**Transformative Projects:
Liminality and Boundary Crossings
for Organizational Change**

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Imagine you are the head of operations at a prestigious family-owned newspaper. Suddenly the business is sold to a high-tech entrepreneur with no previous journalism experience.

Imagine that you are the head of marketing for a famous toymaker specializing in connectable blocks. Now new research indicates that children are spending much less time playing with physical toys and more time using computers.

Imagine that you are the head of customer relations for financial services firm. Your bank's reputation has been based upon your collaborative advisory services. However, your younger clients prefer to conduct business remotely via mobile digital tools rather than in person or by phone.
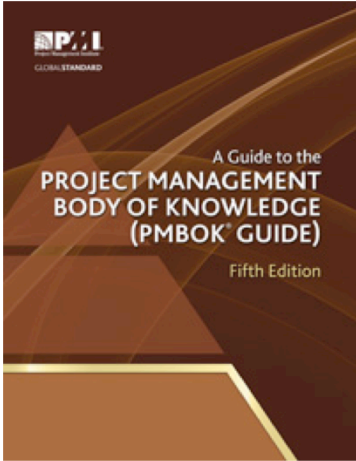
All of these scenarios describe an organization facing an identity crisis. In each instance, something has happened in the outside world that potentially threatens the product brand and disrupts the workplace culture. Successfully meeting the challenge will transform the enterprise. If you are the executive designated to deal with the problem, who are you going to call?
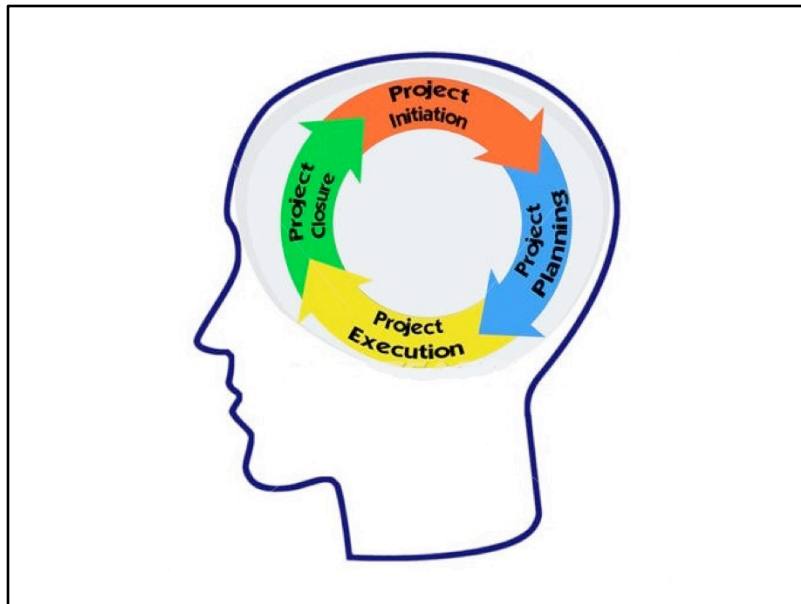
Most likely sooner or later you are going to call in a professional project manager. Like a shaman presiding over a sacred rite of passage, the project manager guides the organization through ceremonies of liminality to achieve a transformation.

Project Management Overview

- Developed in 1986

- Recognized by American National Standards Institute (ANSI) and International Standards Organization (ISO)

- Framework encoded in all project management software tools

- 580,000 certified Project Management Professionals worldwide

Project management as a human activity has existed since the dawn of civilization. The codification of project management methodologies occurred in the 1980's with the development of the Project Management Body of Knowledge. For project managers the PMBOK serves approximately the same function as the Generally Accepted Accounting Principles for accountants. It also contains the answers to the Project Management Professional certification exam. Presently there are more than 580,000 certified PMPs worldwide. Many organizations demand the credential as a prerequisite for hiring a project manager.

What is a "project"? For professional project managers, it is a "temporary endeavor to produce a unique product, service, or result." A project's outcome can be tangible (a building, an appliance, a film) or intangible (an event, a service, a process).

In the jargon of business, the opposite of a project is an operation. Operations are those regular, repetitive activities that keep the enterprise running.

Implicit in this definition is the idea that projects are all about change. Often the change is voluntary: an opportunity to increase revenue, expand market share, influence more hearts and minds. Sometimes the change is mandatory, as when disaster strikes, or a government imposes regulations, or financial losses imperil the business.

