Certification Program:

Approved Consultant & Educator For Project Business Management

A Personal Note

The market for educators and consultants in project management is changing. In some areas even deteriorating.

Project managers are our main audience that we serve as experts. However, professional requirements for them are partially shifting away from what we offer. While we mostly teach and consult project management as a stand-alone discipline, for a majority of them, project management is business. Their job is to bring money home in projects as profit centers. Others are on client side and have to manage project supply networks, that are far less well engineered and understood than for example supply chains in manufacturing and operational services.

This brings challenges to our business, but also new opportunities. Here is one.

Today I invite you to join me and meet the need for skill builders in the emerging market of Project Business Management. The qualification program is offered by Project Business Foundation and open to experienced instructors, coaches, etc. It is intended to satisfy the need of the market for experts, who can demonstrate knowledge and professionalism.

Addressing this need will require you to gain new knowledge, but may yield additional income, better than what you have today.

Together, we can turn the need into a functioning market.

Kind regards,

Oliver F. Lehmann, MSc, ACE, PMP
Trainer

Certification for Skill Builders in Project Business Management

Contents

Executive Summary

Learning by trial & error?

Trial in projects under contract is expensive. Error even more.

Educators & consultants are needed to step in and help make these projects successful.

There is an opportunity emerging for educators and consultants to outrun the pack and win new high-value business with virtually zero competition:

Today, many projects are no more done internally and cross-functional, but cross-corporate under contract. They require special skills to avoid costly failures and ensure the delivery of great successes.

This requirement in project managers has so far been mostly ignored by educators and consultants and must be acquired by trial and error. However, for both sides, clients and vendors, trial is expensive and error even more.

Help is needed.

It is measurable: The percentage of cross-corporate projects is growing (p. 12). This opens new opportunities for skill builders, such as trainers and consultants as early adopters (p. 10).

To get a head start in this business, they can now get qualified as

ACEs for Project Business Management

and help organizations as **Approved Consultants & Educators** meet project objectives as much as commercial goals.

The ACE program is self-paced and cost-efficient, but still challenging for the candidate. It takes the person on a discovery journey with a final attainment that signals subject matter expertise and skill building proficiency to a market in dire need.

Glossary

ACE	Approved Consultant and Educator
Agile Methods	Methods for projects that are based on bottom-up approached and short learning cycles.
Contract	Here: Legally enforceable agreement, commonly for the project vendor or service provider to deliver project work or results and for the customer to pay for it in time
Cross-corporate project	A project done jointly by several organizations, typically in a customer-contractor relationship under contract
Cross-functional project	Internal project
Customer project	A project executed by a performing organization for a (mostly) paying customer organization. Most customer projects are profit centers. Contrasts with Internal project.
"Mission Success First"	Achievement paradigm in Project Business Management[1]
PBP	Project Business Professional
PBM	Project Business Management
Project business	The business done by organizations to sell project work and by others to buy it. The business is then generally performed under contract.
Project Business Management	The discipline of managing a customer project in a way to bring money home and make the customer happy. Is also used to manage vendors on customer side, from simple customer-contractor relations to complex project supply networks (PSNs).
Project contractor	The party obliged to deliver project services to the project customer
Project customer	The party obliged to pay for project services and results delivered by the vendor
Project Supply Network	A complex and often highly dynamic system of contracts with customers, contractors, subcontractors and so on that spans over three or more tiers
PSN	Project Supply Network
VUCA	Volatility – Uncertainty – Complexity – Ambiguity; VUCA is often considered the big challenge for management. Project business helps manage VUCA, but also adds new layers to this challenge.

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[1] (NASA, 2000)

The Certification Program, Who Can Benefit?

ACE for Individuals

The ACE program qualifies individuals as experts to act in the overlay area of project management and business management.
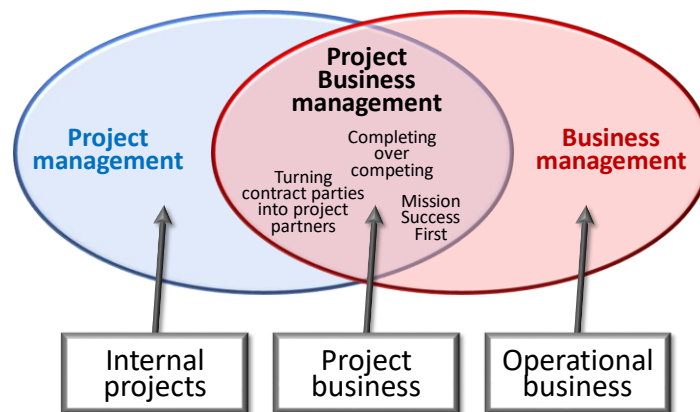

