

## Robin Hood PMs vs. Feudal Line Management



**By Dick Billows, PMP, GCA**

**We have some fun with the challenges of borrowing resources in an organization filled with feudal department managers and turf wars.**

Torches flickering in the medieval night, savage hounds snarling just feet away, our project Robin Hood parts the high grasses, seeking a glimpse of the feudal castle where desperately needed project team members live. Sure, there were all those blasé assurances of “full support” from the line managers before the project started. Now that work has begun, these feudal Sheriffs of Nottingham patrol their castle walls, hurling stones and boiling oil on PMs who attempt to utilize one of their artisans. As each PM falls, the sheriffs cry, “A person can have but one boss and that is I.” To actually permit a PM to make assignments directly to an artisan or reward their performance is an unspeakable heresy. In some organizations the walls of the feudal castles are high and ringed with deep moats.

Cross-functional projects usually fail because the mix of technical and functional skills cannot be mustered in a timely fashion. PMs use a variety of tactics to scale the walls in brave assaults or try to slither under the castle’s gate and steal the people they need. Often they wind up impaled on a sheriff’s lance. The line managers also face a harsh dilemma. There are dozens and dozens of PMs seeking to borrow their people, supposedly for just the briefest of moments. But “one-week” assignments turn into months of absence. It wasn’t so bad when projects were few and far between. But now a large portion of the castle’s artisans and craftspeople are working on projects for internal PMs or outsiders with no consideration given to the impact on the castle’s productivity and performance. So PM Robin Hoods battle the feudal sheriffs over the authority between PMs and their borrowed people. But the PM quiver holds just a few warped arrows.

### What kind of PM authority?

The feudal sheriffs prefer a relationship we can characterize as “In the Hopper” authority for PMs over borrowed resources. With this kind of



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authority, the sheriff notes the PM's project work assignment on a scrap of paper but does not assign a specific individual from the castle to complete the task. The only commitment to a due date is the sheriff's wily smile and bland assurances. The sheriff then stores the project assignment along with all the others on a corner of the feudal desk. Unfortunately, this "Hopper" is perched right above the sheriff's trashcan and the slightest nudge or breeze can send it plummeting into the oblivion below. PMs find "In the Hopper" authority worse than being "drawn and quartered." They don't know who will be working on the assignment and they can only hope that someone will eventually be assigned and that the sheriff communicates something close to what the project needs. When the sheriff finally does allow work to start, the selected individual is not usually the most skilled artisan in the castle. Often, the sheriff picks an individual whose absence may actually improve the castle's performance or someone who needs to be punished. But a nincompoop is better than no one.

Our Robin Hood welcomes him or her to the merry band with open arms. How long they stay in Sherwood Forrest has little or nothing to do with the assignment's completion. The sheriff may recall them on a whim or to silence another whining Robin Hood. How does the borrowed person react to all this? It's clear that the project assignment should not, in any way, interfere with the person's accountabilities in the castle. It's there after all, that the sheriff will decide on compensation, promotion and continuing employment. The PM has none of these rewards to dole out and even the PM's evaluation of performance counts for little or nothing. With several borrowed people on the team, usually on critical path assignments, the project team takes on an excessively casual, holiday-like atmosphere. This is in stark counterpoint to the user or client King who views the project as a crusade and reminds the PM of its importance at annoyingly frequent intervals.

## Higher authority

Knowing that "In the Hopper" authority is like a plague in its impact on projects, PMs work to elevate their authority to the "Persuasion" level. Here they still have no authority to assign work, evaluate or reward performance. Instead the PM relies on blame, bribes, begging and a winning 34-tooth smile. To avoid "In the Hopper" authority entirely, the PM may slither under the castle gates and persuade a craftsperson to work on the project in their "free time." This tactic requires steely nerves and the abandonment of pride and dignity. The snake-oil pitch to the craftsperson begins with a lofty explanation of the project's purpose, tailored to the craftsperson's particular technical or corporate biases. The silver-tongued PM devil then describes the incredible opportunity the assignment offers the craftsperson for creativity, innovation and the expansion of skills. Consultant PMs may sweeten the pot by offering sports tickets and dinners and internal PMs may offer similar inducements. Both repeatedly refer to the high-ranking executives who favor the project and whose undying but secret affection the craftsman will earn. The persuasion tactic takes a lot of time and must continue for the duration of the assignment. Slavering praise must be heaped on every tiny accomplishment and the PM must accept scope creep and drift or the craftsperson may simply walk back to the castle in a huff. These first two levels of cross-functional authority don't really help too much so the inventive PM tries