Upon the initiation of a project, the project manager gathers together representatives from different areas of the organization to form a project team. They collaborate to create and implement a project plan,

Transformative Projects and Liminality

Arnold van Gennep
1873-1957

Liminality

From the Latin word limen, "a threshold." During a ritual's liminal stage, participants "stand at the threshold" between their previous way of structuring their identity, time, or community, and a new way, which the ritual establishes.*

Victor Turner
1920-1983

Communitas

An intense community spirit, the feeling of great social equality, solidarity, and togetherness. *

*Wikipedia

A transformative project involves change that is radical enough to shake the foundations of the organization and cause silo walls to come tumbling down. Territorial, functional, and hierarchical boundaries must be crossed. People who previously had nothing to do with each other must find ways to communicate and work together. Traditional interdepartmental rivalries and grudges must be overcome so that an atmosphere of mutual trust and egalitarian discourse can be created. In Arnold van Gennep's terms, the core project team members enter a state of liminality during the organization's rite of passage. Victor Turner would recognize the creativity and productivity of a diverse project team as a manifestation of *communitas*.

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│   Liminality 3-stage model                    │
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│           • Separation                        │
│           • Transition                        │
│           • Re-incorporation                  │
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Liminality during group rites of passage among the tribes studied by early anthropologists often followed a three-stage model: separation, transition, and re-incorporation. Participants in the ritual disconnect from their ordinary roles, routines, and identities. They form an isolated, unified cohort for the duration of the process. At the end they re-enter the community with new status and responsibilities. Between and within each stage, ceremonies test the participants' valor and commitment and mark their progress.

A hundred years ago, the drama of these ceremonies might have involved masks, costumes, props, singing and dancing. Modern project management also depends upon ceremonies, but in the capitalist high-tech habitus the drama is enacted through documents, digital tools, and presentations.

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│   Project separation stage                    │
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│          • Project Charter                    │
│          • Kickoff Meeting                    │
│          • Collaboration Site                 │
│          • Privileged Access                  │
│          • Scope Document                      │
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The transformative project's separation stage begins with the issuing of a Project Charter. A senior executive sponsor formally announces the goal and bestows upon the project manager the authority to recruit a team, assign work, and spend money.

People chosen as core team members must largely withdraw from their normal operational duties and devote themselves to the project. They assemble for the first time at a Kickoff Meeting, where the project manager explains the goal and the success measures. In the era of paper files there was usually a special room set aside for meetings and repositories. Nowadays a collaboration site is created in cyberspace using tools such as Google Docs or Microsoft Sharepoint. Team members are furnished with badges to restricted areas, logons to secure servers, privileged access to confidential data. Collectively they develop a Scope Document that articulates their group vision of the process and outcome.

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Project transition stage

   • Stakeholder Analysis – assess the politics
   • Requirements Document – define the characteristics of the deliverables
   • Functional Responsibility Matrix – assign accountability and resources
   • Work Breakdown Structure – establish the work plan
   • Activity Network Diagram – map task dependencies
   • Critical Path Analysis – create the schedule and prioritize tasks
   • Gantt Chart – display work plan on a timeline
   • Risk Plan – clarify priority/ impact of future opportunities and threats
   • Quality Plan – define standards
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After the Scope Document has been approved by the sponsor, the project enters the transitional stage. Representing their different perspectives, the core team devises new workflows and systems that blaze boundary-crossing trails to arrive at the goal. They follow a sequence prescribed by the PMBOK.

This is a partial list; the larger the project and the stricter the industry's regulation, the more documents it contains. All of these plans serve to reify an improvisational fantasy born from the core team's experience of *communitas* into a tangible set of procedures that ultimately affects products, jobs, and markets. As the project moves forward, progress is tracked at regular ceremonial meetings where deliverables are inspected and performance is evaluated. The transitional phase concludes with the formal acceptance of the project's deliverables by the sponsor.

Project re-incorporation stage

- Lessons Learned
- Archival History
- Celebration
- Release of Team

During the final re-incorporation stage, participants attend a Lessons Learned meeting to reflect upon what went well and what caused problems. The project manager summarizes this oral group retrospective in a written history for the archives. There is usually a celebration at which food and drinks are served and speeches made. Members of the core team are then officially released and resume their former roles. Typically their work on the transformative project has conferred upon them higher status and more complex responsibilities.

Sacred Elements

Many projects reflect the three-stage model, but few can be considered rites of passage for an organization. A truly transformative project demands a degree of emotional involvement that blurs the boundaries of personal vs. professional, because the professional outcome will have an important effect on many personal lives. Faced with large uncertainties in their future, participants and stakeholders behave less like business colleagues and more like the sort of holistic communities ethnographers are accustomed to studying during fieldwork. The key distinguishing factor is the presence of the sacred.