Figure 1: Project business management brings together the skills of project and business management (see Glossary on page 6)

The program addresses experienced skill builders from both project management and business management, such as:

	Project Management	Business Management
Trainers	X	X
Coaches	X	X
Mentors	X	X
Consultants	X	X
Academic instructors	X	X
Authors	X	X
Researchers	X	X
Project governance experts	X	X
Seasoned practitioners	X	X
PMO[2] staff	X	
CoE[3] staff		X

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[2] PMO: Project Management Office
[3] CoE: Center of Excellence, expanding PMO work for the specific requirements of customer projects

Prerequisites for candidates who want to participate are described on page 22. First experience shows that the business value for holders is superior and justifies significantly higher rates than what "normal" project management education and consulting pays.

ACE for Organizational HR Development

Corporations, Academia, and other organizations active in the field of skill building that are interested in utilizing the program as a development endeavor for their employees and partners such as consultants and trainers are welcome and programs for them can be launched.

Fee

There is no fee for an individual participant, as the certification is free.

However, the applicant pays a fee to the assigned assessor of EUR 2,198 ([exchange rate](#)). Discounts apply for groups of three or more candidates.

Group billing and discounts are available.

There is also a trainer-led version for Academic institutes, training providers, and consultancies.

Inquiries can be directed to oliver@oliverlehmann.com.

The ACE Certificate

ACE Program Vision, Mission, Goals, and Benefits

Vision

Replacing trial and error in Project Business Management with professional education and assistance while opening a new business opportunity for educators and consultants

Mission

Qualifying experts and skill builders for companies to improve client-vendor relationships and boost the success of their contracted projects.

Goals

1. ACE for Project Business Management – a signal of formal qualification for experts, which gives credibility to win training and consulting assignments in project business management and perform it successfully.

2. A selection signal for organizations seeking trustworthy experts to improve project success in commercially performed cross-corporate projects.

3. An expert qualification for further research and development in the field.

Benefits for the Individual and for Employers

1. Opening of a so far undiscovered market segment for education and consulting.

2. Access to training materials that allow adaptation to own formats and expansion with own materials, enabling quick development of offerings to customers.

3. Membership in a community interested in jointly developing the market and the skills of the community members.

4. Trainer credential to validate knowledge in project management and project business management to the market.

Consulting/Education in Project (Business) Management – Where is the Market?

There are various organizations in need of Project Business ACEs, including:

- Commercial project service providers and product vendors
- Prime contractors and subcontractors commercially engaged in Project Supply Networks (PSNs)
- Project customers
- Individuals as project freelancers
- Other parties involved in cross-corporate projects

In contrast to the project management education and consulting market, which is mature and driven by established providers, in project business management, it is still in its infant shoes, as is shown in Fig. 2. The market is tested and is receptive, but the value of training, consulting, and other forms of skill building still needs to be shown to prospective customers.
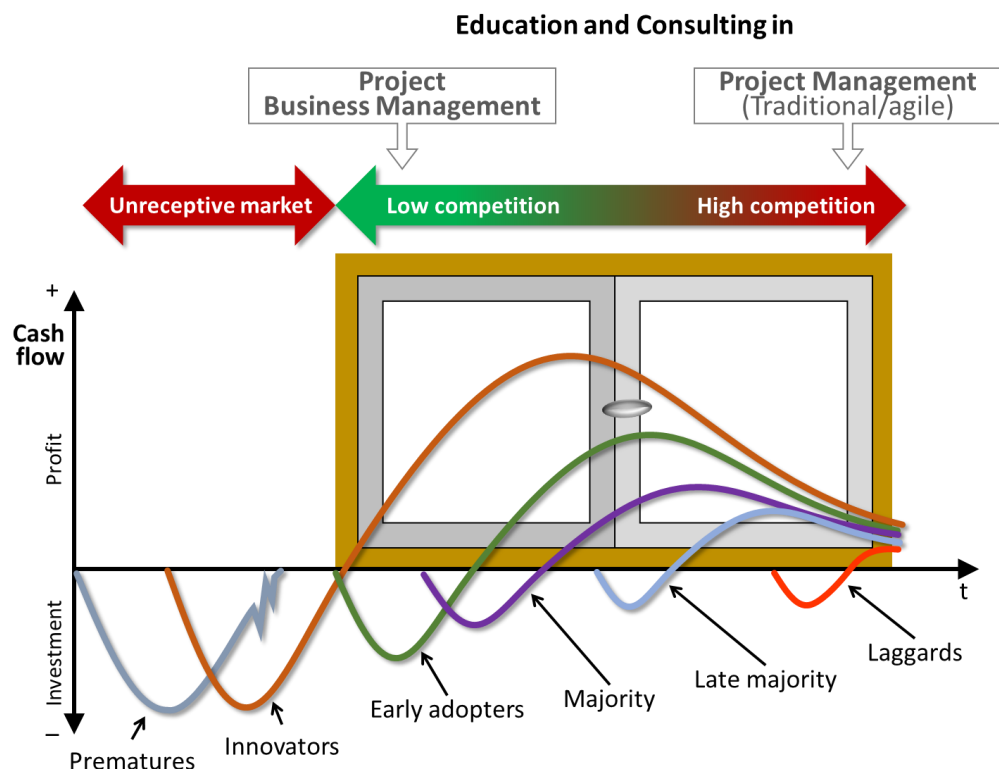