other tactics. Our Robin Hood can also try asking the King for support in securing the necessary resources in the hopes that this high-ranking executive will act on the problem escalation. Unfortunately for consultants and internal PMs alike, escalating too frequently undermines credibility. After several requests, the King begins to doubt the PM's skills and ignores the escalations. Even if the King acts, the sheriffs defend their castles using the tactics discussed above. In these feudal kingdoms priorities are rarely set or if they are, everything is a #1 priority. So the feudal sheriffs simply ask the King, "What's more important, my department's work or all these projects?" This is an excellent question for which the King has no answer but to say, "Try to get everything done." A related tactic is for PMs on larger projects to try and build their own castles; securing the people they need as their subordinates and becoming the feudal sheriff themselves. Then they can joust with other PMs who want to use their craftspeople. When the King will not let a PM build a project castle, the PM hoards resources, often having highly skilled artisans do simple work rather than releasing them to the resource pool where their skills could be better utilized. The lowest two levels of PM authority ("In the Hopper" and Persuasion) are desperate measures that don't work very well, despite their wide usage. PMs help themselves with a bit more front-end work and a better project charter. These may allow us to move up to stronger authority levels where we have some influence on; selecting the person who will do the work, assigning them work directly or even "owning" a carefully defined portion of their work week or month. But these three higher authority levels require a much improved project charter.

## **Magna Charter**

The project charter should address cross-functional authority issues but that section often gets lost among 50 pages of assumptions and mission narrative. Even when we take a "Broadbrush" planning approach and generate a concise decision making document, PMs are vague about the authority the project requires. Their motivation is to avoid conflict with the feudal sheriffs at the beginning. But savvy PMs know that this conflict is inevitable and that it is better to have the debate on authority now than to wait until the project is late and over-budget. Then, the PM appears to be blame shifting when slippage is explained by finger pointing at cross-functional resources. We need to specify how we will assign work to people from across functional or organizational borders. An achievement network maps the accountability lines in a project and shows where we need authority. We must also make crystal-clear assignments in unambiguous, measured achievement form. When each assignment is coupled with a work estimate, we go a long way towards assuring lending departments that our use of their people will be controlled. We must also detail how we will evaluate performance and against what standards (See Achievement-driven Project Management). Finally, we describe what rewards people who meet or exceed their assignments will receive and how this reward will tie to the organizational reward processes. We also must recognize the different strengths of PM authority discussed above. We can't expect all project assignments to have dedicated resources whom we can manage as subordinates. We must make careful choices. We ask for the higher-level authorities for assignments that are on the critical path, high risk, longer in

duration or require rare skill sets. For many resources and assignments we can live with lower levels of authority and even settle for "In the Hopper" authority on shorter assignments. Asking for too many "owned" resources will lead to "In the Hopper" authority for every assignment. But even a Magna Charter is not a perfect solution, particularly in rigid organizations where the feudal attitude toward projects is firmly ingrained. The best answer is to couple better PM techniques with evolved organizational processes.

## Project-based Organization

The project-based organization is one end of a continuum; the feudal hierarchy is the other with many positions in between. In the full-blown project-based organization, the line management hierarchy is weaker. The authority of sheriffs in their functional or technical castles has been weakened to some extent to allow project managers to exercise assignment, evaluation & reward authorities over borrowed resources. Artisans work on many projects for many different bosses and each of them exercises the above authority during the project duration. Every assignment "counts" for the borrowed artisan. We often speak of Enterprise project management and consistent PM methodologies. The enterprise protocol must create a foundation and process for borrowing people across functional lines. This is not as simple as it sounds because feudal forces are powerful and line-managers do need processes that protect the performance of their departments. Organizational budgeting, evaluation and reward processes may need to evolve to accommodate these needs and this is painful. The processes and techniques discussed above let organizations gain the competitive advantage of consistent success in cross-functional projects.

To learn [Achievement-driven Project Methodology](#) consider taking one of our 1-on-1 courses over the web where you work with an expert PM.