disappear entirely, the major emphasis is shifted from deliverable-forward Process Knowledge Areas to Project Performance Domains focused on overall outcomes.

To reflect this change, the book is divided into 2 sections:

- the “The Standard for Project Management”, the ANSI approved content (what most people think of as “traditional” project management, with prescriptive and detailed instructions) and
- “A Guide to the Project Management Body of Knowledge” containing the “new” principle-based framework for applying all or parts of the standard. While the framework section is new to the document, the concepts and techniques have been around for decades.

Here’s a content summary of the major differences between the two latest versions:

PMBOK 6	PMBOK 7
Prescriptive – follow these steps	Principled – use these ideas
Predictive approaches only	Mix of approaches
Process oriented knowledge areas	Performance oriented project domains
Deliverable and technique focused	Outcome focused
Recognition of tailoring	Guidance for how to tailor
Target audience: project managers	Target audience: any project stakeholder

It should be noted that while there are significant differences affecting how a project manager might do their jobs between the two versions, the PMI is not abandoning predictive techniques. Far from it.

But what they are recognizing is that given today’s environment, there are many different ways to achieve success. And those methods are best explained by their underlying and somewhat fluid concepts, versus a rigid set of steps or activities.



# What is Adaptive Leadership?

The term “adaptive leadership” was coined by psychiatrist Ronald Heifetz in his 1998 book “Leadership Without Easy Answers”. Although the concept “adaptive management” applied to a business environment (in contrast with ecological practices using the same concepts in use for thousands of years) it has its roots in the scientific management ideas put forward by Frederick Taylor in the early 1900s.

From a contemporary review of Heifetz’s book, the Library Journal provides the best summary of what adaptive leadership is all about:

“... to approach problems as adaptive challenges by diagnosing the situation in light of the values involved and avoiding authoritative solutions, to regulate the level of stress caused by confronting issues, and to shift responsibility for problems from the leader to all the primary stakeholders.”

Heifetz’s 2008 follow-up, with co-authors Alexander Grashow and Marty Linky, “The Practice of Adaptive Leadership” expands on earlier works by providing tools and techniques to:

- accurately analyze issues within their respective contexts
- empathize and understand those who will feel a sense of loss from anticipated changes
- involve critical stakeholders in broader ways to embrace accountability for solutions and outcomes

The techniques evolve from the definition that the authors offer: “Adaptive leadership is the practice of mobilizing people to tackle tough challenges and thrive.” Thrive is an important word. Here’s why.

Heifetz, et al, in part, base their theories on characteristics that evolutionary biologists say are necessary for a species to thrive:



1. Over time, the core DNA of a species, the basic building blocks necessary for survival, is preserved



2. DNA not supporting survival is either discarded or reregulated



3. The remaining DNA is reorganized to allow the species to flourish in new ways and new environments



In other words, successful, long lived species and organizations are able to thrive over time by taking the best from their history into the future. But these characteristics, in biology and organizations, are not applied all at once or only in one place. Beyond the obvious “building on the past” analogy, Heifetz highlights several other biology-inspired conditions that promote thriving through adaptation:

- Experimentation
- Diversity
- Loss
- Time

Experimentation is just that. The only way to know if something is working is to experiment and compare the results. Each change for the better is kept. Changes for the worse are discarded. Improvisation is key.

In nature, diversity abounds. With people, diversity allows organizations (or entities) to leverage many different perspectives and alternatives. From diversity comes unique and sometimes counter-intuitive improvements, not present in cloned or duplicated structures, processes or roles.

Loss is an ever-present component in evolution as sub-optimal pieces are shed or changed. But unlike nature, loss is felt by people when confronted by change. This is why empathy toward those who are, or will be, experiencing loss is a critical component that must be employed if adaptation is to be successful.

Time is the final condition. Evolution does not happen overnight or by the end of the quarter. And while some changes can be accelerated, lasting change, built on prior experiments with diverse populations takes time to formulate, incubate, hatch and grow.

For the adaptive leader to succeed, that is to mobilize people to conquer difficult or complex challenges and doing it so the people and organization thrive, takes a mindset and tool chest that veer sharply from pure authority-based, command and control behavior.



# Why is Adaptive Project Management a good thing?

Organizationally, project or initiative management is a micro application of the larger entity-focused macro leadership associated with executive suites and upper management layers. Though the scope of effect is not the same, both share a fundamental goal: get people to do things that may or may not be in their best self-interests. For the project manager, this goal can be a daily challenge to accomplish. Project management using an adaptive leadership mindset and techniques can not only make the goal more easily achievable, but with greater value for all involved.

One of the top reasons why adopting an adaptive approach to project management is a good thing lies in its inherent separation of issues requiring technical solutions versus those in need of an adaptive approach. While adaptive techniques can be used to solve technical problems, it is rare to see an adaptive challenge addressed successfully with a technical fix. Practically speaking, the differences between the two are straightforward as shown in the table below (adapted from Ronald A. Heifetz & Donald L. Laurie's "The Work of Leadership"):

Technical Problems	Adaptive Challenges
Readily observable. Easy to recognize.	Often obscure. Difficult to identify. Easy to overlook.
Normally lend themselves to known, previously used solutions.	Require holistic changes to solve. Changes to roles, relationships, values and how things are done.
Typically can be solved by a subject matter expert or arbitrarily by authority.	Those with the problem are tasked to do the work of solving it.
Limited changes required; mostly inside organizational boundaries.	Multiple changes required; often crossing organizational boundaries.
People are largely pre-disposed and welcoming to technical solutions.	People commonly reject the notion that an adaptive challenge even exists.
Quick solutions can often be deployed, sometimes by edict.	Can't be edict-driven; requires experimentation; often takes perceptibly longer to implement.

