The Art of Escalating to Senior Management
by Harold Kerzner, PhD and
Al Zeitoun, PhD

Advisory

THE ART OF ESCALATING TO SENIOR MANAGEMENT [1]

Harold Kerzner, Ph.D. and Al Zeitoun, Ph.D.

BACKGROUND TO EXECUTIVE INVOLVEMENT IN PROJECTS

All project managers desire to complete their projects successfully and with minimum disruptions. Unfortunately, the same project managers know there will be challenges and issues and hope the project team can successfully address them without having to involve the senior levels of management.

In the early years of project management, most project managers had technical backgrounds and were comfortable solving primarily technical challenges on projects. Executives were assigned as project sponsors to assist with business-related project decision-making problems. Sponsors also addressed many of the human resources and team staffing issues. Project managers felt reasonably comfortable continuously bringing most of these problems to the sponsors for hopefully quick resolution rather than asking the project team for help.

Executive project sponsorship began taking a toll on senior management that had to commit more time than expected to sponsorship, thus neglecting their primary duties. Some companies pushed sponsorship down in the hierarchy to middle-management levels or project management offices and project management centers of excellence. Other companies established sponsorship training programs, but in most companies, senior managers were reluctant to attend sponsorship training. Some senior managers were fearful that performing as a sponsor on a project that might fail could damage their career.

Today, with the growth in project management practices and investments in more projects requiring innovation and creativity, the need for executive involvement in critical problem decision-making efforts has increased. However, companies are now clearly defining

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what escalation means and are creating a structured approach as to how the escalation process should work.

TYPES OF ISSUES REQUIRING ESCALATION

As reflected by Figure 1, in project management, escalation is the process of bringing an issue or problem to higher levels of management or the most relevant stakeholders when the problem cannot be effectively resolved by the project team or current levels of management. The escalation process makes senior management aware of critical issues. The type of problem should be a situation that is serious enough to impact a successful outcome of the project if not resolved in a timely manner and neither the project manager nor the project team have the authority to resolve the problem. Good escalation practices make senior management aware of problems and help identify people within the organization that possess the authority to resolve the problems.
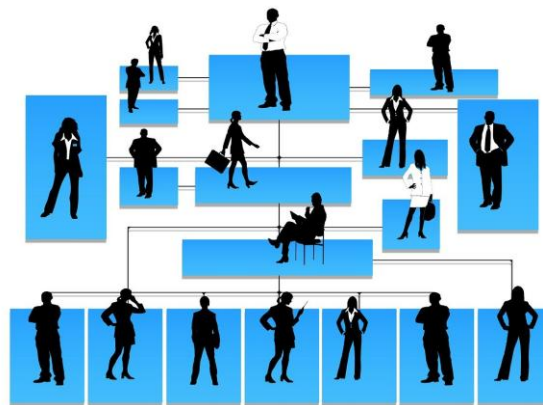

Figure 1 – Identifying the Proper Escalation Channel
https://pixabay.com/illustrations/silhouettes-hierarchy-people-man-81830/

Usually, clients and stakeholders know about the issues and are informed by the project manager that the issues are being escalated to senior management for assistance. Informing stakeholders that escalation will happen lets them know you are trying to resolve the problems, and this may prevent them from overreacting and making things worse.

Types of issues that generally require escalation include:

- **Significant deviations from established budgets and schedules:** Not all deviations require escalation. But those deviations that could result in the cancellation of the project, or a significant scope change, or possibly eliminate future business from a client should be escalated. If the outcome of the project is

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a product, the deviations could seriously impact sales and the business value of the product.

- *Significant changes in scope or requirements:* The scope changes could be necessary to overcome serious technical or quality issues and prevent defects. The project team may or may not fully understand the impact of the scope changes, especially if the company's business model can be adversely affected. Sometimes, team members overreact to scope changes that might remove them from their comfort zones. Also, the impact that scope changes can have related to stakeholder expectations must be understood.

- *Conflicts with resources:* The assigned resources on a project may lack critical skills needed to perform the work. The organization may not have people with the required skills or the people with the skills are overbooked and working on other projects. If the issue is not resolved, the project's requirements and constraints will not be met. Another resource-related issue is when the project manager has very limited authority over the resources in providing them with directions on how the work should be performed, assuming the project manager has the expertise.

