

Mindset Before Method: Why PMBOK® v8 Fails Without the Right Starting Approach ^{1, 2,3}

By Kenneth R. Bainey ⁴

Abstract

Over the years, I have seen organizations blame PMBOK® standard when project management rollout fails. In many cases, the problem is not the standard. After decades of working with projects, I have seen organizations invest heavily in governance, templates and methodology while overlooking how their people think about project decisions. PMBOK® v8 gives us an opportunity to correct that sequence. This article explains why I believe mindset must come before method. It also argues that framework adoption begins with an operating approach, not paperwork, and shows what happens when that order gets reversed.

The Rollout That Looked Perfect on Paper

I sat in meetings where a new project management PMBOK® framework was launched with considerable enthusiasm. The steering committee was established. Governance roles were documented. Templates were approved. Risks, Assumptions, Issues, and Dependencies (RAID) logs templates were ready- the four categories most PMOs track using a log. Stage gates processes were mapped onto the organization's delivery lifecycle. On paper, the framework looked excellent.

Six months later, the templates were still there. No one was using them how they were designed to be used. Status reports had become theater. Risk registers were populated the week before steering committee meeting and ignored after the next week. The framework hadn't failed. It had never actually started. This is the pattern I want to mention, because I think most of the industry misdiagnoses it. **Organizations don't fail at PMBOK® because they lack process. They fail because they skip the mindset shift that must happen before process means anything.**

Why More Process Doesn't Fix an Operating Approach Problem

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² Article 1 of 7 in a series drawn from The PMBOK® v8 Application Playbook

³ Editor's note: This article is not a criticism of PMBOK8. The author is a strong supporter of PMBOK, PMI, and the v8 standard. He served as a practitioner reviewer for both PMBOK Guide v7 and v8, and the entire premise of the Playbook and this article series is built on top of the standard, not against it. The series exists to help practitioners apply PMBOK v8 more effectively in the field — it's a companion to the standard, not a critique of it.

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I have seen the same reaction many times. When delivery begins to slip, management reaches for more control and structure: another gate, another approval, another report, compliance check. I understood that reaction when I was sitting on the executive side of the table. The problem is that more control and structure does not necessarily produce better judgment. It is the solution that is closest to hand, and it produces something you can point to in a steering committee deck. But it almost never works, because the underlying problem isn't structural. It's behavioral.

A team that treats PMBOK® as a compliance obligation will find a way to comply with anything you build. A team that treats it as an operating system will find a way to make almost any process work.

Approach is the difference between a project manager who updates a risk register because the template requires a weekly entry, and one who updates it because they've internalized risk identification as part of how they think about the work in front of them. A fool with a tool is still a fool. Handing someone a template doesn't change how they think, it just gives them a new place to put the same old habits. If you want a PM who actually thinks that way, you change how they see the job first. The tool comes after.

The Exam-Book Trap

I'll say something that has generated more pushback on LinkedIn than almost anything else I've written: most people learn PMBOK® as an exam book, and then they carry that approach into the job. They learn it to pass a test, they pass the test, and the standard becomes something they memorized rather than something they operate. This isn't a criticism of PMP® candidates, it is a criticism of how the industry teaches the standard. We optimize for recall under exam conditions, not for judgment under project conditions. Those are different skills. And only one of them holds up when you're sitting in front of a steering committee that wants answers, a budget that just got cut, or a sponsor who's quietly stopped showing up to your meetings.

I spent a decade as CIO with the Government of Alberta, and the PMs I trusted most were rarely the ones who could recite the performance domains. They were the ones who had internalized *why* the domains existed, who could tell me, without opening a binder, why a stakeholder engagement gap in month two was going to become a scope gap in month five. That's the approach. It doesn't show up on a certification transcript, and it can't be installed through a template.

PMBOK® v8 Was Built with This in Mind

What I find encouraging about PMBOK® v8 is that its principles-based structure gives practitioners a real opportunity to start with the right approach. The principles are not simply an extra section added to the front of the guide. They are meant to help shape decisions and provide a practical lens for working through the performance domains and delivery approach, rather than being treated as an introduction to read quickly before moving on to what people see as “the real content.” When organizations adopt PMBOKv8 by jumping straight to the performance domains and skipping the principles as anything more than a formality, they have recreated the exam-book

trap at an organizational level. They have built a governance structure without building the approach that governance structure depends on.