Research examples

- Product brands
  - Brands as totems
    - Frederick Wherry
      - *The Culture of Markets*
  - Magical devices
    - Tanya Luhrmann
      - "What Students Can Teach Us About iPhones"
- Workplace cultures
  - Large organizations
    - Peter Drucker
      - *Concept of the Corporation*
  - Startup companies
    - Walter Isaacson
      - *Steve Jobs*
    - Nick Bilton
      - *Hatching Twitter*

Today the term "liminality" is applied to a wide range of experiences involving transitional phases and detached identities. Yet the original concept elaborated by van Gennep contained an element that has become diluted over time: the notion of liminality as a sacred state. For the purposes of this paper, our concept of the sacred focuses upon the social phenomenon Emile Durkheim described as a kind of impassioned groupthink that confers extraordinary powers upon the people whom it inspires and the objects they worship.

Within the capitalist, high-tech habitus of the modern organization this social energy comprises the *mana* animating certain product brands and workplace cultures. Research providing evidence of such magico-religious thinking is plentiful. Transformative projects create a perceived threat to this organizational *mana*, a potential boundary crossing for the product brand and the workplace culture from the sacred to the profane.

Ceremonies of trust

- Risk management process
- Worst case scenarios
- Contingency plans
- Test of faith in team members
- Revelation of mysteries

Effective risk management practices for transformative projects depend upon the participants' willingness to acknowledge the sacred dimension and respond with *communitas*. The disclosure of subject matter experts' worst-case scenarios and the development of useful, realistic contingency plans compel the project team to admit their vulnerability confronting forces beyond their control. Brainstorming mitigation tactics, they must have faith in each other.

Among the activities van Gennep describes within rites of passage is a ceremony where the participants are shown the most secret, mysterious, and powerful material objects and immaterial knowledge their tribe possesses. This too occurs in transformational projects. Before the core project team can finalize a requirements document or a work plan, they need to learn about many sensitive and confidential matters. In the case of the newspaper, it might be the unwritten rules of the editorial policies. For the toy manufacturer, it might be the accumulated wisdom of the quality control managers. The bank might have proprietary algorithms for securities trading or orally-transmitted traditions of providing special services to certain types of customers. Whether they are kept hidden deliberately as a defense against competitors or unconsciously through a tacit consensus about taboo topics, these sacra must be exposed to the core team on a transformational project if they are to be preserved in the future.

"Project Manager – The Shaman"
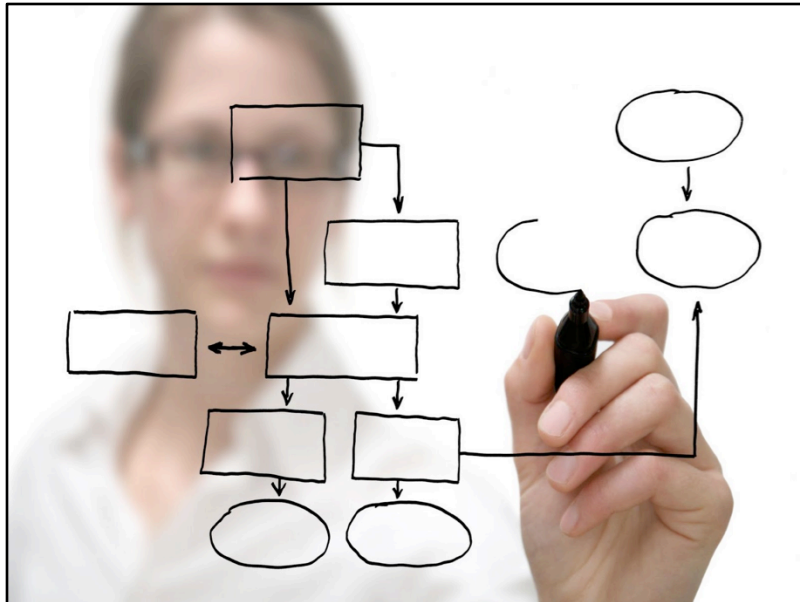
On mundane projects, record-keeping and report-writing consume most of a project manager's time and effort. Yet for a transformational project, senior management seeks leadership skills that require detailed knowledge of the PMBOK doctrine and practices, expertise in orchestrating teamwork and logistics, and charisma to persuade skeptical people that they should commit themselves. In other words: a master of ceremonies.