Fig. 2: PBM education & consulting placed inside market window theory. 2019 is the time for early adopters to join.

For market participants, the future customers of the ACEs, project business is high risk business. This is true for all parties involved. It is often underestimated how a combination of high uncertainty and high stakes influence the dynamics of success and failure in the

field, and the costs of failure can be high. The need for the development of specific proficiency is high, but the challenge of monetarizing it for a skill builder will depend on the person's ability to turn need into demand and demand into business.

How this is achieved is shown in Fig. 3. The need exists without questions, and prospective education and consulting clients need to be shown that opportunities exist to improve their projects to make them want help. Professionalism and practical solutions are then offered to give the clients effective help and monetize the business for the skill builder.

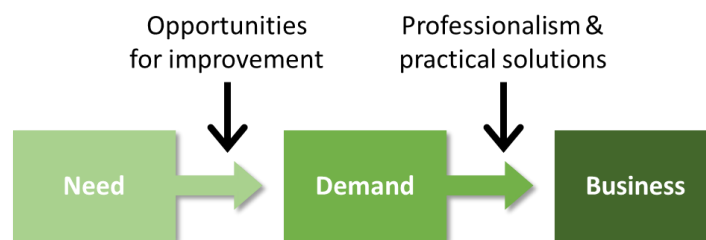> Project business is high-risk business for all parties involved.

Fig. 3: The path from "Need" to "Business" is challenging in two aspects: Directing prospects to opportunities for improvement and highlighting their own qualification for the job.

The Trend

Fig. 2 showed that providers of project management training and consulting are facing a degree of market saturation, characterized by a trend towards stagnation and price competition.

In earlier years, competition was to some extent dominated by individuals and corporations with limited professionalism, who hoped to make quick and easy money. Today, these competitors have either improved the quality of their offerings or went insolvent. The market in the year 2019 is mostly driven by experienced and capable providers with good reputation. This makes it different to separate oneself. The result is competition in fees more than in performance.

> There is a robust and measurable trend towards cross-corporate projects.

Traditional skill building in project management has achieved a lot. With its focus on internal projects, it has effectively helped the profession develop the skills needed to perform internal, cross-functional projects with a limited degree of procurement. It gives organizations the adaptability, agility, and the ability to cope with a growing number of challenges, including change, innovation, and an avalanche of new regulatory requirements.

There is however a measurable trend towards cross-corporate projects. Research shows a robust trend for Make-or-buy decisions towards the *Buy* option for the recent past, and the expectation that the trend will go on in the future. Two surveys from 2018 (590 respondents) and 2021 (326 respondents) showed almost identical results: A strong trend towards Buy over Make.

Fig. 4 shows the results of the 2021 survey[4].

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[4] Survey results have been published in PM World Journal (Lehmann, 2018)

Make or Buy in Project Business – What is the Trend?

28.2% / 29.1%   67.2% / 66.3%

■ Past experience
■ Future expectations

n = 326

-3	-2	-1	0	1	2	3
6.1% / 7.1%	10.7% / 10.1%	11.3% / 12.0%	4.6% / 4.6%	17.5% / 19.9%	29.8% / 25.8%	19.9% / 20.6%