- *Conflict with obtaining approvals:* As project management grows, there is an increase in new tools, methodologies, checklists and templates. Many companies have established often rigid approval processes, policies, procedures at project gates allowing a project to continue to the next life cycle stage. Project managers may have limited authority in getting continuation approvals in a timely manner.

- *Conflicts with stakeholders:* There could be significant disagreements between the project team and the stakeholders or between the stakeholders themselves as to the direction of the project. Miscommunications or delays in communication can have a serious impact on budgets and schedules, thus increasing the chance of possible lack of project progress. Project managers generally have no authority over stakeholders and usually require senior management intervention.

- *Mitigation of risks:* Project managers may be fearful that some risks with a high likelihood of occurring can cause significant damage or project failure, and the team lacks the ability to mitigate these risks without senior management assistance.

- *Other unresolved problems:* Sometimes there are problems and challenges facing the team that the project manager is unable to resolve because of limited authority. Problems that remain unresolved can be demoralizing, and lead to failure. This also includes trying to resolve certain issues that occur repeatedly but being unsuccessful each time.

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PREPARING FOR ESCALATION _____

Once the need for escalation is identified, the next step is to prepare for the meeting. First and foremost, the people to whom the issues will be escalated have other responsibilities and cannot be expected to spend a great amount of time resolving project problems. To help them make effective use of their time, you must be clear and concise about the issue, the expected decisions you would like the committee to make, and the projected outcome you desire.

You must provide them in writing with a clear understanding of the issue including the severity, the supporting data, and the potential impact if not resolved. The supporting data can come from team members, clients and stakeholders who are or will be impacted by the issue and decision for resolution. Avoid assigning blame to individuals. This information then helps senior management decide how much authority is needed to address the issue, who has the needed authority, who in a senior management position should be accountable for this problem, and what decisions might be appropriate.

Decision-makers want to hear about potential solutions you might have as well as problems. You should include the recommendations for a solution for each issue, what management might decide to do, and the probable outcome and risks to the project. Providing possible solutions as well as problems can speed up the time necessary for an effective decision to be made.

Maintain documentation of all of the steps you took in the escalation process. This becomes important if the escalation process must be repeated in the future for the same problem and especially if different people are participants in decision-making on repeated escalations.

Some companies maintain escalation policies and procedures to be followed regarding documentation, timing and recommendations for expected outcomes. Escalation policies are designed to promote effective communication and collaboration between project teams and decision-makers at the senior levels of management. These policies and procedures must be followed to avoid downstream complications. These policies are designed to address and hopefully resolve problems and issues promptly with minimum downstream damage, schedule slippage or costly setbacks to the projects.

There is no guarantee that the escalation process will be successful. However, you must recognize the escalation process as a learning experience and document the event. Record the steps taken and the actions of the escalation committee members. This is necessary should similar issues appear in the future requiring resolution.

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THE ART _____

There are several types of healthy practices to handling escalations that are at the core to the art of making it an effective process across projects and programs. As highlighted by Figure 2, it is a people-first process. Having the right people involved in articulating the true cause of the issue, is critical. The openness of dialogues and the clarity of communications are fundamental ingredients for ensuring we are solving the right issues.

Figure 2 – People-First Escalation Process
https://pixabay.com/vectors/discussion-collaboration-teamwork-9853953/

The slowing down to go faster ingredient is part of this art. Future project managers should possess the strategic insights necessary to ensure that all the voices around the decision-making table are being heard. This includes that opposing thinking patterns are encouraged and respected. In addition, enough distance is created from the issue at hand to ensure objectivity and the excellence in looking at the issues from a variety of angles. The storytelling qualities will come in handy here too as the team prepares a clear and concise statement that could be shared with senior management and key stakeholders.

One other critical dimension to this art of escalation is the establishment of clear linkages between the issues and the project's key value metrics that these issues would affect. Senior management are much more likely to pay the right level of attention and sacrifice the necessary time to addressing the required actions, when they see the direct impact on the potential project value that could be negatively or positively changed.

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Good project managers understand what they need to do speak the language of executives. They know language matters and in a future that is AI-enabled, the expectation of articulating the escalation issue in an easy to follow and act upon format, is a highly valued quality, that is a reflection of this art. Just remember the other side of a people-first process is that the project management maturity level could be an additional issue. When a problem is escalated, you sometimes do not know where the problem will end up!