This is the single largest gap I set out to close in *The PMBOK® v8 Application Playbook*: the standard tells you what good project management looks like. It doesn't, on its own, tell you how to shift a team or an organization from a compliance approach to an operating approach. That shift has to happen deliberately, and it has to happen first.

What a Mindset Reset Actually Looks Like

Changing the mindset does not require an offsite retreat or another culture workshop. It starts with a few simple conversations before the organization becomes focused on templates.

From what I have seen, people first need to understand the approach the organization is trying to create. I would say it plainly: **the goal is not simply to comply with a process; it is to use the process to support better judgment and better decisions.** That helps people see project management as something that supports the work, not another administrative requirement.

Project artifacts also need a clear purpose. A risk register should not exist simply because the methodology requires one. It should help the team identify uncertainty and make decisions. Instead of asking, “Have we completed the risk register?” I would rather ask, **“What risk are we reluctant to discuss, and what decision are we delaying because of it?”**

Leadership must also model the behaviour it expects. Sponsors and senior leaders should participate in the same conversations and ask the questions they want project teams to ask. I have seen one good question change the tone of a meeting. An engaged sponsor said, **“Walk me through the trade-off, not the status.”** In my experience, moments like that can influence project behaviour more than another template, procedure, or months of methodology training.

The Cost of Getting the Order Wrong

Organizations that skip this step don't usually fail outright. That's what makes the mistake so persistent, it's rarely fatal, just expensive and slow. What you get instead is a permanent layer of shadow work: the real decisions happening in hallway conversations and private one-on-one chats, while the “official” PMBOK®-aligned process runs in parallel, mostly for show. PMOs spend their credibility keeping a governance structure alive that people fill out but don't actually think about accountability performance. Project managers burn out maintaining two systems, the one that satisfies the audit, and the one that actually gets the work done. And leadership, looking at a fully “PMBOK®-compliant” organization that still can't deliver consistently, concludes the standard doesn't work. It wasn't the standard. It was the sequence.

Where This Leaves Practitioners

After more than forty years around technology and projects, I am less impressed by the sophistication of a methodology and more interested in what people actually do when a project becomes difficult. Whether you are starting a PMBOK® v8 rollout or trying to understand why an earlier one stalled, ask one question first: **have we changed how people think about project decisions, or only changed what they are required to fill out?** Answer that honestly before introducing another template, because the principles, performance domains, and delivery approach only work when the underlying mindset is in place. That is the foundation for the rest of this series, with the next article moving from approach to principles as practical tools for making difficult project decisions under pressure.

About the Author



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Kenneth Bainey is a retired Chief Information Technology Officer and project management professional with more than four decades of experience across public, private and academic sectors-- technology modernization, consulting, teaching, and executive delivery leadership. He has led and advised on complex projects involving governance, digital modernization, stakeholder alignment, risk, performance management, and organizational change. He is a part-time lecturer in project management and has taught PMP® preparation and applied project management in Canada, the United States, Europe, and the Caribbean.

He holds an MBA from Edinburgh Business School (UK) and a BSc from the University of Alberta, along with graduate Civil Engineering studies at the University of Calgary. He also holds multiple professional designations, including PMP, P.Mgr., BETI, CMgr., CIM, and CCP.

He is the author of two foundational textbooks: *Integrated IT Project Management* (2003), Artech House Engineering publisher; and *Integrated IT Performance Management* (2016), Taylor and Francis publisher. Both books focus on moving organizations from rigid processes and reporting to genuine performance, value, and accountability.

He was also one of the reviewers of PMBOK® Guide v8 and v7, contributing practitioner insights into how principles, performance domains, and value concepts can better support real delivery. In 2020, he received the PMI Global Eric Jenett Project Management Excellence Award, recognizing his sustained contributions to the profession. Ken can be contacted at ken.bainey@shaw.ca