◄ More often "*Make*"   More often "*Buy*" ►

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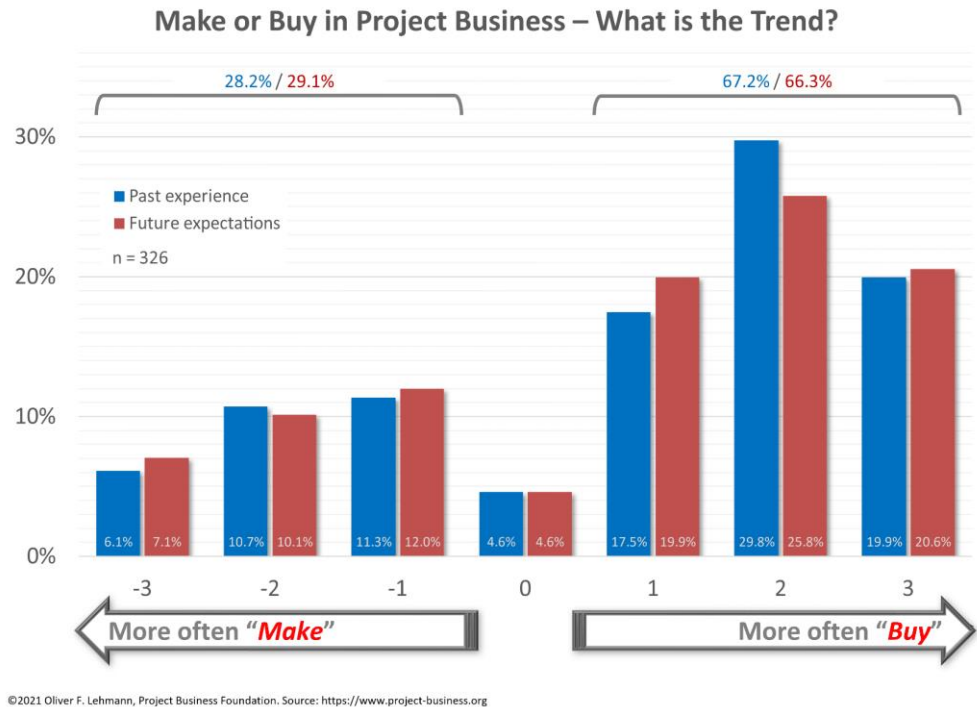
Fig. 4: The results of a survey made in 08-2021 show a strong trend towards the "Buy" option.[5]

This result was confirmed by surveys done between 2015 and 2019 (Fig. 5). In the first survey, slightly more project managers responded that they were in customer projects. In the following surveys, the difference was even larger.
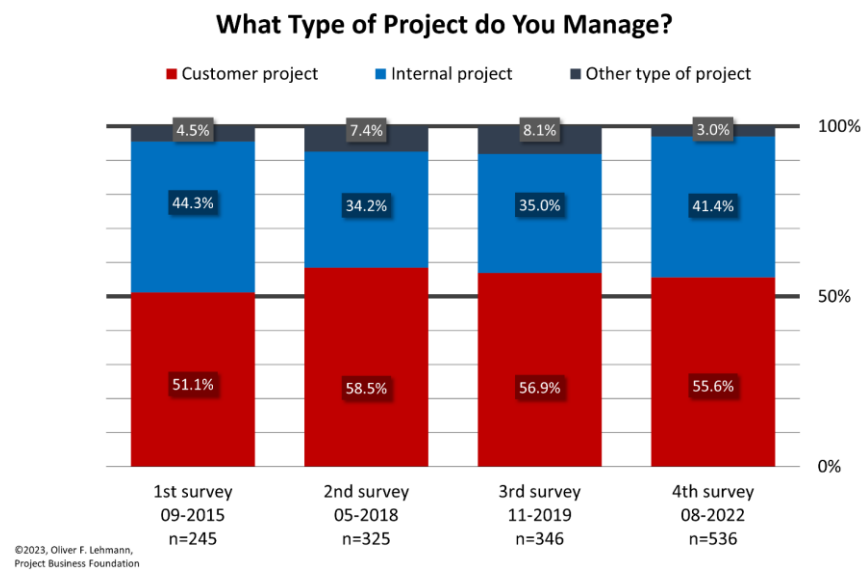

What Type of Project do You Manage?

■ Customer project   ■ Internal project   ■ Other type of project

	1st survey 09-2015 n=245	2nd survey 05-2018 n=325	3rd survey 11-2019 n=346	4th survey 08-2022 n=536
Other type of project	4.5%	7.4%	8.1%	3.0%
Internal project	44.3%	34.2%	35.0%	41.4%
Customer project	51.1%	58.5%	56.9%	55.6%

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Project Business Foundation

Fig. 5: Results of several other surveys confirm it: More than 50% of project managers reported that they do customer projects.

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[5] (Project Business Foundation, 2021)

The trend has two aspects:

- Project managers manage customer-facing projects for paid contractors.
- Project managers lead contractors instead of their own internal teams.

