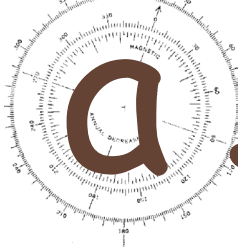


# Compass



VOLUME 7, NUMBER 1

## Dead Reckoning

*"Keeping track of your position using boat speed and course sailed is called dead reckoning." David Burch, "Emergency Navigation"*

When I was eight years old, I bought a cheap compass from a hobby shop. I had dreams of becoming a great navigator and earning some Cub Scout badge, but my experiences were baffling. The compass pointed in a different direction from what my map said was north. I first thought the difference was due to its being a cheap compass, but I later learned that my friend's fancy compass showed the same variation. Furthermore, when my family went on a trip to California, I found that even the variances of my compass varied, frustrating my best attempts to track our direction.

The problem was not with the compass but with its operator and with the world. The difference between magnetic and true north varies widely from location to location. The course from Seattle to Anchorage is due west on the magnetic compass and clearly northwest on the map, which is drawn from the perspective of actual or true north. The further north one goes, the wider the variation between magnetic and true north. Compasses simply fail; they do not work.

Yet they fail in somewhat predictable ways, and so with careful observation and continuing adaptation, they can be usefully employed in spite of the fact that they do not work.

### Our Tools Do Not Work

Our project management tools share this characteristic with the compass. They fail to accurately track our progress, but with careful observation and adaptation they can provide useful information.

Our tools have two clear shortcomings. First, the maps we follow are notional. They are created by imagining the territory we will traverse rather than surveying beforehand. Second, we mistake progress along our "projected" course for progress toward our objective—tracking our movement away from our starting point rather than our convergence with our target.

In the old days, ships navigated by a process called deduced (or ded) reckoning, which became dead reckoning. The process was remarkably simple, requiring only elementary observations. Twice each day, a small piece of wood attached to a rope was thrown overboard behind the ship and the time required to play out the attached rope was recorded. These readings, averaged over time, took the place of a

speedometer. Several times each night, weather permitting, sextant readings were recorded. Compass readings were also catalogued, but the varying deviations made these readings unreliable.

Still, using these crude methods, in good weather, an able navigator could calculate position to within 100 miles or so. And on the open ocean, a variation of 100 miles on a surface area the size of the Earth's (200 million square miles) is a remarkable feat. However, nearing a stormy coast in the dark was a terrifying experience, resulting in the wreck of many dead reckoning ships.

These early navigators relied upon some unchangeable reference points for their orientation. Their charts drew from centuries of observation, so certain characteristics of well-traveled routes—dominant winds and currents, for instance—were widely known. The sun, moon, and stars behave with clockwork precision, reliably repeating relative location and motion given a position. Observing the compass reading relative to sun, moon, and stars can compensate for compass deviations. So early navigators traveling a well-known route very often succeeded in reaching their destination.

Continued ...

## Ancient Echoes

Projects today continue to draw from these early seafaring practices. Project managers track their progress by a means remarkably similar to their ancestors' dead reckoning. The constant journalizing of actual against estimated expenditures, for instance, attempts to maintain an understanding of position by tracking the changes since leaving a known location. And with careful observation, anyone can clearly understand the differences between expected and actual experience. But what does this difference tell them?

If the course is well understood, such dead reckoning can prove remarkably useful. But how well do we understand the course between here and there on an exploration project? How useful are these dead reckoning activities most often employed as project management?

Judging from the success rate of projects, I'd say not very useful. But then the excursions we make today are much less certain than most ancient mariners' excursions. That we continue to model our navigation strategies after theirs in the face of these facts remains the most abiding mystery of project life for me.

## The Earned Value Fallacy

*Earned value*, a method used to track project progress today, carries within it the assumption that achieving points along a plotted course means that value has been added, that progress is being made, when it really only says that the project is on its originally projected course.

If our map is accurate, our dead reckoning should get us "close enough" to our objective. If our map is not accurate, as is most often the case on projects, our dead

reckonings fail to provide the most important information we need to reach our objective: the recognition that our course is wrong.

Our ancestors recognized two distinctly different kinds of navigation—the navigation required to sail a well-known course and the navigation required to sail an unknown one. Columbus, for instance, sailed an unknown course and mistook his landfall to be the Indies rather than the Caribbean because the maps of his time did not recognize the existence of the Caribbean. He mistook his notions for facts. Other explorers eventually sailed further west to the Indies by sailing south and then north, showing Columbus's error.