THE PATH FORWARD _____

Understanding the escalation process can be highly beneficial to companies that are working on a multitude of challenging projects. There are three significant benefits to using escalation correctly:

- Good escalation practices foster a culture of openness where important problems can be resolved in a timely manner with minimum impact on the project's requirements
- Risk response planning can be part of the decision-making process to minimize overall risks to the project
- Following a structured process provides senior management with information on who must have the authority to resolve the issues effectively as possible

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Dr. Harold Kerzner is Senior Executive Director for Project Management for the International Institute for Learning (IIL). He has an MS and Ph.D. in Aeronautical and Astronautical Engineering from the University of Illinois and an MBA from Utah State University. He is a prior Air Force Officer and spent several years at Morton-Thiokol in project management. He taught engineering at the University of Illinois and business administration at Utah State University, and for 38 years taught project management at Baldwin-Wallace University. He has published or presented numerous engineering and business papers and has had published more than 60 college textbooks/workbooks on project management, including later editions. Some of his books are (1) Project Management: A Systems Approach to Planning, Scheduling and Controlling; (2) Project Management Metrics, KPIs and Dashboards, (3) Project Management Case Studies, (4) Project Management Best Practices: Achieving Global Excellence, (5) PM 2.0: The Future of Project Management, (6) Using the Project Management Maturity Model, and (7) Innovation Project Management.

He is a charter member of the Northeast Ohio PMI Chapter.

Dr. Kerzner has traveled around the world conducting project management lectures for PMI Chapters and companies in Japan, China, Russia, Brazil, Singapore, Korea, South Africa, Canada, Ireland, Germany, Spain, Belgium, Poland, Croatia, Mexico, Trinidad, Barbados, The Netherlands, Sweden, Finland, Venezuela, Columbia, United Arab Emirates, France, Italy, England, and Switzerland. He delivered a keynote speech at a PMI Global Congress on the future of project management.

His recognitions include:

- The University of Illinois granted Dr. Kerzner a Distinguished Recent Alumni Award in 1981 for his contributions to the field of project management.

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- Utah State University provided Dr. Kerzner with the 1998 Distinguished Service Award for his contributions to the field of project management.

- The Northeast Ohio Chapter of the Project Management Institute gives out the Kerzner Award once a year to one project manager in Northeast Ohio that has demonstrated excellence in project management. They also give out a second Kerzner Award for project of the year in Northeast Ohio.

- The Project Management Institute (National Organization) in cooperation with IIL has initiated the Kerzner International Project Manager of the Year Award given to one project manager yearly anywhere in the world that demonstrated excellence in project management.

- The Project Management Institute also gives out four scholarships each year in Dr. Kerzner's name for graduate studies in project management.

- Baldwin-Wallace University has instituted the Kerzner Distinguished Lecturer Series in project management.

- The Italian Institute of Project Management presented Dr. Kerzner with the 2019 International ISIPM Award for his contributions to the field of project management.

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Dr. Al Zeitoun is a Future of Work, business optimization, and operational performance excellence thought leader with global experiences in strategy execution. His experiences encompass leading organizations; delivering their Enterprise Digital and Business Transformation; guiding fitting frameworks implementations; and using his empathy, engineering insights, and collaboration strengths to successfully envision new business models and execute complex missions across diverse cultures globally.

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In his recent role with Siemens, he was a Senior Director of Strategy responsible for driving the global program management practices, Master Plan governance, and enabling the Strategy Transformation processes and priorities.

In his position, as the Executive Director for Emirates Nuclear Energy Corporation, Abu Dhabi, UAE, he was responsible for creating the strategy execution framework, achieving transformation benefits, governance excellence, and creating the data analytics discipline necessary for delivering on the $40B complex country energy mission roadmap.

At the McLean, USA HQ of Booz Allen Hamilton, Dr. Zeitoun strategically envisioned and customized digitally enabled EPMO advisory, mapped playbooks, and capability development for clients' Billions of Dollars strategic initiatives. Furthermore, he led the firm's Middle East North Africa Portfolio Management and Agile Governance Solutions.

With the International Institute of Learning, Dr. Zeitoun played a senior leader and global trainer and coach. He was instrumental in driving its global expansions, thought leadership, and operational excellence methodology to sense and shape dynamic ways of working across organizations worldwide. He speaks English, Arabic, and German and enjoys good food, travel, and volunteering. Dr. Al Zeitoun can be contacted at zeitounstrategy@gmail.com