A special group includes project managers working for prime contractors or other forms of "in-betweeners". These companies are, at the same time, contractors to customers and customers of their subcontractors, as shown in Fig. 6.
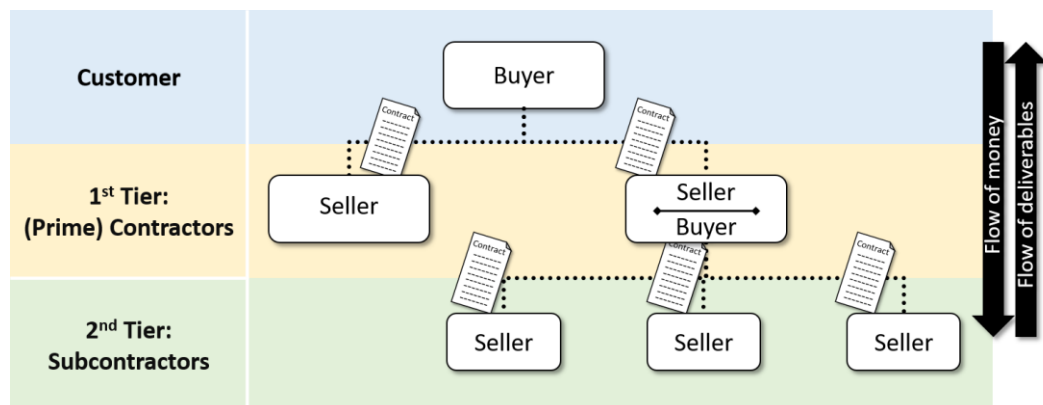

Fig. 6: A simple project supply network with a prime contractor, which is at the same time customer (buyer) and contractor (seller).

In both cases, commercial and legal knowledge is needed on top of project management knowledge, as well as the ability to lead in a cross-corporate and connective way. When skill builders ignore these upcoming needs, they risk that their market is shifting to new topics, and they remain left behind.

Obviously, this process is already underway. The ACE for Project Business Management offering for skill builders in project business management helps keep track of future market needs.

Agile Methods

Agile methods are widely applied in project business. A problem is that they have been developed with a focus on internal projects and are so far not geared up to include commercial topics.

While some basic work on the topic has already been done, further research and methodology development is needed to adjust these methods to a commercial environment with project customers[6] and contractors.

ACEs will be encouraged to add knowledge, experience, and insights to that.

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[6] The use of the word "customer" in publications on agile methods leaves it generally unclear whether a real, paying customer is meant or a model construct, such as an "internal customer", who does not bring profit to a vendor organization.

VUCA

VUCA stands for Volatility – Uncertainty – Complexity – Ambiguity.

Mastering VUCA is considered the supreme challenge for managers today. By making organizations more proactive and reactive, doing projects as businesses help manage VUCA. However, it also appends further layers of volatility, uncertainty, complexity, and ambiguity to projects and adds business risks to project risks.

ACEs must develop an understanding of how project business can help managers cope with the challenges of VUCA without devastating the project and possibly entire organizations.

Low-Hanging Fruits

Project customers are challenged by bringing strangers into the project.

The customer side of the business is comparatively easy to win as customers by turning need into demand and demand into ACE business. These companies are used to seeking help for their problems from outside the organization for their internal projects. When they outsource/out-task project work, they will simply follow the habit and try to find consultants and educators as experts.

Their problem today: They will not find these experts. There is no certification available for them and no signal that a person has passed such a qualification.

High-Hanging Fruits

Project vendors are challenged by winning good business and then running the project as a profit center.

Given the survey results above, vendors are the much larger market. However, these companies are not used to looking for outside help to improve their customer business. Faced with high risks from their customer projects and with a business situation for many of them, who barely survive from paycheck to paycheck with the imminent threat of insolvency hanging over them, they often need even more help.

It is also interesting to see the amounts of money at stake for these "JAMs" (= Just about managing). Helping protect this money for project contractors is a strong business case for a consultant and educator.

Project Business Management Needs Skill Builders

What are the drivers of the observed change?

The big organizational tasks of today, such as increasing agility, ensuring strategic alignment, and developing future-proof products and services for fast-changing markets, cannot be done by organizations in isolation. They need support from external providers, who then become project contractors.

Those who have the knowledge will need to find customers to monetarize their skills.

Project Business Management means tapping into the assets of other organizations and turning them into project resources.