## Sailing South To Get West

Nothing in the maps of those times could have told those later explorers to sail south to get west. I imagine those explorers trying to explain their course to their expedition's internal auditor, and failing. Explorers gained funding by projecting an alluring destination, not by having high-quality maps. Later explorers knew the latitude and longitude of their destination but had little information about the course that would get them there.

Merriweather Lewis, for instance, knew the precise coordinates of the mouth of the Columbia River but had only spotty hearsay information about the territory between the Mississippi River and his destination. He plotted a course to satisfy government auditors and then set out doing what actually needed doing to reach his destination. He spent little precious time reconciling the differences between actual path and planned course because such dead reckoning could not have helped him achieve his objective.

What he did instead instructs

those of us plotting explorations into unknowable territory.

He maintained a journal that focused not simply upon dead reckoning statistics but on cataloguing his and his community's subjective experiences. Lewis's journal became the most valuable product of his exploration. It captured the experience as it was unfolding. From it, we can understand his decision-making and share some of the adventure. More important, and I can only suppose this is true, Lewis could review his own entries, extract the patterns within his behavior, and teach himself how to achieve his goal.

He also had an alluring objective. The enormous economic and strategic value of a water route linking the Mississippi with the West Coast was a powerful attracting force. Thomas Jefferson, Lewis's sponsor, well understood that the cost of discovering this route would be dwarfed by the long-term value of the route. Value consciousness replaced cost consciousness, so the exploration was easily justified and not very easily discouraged.

## Lewis and Clark Had It Easy!

Merriweather Lewis had it easier than most project managers have it today, though. Imagine his difficulties had an auditor been present on the expedition, questioning each resource allocation and demanding an explanation whenever the actual costs diverged from the original projections, which they did almost from the start of the adventure. Lewis was hounded by government auditors wanting such explanations from the day he returned until the day he died, but he had been free to explore without a real-time auditor present. Today's project managers live under a microscope of cost consciousness that often prevents meaningful exploration. The weekly report must be on time

and it must show progress along the expected path. Reporting that the path has shifted elicits a string of requests to justify the shift, even though no map could justify the change.

If your project is following well-known routes, dead reckoning reporting will likely serve it very well. If not—if your project is doing what has never been done before, or never been done by you and your organization before—such techniques add little value. Explorations demand vision and a clear understanding of the value of the result more than a frozen specification and an accurate projection of the cost. Since accurate cost projections are impossible to determine for such undertakings, the effort tracking against them is largely wasted.

### Tracking An Expedition

So how does one track explorations? Explorations are more meaningfully tracked by assessing progress toward the objective rather than distance away from the starting point.

First, in order to track convergence with the objective, the objective must be clearly stated. A clear and compelling vision must exist for the project. If your exploration has nothing more than a ho-hum target, it is unlikely to garner the passion needed to successfully pursue it. Well-crafted visions include a what, a why, and a how we'll know when we've achieved it:

- What is our goal? This can be usefully stated in metaphorical terms and should not be rigorous in the way that a project's requirements might be rigorously stated.
- Why are we pursuing this objective? "Why" gives the pursuers

judgment, which is the source of meaningful adaptation.

- How will you know when you've achieved the goal? Stating this in observable and measurable terms gives the explorers and their sponsors a tangible target, a means for knowing when the exploration has ended.

Second, a journal or logbook can capture the team members' subjective observations of their experience, and more important, it can accurately portray the expedition's patterns to the expedition over time. This information is the basis upon which their plotted course might usefully change. To catch themselves being themselves is the very soul of insight, and such insight creates choice where none might otherwise exist.

If I were auditing such an expedition, I might well require dead reckoning data to assure myself that attention was being paid to velocity and burn rates. But my investigation would just begin there. I would expect the explorers to crisply describe their objective—what, why, and how they'll know when they've succeeded. I would check for coherence among the assembled party members, understanding that an incoherent vision—one understood in materially different ways by members of the same team—is the single most common cause of project failure. An incoherent team cannot adapt in a coordinated fashion, and will likely natter away opportunities. I would want to know how the vision had refined over time, what experience had presented, and what choices had been made.

I would want to see the project's journal. There, I can catch the patterns of engagement, see the team members' judgment in action, and share the adventure. I might catch patterns they have not seen, which might spark an unsettling though

possibly useful conversation.

The status-reporting meeting is the most dreaded of the many meetings a project team attends. Most complain of having to prepare irrelevant material and answer meaningless questions such as the vacuous, "What percent complete are you?" Status so often focuses upon dry dead reckoning data as if analyzing that should provide useful information.