Here are some examples of problems and possible solutions further highlighting the differences:

Problem/Issue	Technical Solution	Adaptive Solution
Rising rates of diabetes	More and different drugs	Lifestyle changes around diet and exercise
Increasing truancy in public schools	Geo-location trackers linked to law enforcement	Raising public awareness of the personal and public costs and risks truancy represents
Bias leading to missed hiring opportunities	AI-based resume review integrated with public record analysis	Sensitivity training to heighten awareness, combined with penalties for bad behavior



By providing the project manager with a way to recognize and articulate the difference between technical problems and adaptive challenges, time and effort can be more effectively and efficiently be prioritized. At the very least it provides a discussion framework that can be instrumental in achieving a positive outcome.

Another reason why adaptive project management is a good thing rests on the fact that one person can't nor should be the "go-to" subject matter expert on all topics that impact an initiative. Adaptive project management removes the leader from that role, freeing them to concentrate on supporting other aspects of the initiative.

Finally, adaptive project management provides a foundation of flexibility. By using a principled-based approach, project managers are free (within their operational environments) to pick those tools artifacts and methods that make the most sense to reliably achieve a desired outcome. This makes it useful across any functional area in any industry segment.

**“The single most important skill and most undervalued capacity for exercising adaptive leadership is diagnosis.”**

Heifetz, et al, “The Practice of Adaptive Leadership”



## **What is an Adaptive Project Manager (APM)?**

An APM is a project manager who is not wed to a single method, technique or artifact just because it was useful on the last project they managed. They are focused more on what it takes to provide value than on delivering things of questionable worth. If given the choice between working on assembling data for a routine status report and spending time with a customer to get a better understanding of their expectations, an APM would choose the latter, rather than the former.

APMs are mindful of the environment they operate in. They know reaching a successful outcome is less about what they do as individuals and more about how the stakeholders they interact with contribute, and sometimes detract from, the overall goal. They understand that for many outcomes, organizational success also means some people, required for that success to happen, will be negatively impacted. Rather than ignoring that fact (and those people), APMs use empathy to grasp the extent of the impact and engage those people in an effort to lessen what is often perceived as a sense of loss.

APMs develop deep understanding of how issues and problems manifest. They can tell the difference between problems that can be solved by using technical or subject matter expertise, and those that need a different approach. This is a critical skill. Heifetz, et al, in “The Practice of Adaptive Leadership” say “The single most important skill and most undervalued capacity for exercising adaptive leadership is diagnosis.”





## How does PMBOK 7 help transition from a “traditional” PM to an APM?

PMBOK 7 touches on many of the things that are needed to be an adaptive leader in today’s world of volatility, uncertainty, chaos and ambiguity; commonly acronymized to VUCA.

The wealth of information contained in PMBOK is enormous, whether you are adaptive, agile, predictive or a mixture when it comes to your (or your organization’s) approach to project management. And if you aspire to be “adaptive” you can, and should, pick and choose those pieces which make the most sense to you, given the context of where you are applying your project management skills. However, there are a few things in the PMBOK you need to fully embrace to become truly adaptive.

## The first thing is an emphasis on flexibility.

By adding an entirely new companion “guide” based on principles rather than processes, the current PMBOK encourages a thoughtful approach to project management rather than one singularly focused on executing a specific method.

**If your idea of project management is rooted in “doing things by the book” (and there is only one book), you will need to disabuse yourself of this belief.**

Next, while so-called predictive or waterfall methods are still appropriate for a large number of projects, especially in business sectors where the agile mantra of “fail fast” is not always an option (think construction or financial services), the ability to deal with rapid and often unforeseen changes requires a different mindset and collection of skills and techniques. Recognizing this reality, PMBOK 7’s focus shifts from deliverables to outcomes, although some may correctly argue that outcomes are not possible without deliverables.

Included with the emphasis on outcomes is the recasting of project management as a key component of a “Value Delivery System”. What is a Value Delivery System? “A business is a value delivery system”, says the title of a staff paper by McKinsey consultants Lanning and Michaels in 1988, which extended the notion of advancing appropriate value propositions at each

stage of production and distribution throughout the entire enterprise. Adaptive Project Managers use this construct as a touchstone to maintain alignment to what is important.

When new requirements appear or changes to completed work are requested, APMs look to what value is being created or enhanced before blindly forging ahead.

So the ability for the APM to recognize where, when and how value is being created and delivered is a good thing. It benefits the entity and the individual. But recognition alone is not enough. The APM must be mindful and deliberate in their actions relative to the Value Delivery System they find themselves involved with.

PMBOK 7 also contains new sections on “tailoring” and models, methods and artifacts. From a practitioners perspective, this collection of tools is perhaps the most welcome and useful addition to the document. These sections offer ways and means to adopt any practice that fits the situation at hand.

Of course PMBOK 7 has many more useful pieces that deal with specific techniques and expansions on their 12 principles and Domain Performance Areas. APMs can find much relevant content in this book. So whether you are a PMI member or not, if you are looking to up your PM game, you won’t go wrong getting a copy of PMBOK 7.



## Why training is the fastest way to become an APM?

By definition, being adaptive means dealing with challenges; challenging yourself and challenging others. Most of us find it difficult to challenge ourselves for obvious reasons. It's hard and can be painful. Likewise, challenging others can be both difficult and uncomfortable.

Training can help overcome the pain and discomfort by providing a number of useful things:



1. A safe environment for expression and questions



2. Compressed situational guidance in the form of tools and techniques



3. Objective feedback for improvement

The alternative is to assemble the relevant research and develop your own set of tools. But you will still be faced with trying to objectively give yourself feedback. That could take years.

You are encouraged to explore the SoftEd library of courses and material to help you on your journey.



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