On the way from internal, cross-functional to cross-corporate projects, there are major challenges for organizations and individuals on both sides of a business relationship, and they are poorly prepared to master them. The core challenges are depicted in Fig. 7.
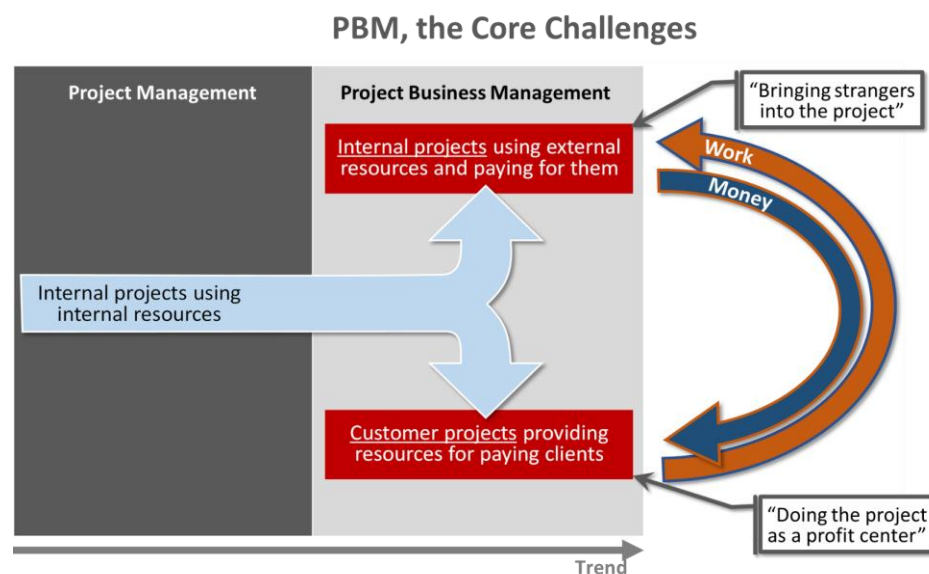

Fig. 7: The core challenges of project business management on both sides of the negotiation table

For individuals and organizations acting as skill builders and ACEs prepared to help meet these challenges for the good of the client and their own business, a door to a mostly ignored market opens, promising low competition and a high reputation. However, this needs professional preparation.

The qualification program helps provide confidence that a person can satisfy this need and validates the person's expertise in the topic. It helps the skill builder and the organization for which the person is working to turn need into demand and demand into valuable education and consulting business.

In a Nutshell: The Certification Program

The program will consist mostly of self-directed development work. Out of a selection of currently eight topics, candidates will be required to select three for their work, or add own topics, and develop submission (potentially usable educational materials) based on pre-defined sources or other sources that have a similar relevance and quality.
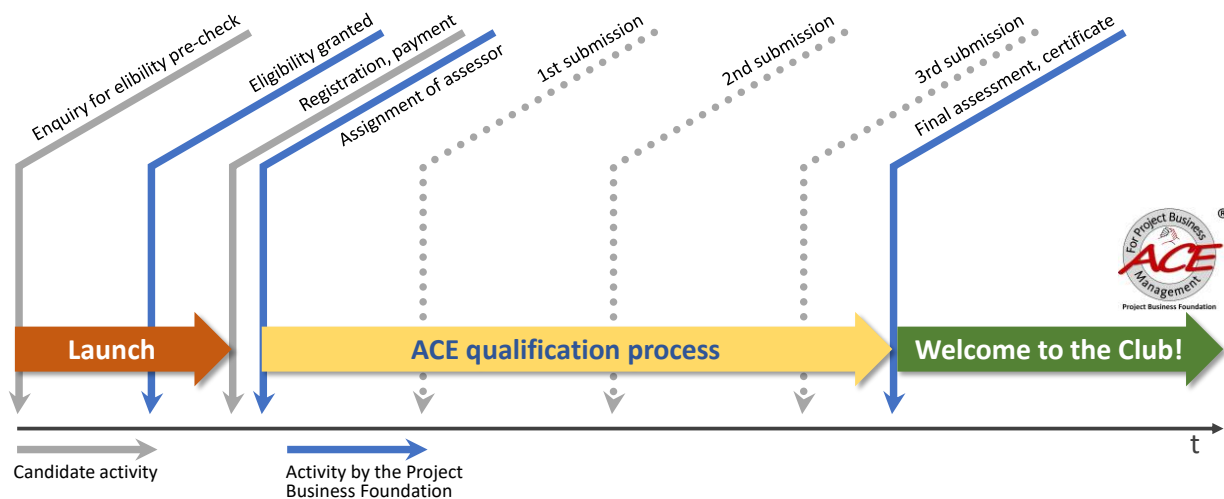
The ACE Qualification Process

Figure 8: The ACE qualification process

The Sources

Two books are currently accepted as resources to work upon during the qualification:

Literature helps meet the criteria to become accepted as an ACE.

The Project Business Compendium
by the Oliver F. Lehmann, Project Business Foundation (2023)
Download from
[(in preparation, publication expected by March)](#)

Project Business Management
by Oliver F. Lehmann (2018)
Taylor & Francis
ISBN: 978-1138197503[7]

The book "Project Business Management" can be ordered in bookstores. It is also available as digital version (Kindle, eBook, etc.).