### Pulling Your Project Home

I will not argue against the inevitable. Your sponsor will expect you, as a qualified project manager, to maintain and report dead reckoning data. As a skilled practitioner, though, you should never forget the tools that will give you the ability to pull your project toward its objective rather than simply push it away from its origin.

- Maintain the vision, and share it widely and often to ensure that the team understands it coherently.
- Keep a journal daily, jotting down your impressions, feelings, and perspectives. Encourage the others on the expedition to keep a journal, too.

This daily discipline of considering your experiences can add more value to your exploration than a ton of dead reckoning. As unlikely as it might seem, your journal could become, like Merriweather Lewis's journal became for the Corps of Discovery, your project's single most enduringly valuable product.

*For more information on this subject, see our Heretics' Forum page:* <http://pc.wiki.net/wiki.cgi?NotesOnJournaling>

*See our Website for what's new:* [www.projectcommunity.com/whatsnew](http://www.projectcommunity.com/whatsnew)

## Notices

True North pgs offers three ways for you to improve your project's navigation.

See our website-[www.projectcommunity.com](http://www.projectcommunity.com) for details on our

1. *Mastering Projects Workshop*,
2. *Mastering Project Work* workshop, and
3. *BeyondLeadership* program.

We also offer Brief Consulting services designed to bring projects on course quickly and effectively

Also, visit our *Heretics' Forum*  
<http://pc.wiki.net>

## About *Compass*



*Compass* is published periodically by **True North pgs, Inc.**, and is distributed free of charge to a project-oriented community.

*Compass* is a navigation tool for continuing your process of improving your project experience. *Compass* shares stories and insights to serve as the basis for you to provide more effective leadership to yourself and to your project's community. We enable each other to improve the quality of our project experiences through sharing our stories and our insights.

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David A. Schmaltz, Founder

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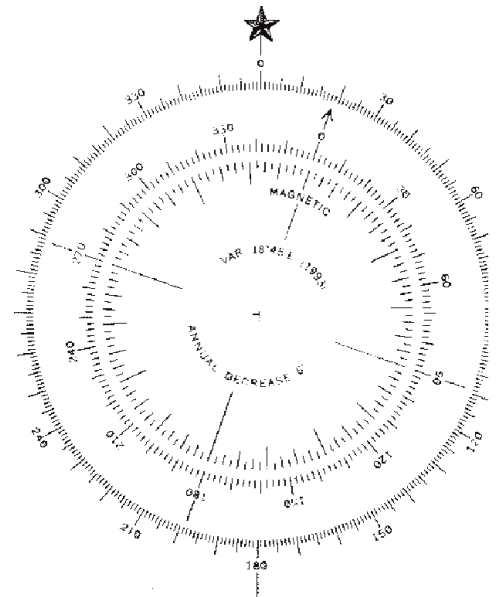
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## Mastering Troubled Times

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### We've Noticed

Whenever the economy goes sour, renewal activities disappear first. Budgets evaporate and a corporate-wide hunkering takes over. Cost consciousness blinds everyone to the real value of new ideas, skills, and insights at the very time when organizations need them most! We offer the following tips for mastering troubled times.

### Power vs. Force

Many fail to properly distinguish between power and force. They try to force things through troubling times, cursing their situation. Force never succeeds against immovable barriers. Power can succeed, however, where force merely frustrates. What is power? Think of power as a lighthouse broadcasting its beam. Lighthouses do not race up and down the beach looking for ships. They stand stationary, confident in the strength of their light and the ships' ability to see that light. Your clear vision and powerful convictions attract the support you need.

### What Do You Want?

Focusing on what you want rather than what you might have to do to get it can overcome scarcity awareness. In difficult times, we more easily see barriers surrounding our objectives. We might be able to list a hundred and one reasons why we can't get what we want, losing our natural ability to create what we need, and starving ourselves in the shadow of unrecognized prosperity. Get clear about what you want and try to lose that focus on why you can't get it. Clarity on your real objective can manifest amazing resources.

### What Do "They" Really Want?

Your sponsor uses your project to promote something. He has not suspended *his* objectives for the duration of the difficulties. What is he pursuing, really? His answer might surprise you—the real objective is often nothing like the public one. Prepare to be surprised how supportive he becomes when your actions clearly align with his aspirations. When what you need sits between your sponsor and his goal, resources suddenly appear. Understand the aspiration behind their public objectives and visibly align your project to support them.

### Community To The Rescue

Many increase their competitive behavior when times get tough, acting as if they needed to force others to lose in order to sustain themselves. Consider increasing your cooperation instead. Wash the other guy's hand. The community you create with your unexpected and disarming generosity will sustain you long after the troubled times have gone.