The ethnographic reality of this role was confirmed for me recently by an imaginative group of project manager colleagues. Last summer I was invited to Moscow to give a lecture for the local chapter of the Project Management Institute. Among the points I was hoping to make was the importance of understanding the organization's social dynamics and inspiring faith in the stakeholders that their lives after the project ended would be better than before. I thought that comparing the project manager to a shaman would be a helpful metaphor because the word "shaman" derives from a 17th-century term the Russians used to describe a spiritual leader among Siberian tribes.
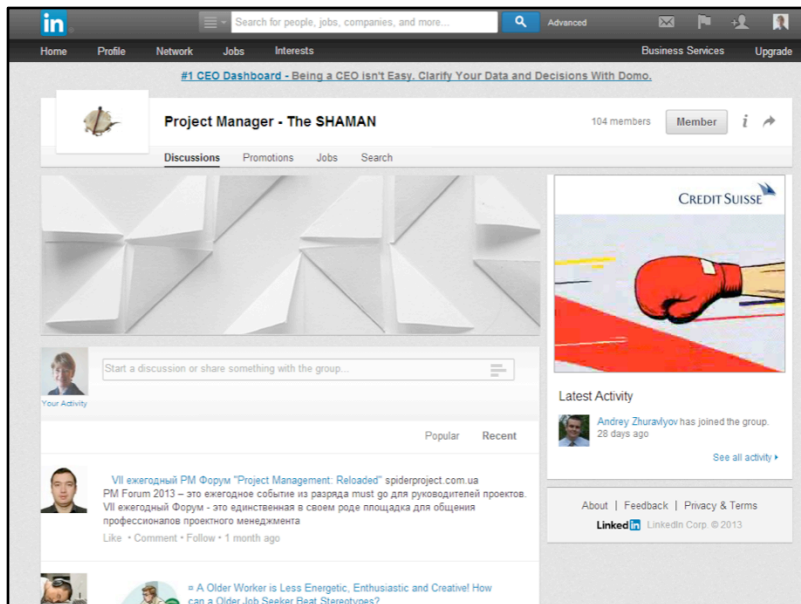
To my surprise, this idea turned out to be the highlight of the lecture. Soon afterward, a member of the audience created a LinkedIn group called "Project Manager - The Shaman." As of today the group has more than 100 members and many active discussions, mostly in Russian.

Schools that educate project managers do not include "Fundamentals of Shamanism" in their list of courses offered. I have taught project managers as a faculty member at the American Management Association for more than ten years, and terms such as *rite of passage*, *liminality*, or *communitas* have never been mentioned in any of our textbooks or exercises. Nonetheless, these same concepts are embedded in the curriculum for popular courses with titles such as "Project Team Leadership: Building High Commitment Through Superior Communication".

And so…

Scholars who study rituals might question the basic premise that an organizational project could be considered a rite of passage involving liminality and boundary crossings. Rituals, they might say, do not facilitate transformative change. Rather they serve to maintain stability and continuity, reinforcing traditions and ensuring the transmission of essential shared values while renewing the community's vitality. Yet within the context of neoliberal capitalism and technological productivity, projects in fact do fit this pattern. Creative destruction yielding continuous change is in itself the crucial tradition, the primary shared value, and the means by which capitalism and technology revitalize the communities they empower.
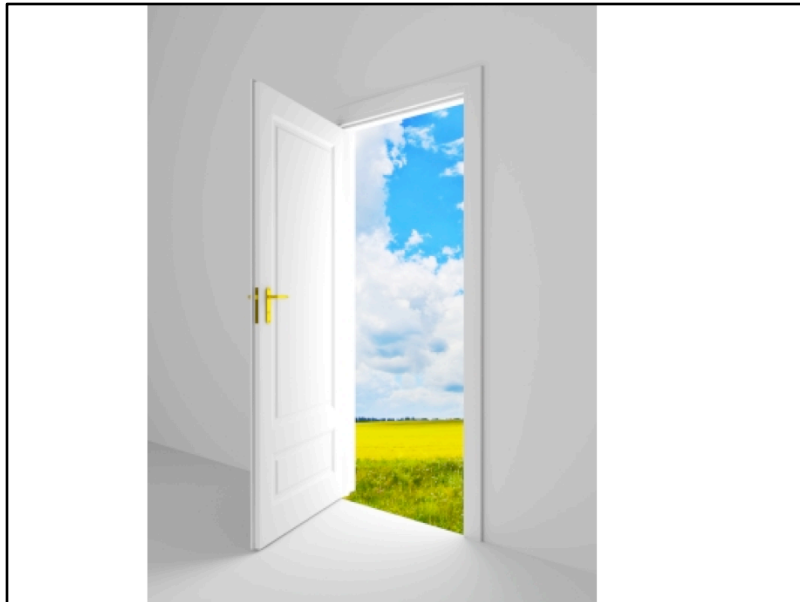
This paper has explored the ways in which transformative organizational projects resemble rites of passage. We have considered the three-stage process of liminality, the presence of a sacred dimension, and the similarities between a project manager and a shaman. Let us hope that project managers learning how to become better leaders will continue to expand their knowledge of the insights anthropology can offer. Meanwhile, more anthropology students in search of a future career will find that their understanding of rites of passage can be translated into leadership skills for project management.