There is also a series of articles by Oliver Lehmann published in PM World Journal, archived in PM World Library and in academia.edu.[8]

Candidates are free to add further references, which they consider helpful, such as other books or articles that deal with related topics. No specific format is required for referencing, but all sources used must be named.

For each study topic chosen from the list below, at least one of the pre-selected sources must be used. Candidates can use additional sources that they find appropriate, including papers, podcasts, videos, and similar. In such a case, the additional resource must be freely accessible online.

All references must be made in such a way that they can be directly verified, e.g., by including page numbers in text documents or time positions (min./sec.) in videos and podcasts.

Note: Plagiarism will lead to radical exclusion from the program. As proper bibliography increases the chances of success for the candidate, it is not in the interest of the candidate anyway.

Study Topics

> Candidates work on five topics related to doing projects as a business.

Candidates will be required to select 3 out of 8 topics and develop their own learning materials as submissions from them:

Topic 1:   **Processes for Business Development**
Describe the different processes and explain for each of them benefits and disadvantages, clarifying when they should be favored, and when not.

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[7] Details at https://www.routledge.com/9780367522070 .
[8] The impression that there is a scarcity of literature on Project Business Management is correct. ACEs are encouraged to add own books on the topic.

Topic 2: **Matching Contract Types and Project Types**
What should be the influencing factors to select certain types of projects. Dependent on the type of project and other influencing factors, when would you recommend certain contract types?

Topic 3: **Teaming Agreements**
Teaming among contractors for the benefit of the project and the business that it brings can be done in different structures. What structures do you know, and what benefits, disadvantages, and risks come with them?

Topic 4: **Bilateral Contracts v. Multilateral Contracts**
What are the specific benefits and disadvantages of these contract types? What are project alliances and customer-led consortia and how can they influence project success?

Topic 5: **Improving Cross-Corporate Relations During the Project**
The collaboration of organizations during a project can be harmonious and satisfying. It can also turn into a hodgepodge of conflicts and dysfunctionalities. How can the latter be avoided and a "Mission Success First" approach be ensured?

Topic 6: **Managing and Resolving Crisis in the Project**
Crises in cross-corporate projects often have their origins at the interfaces between the organizations. What kinds of crisis can develop there, and what can be done to avoid or resolve them?

Topic 7: **Securing the Timely Flow of Money and Project Results**
In contracts, how can parties ensure the mutual meeting of obligations and how does this influence the ability to work together as contract parties and project partners?

Topic 8: **Roles and Structures in Organizations that Participate in Project Business**
How should the role of the project manager and of other participants in the various parties be defined and organized? How do they affect project success?

Candidates are free to propose one or more own topics as alternatives to the topics above before they start working on them. The assessors will then decide whether these topics are acceptable, which would mean that they can be used for the Certification program.

Submission Formats

> Candidates are free to choose the submission format.
>
> Content counts.

Candidates have great freedom in choosing the format for the study results that they like. Here are examples of acceptable formats:

Free speech: Recorded as a video or performed life (online or in person), the candidate presents the study findings over a duration of 12 to 15 minutes.

Read discourse:	Recorded as an audio or video or performed life (online or in person), the candidate presents the study findings over a duration of 12 to 15 minutes.
Narrated presentation:	Created with commonly used and easily playable software, 12 to 15 minutes with narration. Can also be submitted as a digital video in a commonly used format.
Unnarrated presentation:	Acceptable for special topics that do not require narrations, e.g. because they are built around graphics.
Recorded discussion:	A discussion on one of the topics between two or three persons recorded as an audio or video (12 to 15 minutes).
Recorded interview:	A talk with a practitioner, a manager in project business or an expert. Over 12 to 15 minutes, the candidate shows his/her ability to make the person speak about project business management topics.
Recorded training session:	Recorded as a video or performed life (online or in person) before a group of classroom attendees, the candidate presents existing knowledge or findings of a new study over a duration of 12 to 15 minutes.
Paper or article:	In a commonly used text format. 2,500 to 3,500 words (excluding bibliography).
Audio recording:	12 to 15 minutes in the style of a podcast on a topic of project business management.

Other means of communications can be acceptable, if they are innovative and lead to interesting results. If in doubt, ask the assessor.

For recorded sessions, a transcript will be welcome, particularly if the audio channel is hard to understand.

Candidates will be expected to finish and submit their work in 3 months.

Candidates may ask for additional time in case of extraordinary, serious, and unforeseen difficulties to finish the work in time, such as illness or accidents. Resubmitted failed submission may also lead to an increased duration, as discussed below.

If other individuals are presented in the submissions as images or in videos, or when materials from other parties are being used in the submission, it is in the candidate's responsibility to ensure that matters of privacy and copyright have been arranged and clarified. This is of relevance when the participant wants to publish the submission on the website of the Project Business Foundation (see page 21).