### Your Vendors Want You To Succeed

The help you need wants to help you! A tight budget or a policy against outside support becomes an excuse for not investigating what might be readily available. Your vendor wants you to succeed. Now is a dandy time to test the depth of your relationship with your most valued providers. The ones truly dedicated to your success will be pleased to visit with you, listen to your aspirations, and set to work helping you identify ways to help make the constraints you're living in better sustain you both. Did you know that the best consultants give away their best stuff? They will welcome any opportunity to showcase their best. Just ask!

### Choosing To See The Horizon

Choose to see the horizon. Avoid indulging in the seductive discouragement surrounding you. Find some reason to maintain your optimism, enthusiasm, and joy in your work. The old adage says that you can have everything you want or all of the reasons why you can't have everything you want, but you have to choose one and only one of these alternatives. Choose the one that offers horizon, some hope for better times.

### The Cost of Not Doing

What are you spending to avoid what you know you really need? A single side-ways project will insidiously steal from next year's budget, when aligning it can be a trivial present expense. Comparing the cost of not doing with the benefits of having done can cause even the stodgiest cost accountant to beam! What is it really costing you to maintain a hobbled status quo?

### Ditch Your Certainty

In the good times, it might have seemed that you could do no wrong. Be careful about classifying your experience as wrong just because it turns out differently than you expected. Certainty is an act of projection, anyway, never as real as it seems. Difficult times bring a wonderful opportunity to work on losing some of that certainty which seemed so warranted in better times. The most effective leaders are those who carry a humbling confidence in their own blindness along with their unshakable conviction that they will find ways to succeed anyway.

### Breakdown or Break Through?

Expect breakthroughs to appear first as breakdowns. When your world seems to be falling apart, think back to the breakdowns you've experienced in the past, acknowledging that they often preceded a phase or paradigm-shifting breakthrough. There always has been a difference between doing well and feeling good about the result. The catastrophe you most fear will likely be the source of your greatest transformation.

### Inventing Reasons To Celebrate

You are accomplishing in spite of the difficult times. Have you remembered to adjust your internal critic for the change in the viscosity of the fluid (or has it become a solid, now?) you are moving through? Find reasons to celebrate your progress against the current. As one client said, "We might not be making the profit increases we made three years ago, but we *are* making a profit." If you can't find a reason to celebrate your own experience, find a reason to celebrate someone else's. Their good fortune could rub off on you.

*Working well together to create exceptional results, building on our best selves, and dealing with the world as it is—no matter how troubling the times.*

### How We Can Help

True North pgs can help you master these troubling times.

To see how we might help within your current constraints, contact us at 509.527.9773 or [tn@ix.netcom.com](mailto:tn@ix.netcom.com).

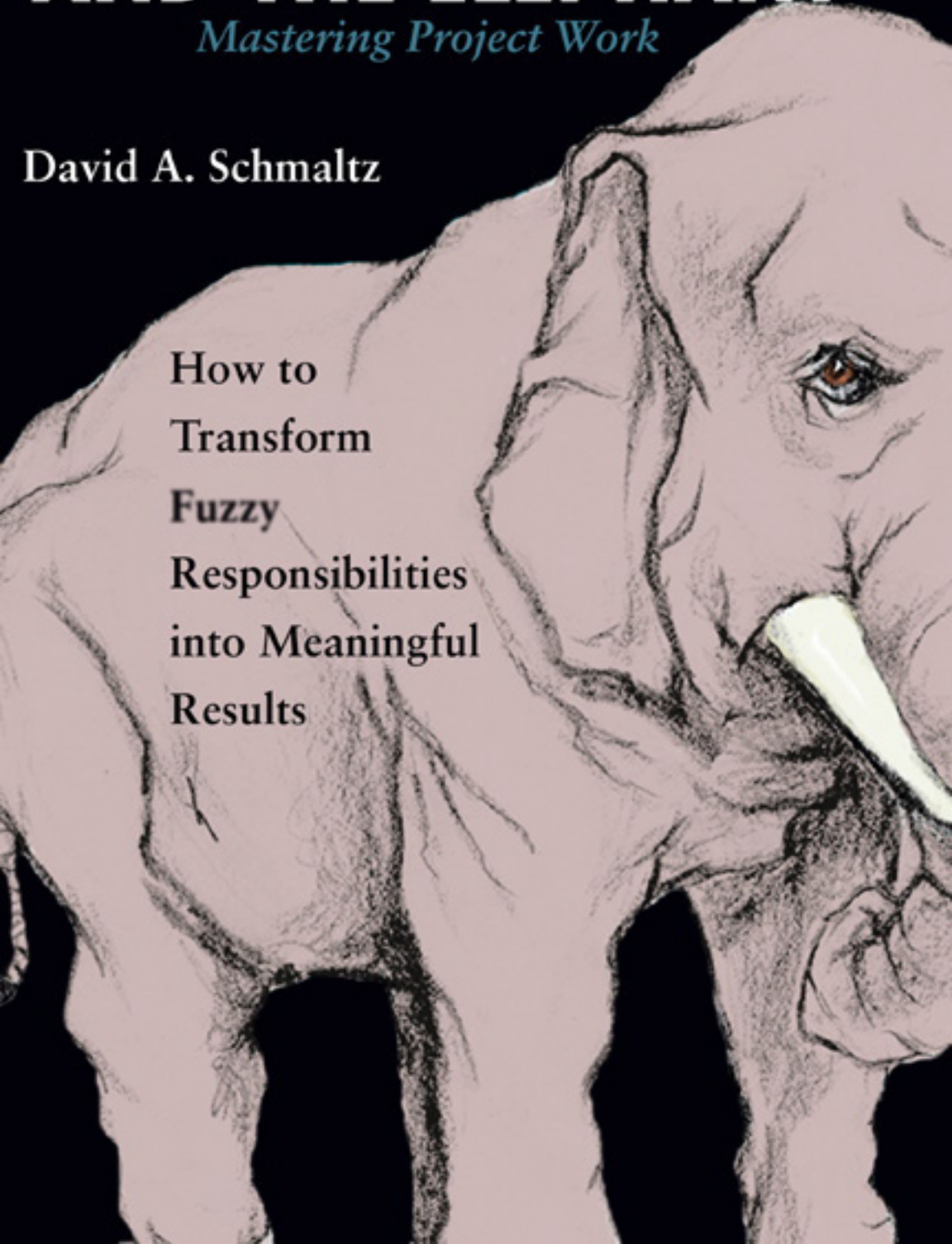
*"You are the most powerful project management tool you will ever use."*

# THE BLIND MEN AND THE ELEPHANT

*Mastering Project Work*

David A. Schmaltz

How to  
Transform  
**Fuzzy**  
Responsibilities  
into Meaningful  
Results



## **The Blind Men and the Elephant: Mastering Project Work**

By David A. Schmaltz

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If you work, you probably manage projects every day—even if “project manager” isn’t in your official title—and you know how frustrating the experience can be. Using the familiar story of six blind men failing to describe an elephant to each other as a metaphor, David Schmaltz brilliantly identifies the true root cause of the difficulties in project work: “incoherence” (the inability of a group of people to make common meaning from their common experience).

Schmaltz exposes such oft-cited difficulties as poor planning, weak leadership, and fickle customers as poor excuses for project failure, providing a set of simple, project coherence-building techniques that anyone can use to achieve success. He explains how “wickedness” develops when a team over-relies on their leader for guidance rather than tapping their true source of power and authority—the individual.

*The Blind Men and the Elephant* explores just how much influence is completely within each individual’s control. Using real-world stories, Schmaltz undermines the excuses that may be keeping you trapped in meaningless work, offering practical guidance for overcoming the inevitable difficulties of project work.

*“David Schmaltz has an extraordinary ability to decipher the human dynamics that destroy projects and damage relationships, and his insights and ideas reveal how to avoid these problems. Don’t start your next project until you’ve read this book.”*

—Naomi Karten, author of *Communication Gaps and How to Close Them*

*“I appreciate Schmaltz’ ability to paint a picture of project management that includes the most important ingredient—people. Understanding and integrating the concepts of this book will make managing projects and people a whole lot more fun.”*

—Chuck Kolstad, President and CEO, ANTARA

*“This book is pithy, insightful, and in places, profound. The ratio of ideas to paragraphs is quite high. Plan on reading it more than once.”*

—Randon L. Taylor, Lead Programmer Analyst, Standard Insurance Company

*“Be prepared for a journey of discovery into how your choices impact your effectiveness. A thought-provoking book about not only work projects, but effectiveness in other areas of life.”*

—Mark Lewis, Lieutenant Colonel (ret), United States Air Force

David A. Schmaltz is the founder of and Principled Consultant for True North project guidance strategies ([http:// www.projectcommunity.com](http://www.projectcommunity.com)), a consulting firm dedicated to helping people work well together to create exceptional results.

**“You are the most powerful project management tool you will ever use.”**