The Assessment

Assessors will use a simple weighted system to score the submission:

Criterion	Weight (1 to 10)	Grade (0 to 10)	Score (Weight × Grade)
Demonstrated depth of understanding of the selected PBM topic	10		*(max. 100)*
Demonstrated ability to present knowledge in a comprehensible form	8		*(max. 80)*
Quotations and bibliography show knowledge of sources	6		*(max. 60)*
Provided knowledge that is useful for practitioners	5		*(max. 50)*
Established knowledge that can be a basis for scientific research	5		*(max. 50)*
Added new knowledge to Project Business Management	4		*(max. 40)*
		Total score:	*(max. 380)*
		Passing score:	Min. 285 (75%)
		Result:	[ ] Pass [ ] Fail

Students ascertain that the submission is their own work. Assessors are free to contact the candidates and ask questions on the topic to verify that they have developed the knowledge by themselves and can call upon it when asked.

In case of a rejected presentation, the candidate will be given the score report that shows where the work scored too low. The person will then be given another week to rework it or develop a new presentation and submit it again.

All three submissions must pass in order to consider the person qualified as ACE.

Timing

Attendees will be expected to finish the Certification process and complete the program in 3 months. This time is open for appeal if it is found to be too short. Attendees will receive their assessment results typically 2 weeks after submission.

Copyright of Submission Put Forward

The copyright of all submitted materials remains with the candidate. These materials may be published by the author or used in any other form that the person chooses.

Publication at the Project Business Foundation

Candidates are encouraged to offer their submissions to the Project Business Foundation for publication. There is a specific author agreement to ensure the author's retainment of copyright and for the Project Business Foundation to remain indemnified from privacy and copyright uncertainties.

Public Registry

An online registry will be installed as soon as a sufficient number of candidates have passed and are considered qualified to help ACEs verify and promote their status. Prospective customers of their services may also use it to find consultants and educators.

ACE-qualified persons will have an opt-out opportunity if they do not want to be named in the registry.

Educational Materials

Individuals who have successfully passed the ACE Certification will be given access to a collection of training materials, including texts, graphics, and presentation slides, that they will be licensed to use for three years. After that time, a small fee will be required to renew the license, but the ACEs will be free to use them further or use their own materials instead.

Enrollment, Prerequisites for Eligibility

The enrollment begins with your booking and payment at

https://my.project-business.org.

If you are uncertain, whether you meet the prerequisites for program enrolment, get a conclusive pre-check https://www.project-business.org/academy/ace-certification.

Group 1 – Experts

Candidates are expected to provide evidence that they have been active as consultants or educators in project management or in business management for at least one year. They can do this by submitting a confirmation letter from an employer or a customer detailing the educational or consulting assignments that you have done in broad terms.

Group 2 – Practitioners

Practitioners in project management or business management with at least 3 years' experience, who want to add consulting, training, or another form of education to their skill portfolio, are also welcome. They can provide evidence in form of formal degrees, such as:

-   Master of Business Administration (MBA), Master of Science (MSc) in a field related to project management or business management
-   IPMA[9] Level 'C' or higher
-   PMI[10] Project Management Professional (PMP)
-   PMI Agile Certified Professional (PMI-ACP)
-   PMI Business Analyst (PMI-BA)
-   APMP[11] Accredited Practitioner (APMP-AP) or higher

Or a similar degree from another accepted institution.

Alternatively, a confirmation letter from an employer or customer is also welcome.

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[9] International Project Management Association
[10] Project Management Institute
[11] Association for Proposal Management Professionals

How to Use the ACE Acronym and Logo, Renewal

Logo and Acronym Usage

After the successful finalization of the Certification program, you will be entitled to use the acronym "ACE" or "ACE-PBM" behind your name as long as you are a member of the Project Business Foundation.

You will be entitled to use the ACE-PBM logo in your advertising materials, including stationary and business cards.

Please note: The entitlement to use the ACE logo ends when you are no more an association member.

Figure 9: The ACE-PBM logo

Renewal

There is no formal renewal process to maintain the ACE status has no fixed term limit, and no new examination or collection of credit points is required to renew the term.

Instead, to ensure professional development of status holders, each ACE-approved person retains the status as long as the person remains the continuous affiliate membership at the Process Business Foundation. Being part of our activities to advance the discipline as an observer or contributor and staying up-to-date with development and discussions is the best way to grow in this profession.

The Project Business Foundation may alter this rule if a necessity emerges.

Contact

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Project Business Foundation (2021) *Market Report: Trends in Make or Buy Decisions*, [Online]. Available from: https://www.project-business.org/research/survey-market-trends (Accessed: 25 December 2022).

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