

# 3

## Introducing the Logical Framework

*Make no little plans: they have no magic to stir men's blood  
and probably will, themselves, not be realized.  
Make big plans: aim high in hope and work, remembering that  
a noble, logical diagram, once recorded, will not die.*

—Daniel H. Burnham, American architect  
and urban planner (1846–1912)

## The Best Solutions Tool You'll Ever Find

In the 1970s, I worked with an innovative management consulting firm called Practical Concepts Incorporated (PCI), whose visionary founder Leon Rosenberg first developed the Logical Framework, to help the United States Agency for International Development (USAID) more effectively plan, implement, and evaluate the thousands of projects in the U.S. government's multi-billion dollar foreign aid program.

The LogFrame has since been widely adopted by the international donor agencies of Great Britain, Canada, Australia, Denmark,

and Germany. Parts of the World Bank and the United Nations. Several U.S. federal agencies (such as the Center for Disease Control) have adopted their own versions; some call it Logic Model.

My career mission is to expand the use of this methodology to corporate and technical arenas, through consulting, public seminars, and in-house workshops.

Private sector use is rapidly growing. Among our clients, Sony Electronics' TQM Black Belts found the tool valuable for internal consulting and quality improvement projects. DirecTV used the LogFrame approach to fight identity theft and turn high profile fraud cases over to the FBI. The Los Angeles County Assessor's office chose this approach for integrated planning to improve cross-department processes.

Application possibilities for the LogFrame are endless. Civic, voluntary and social organizations benefit from these same organizing principles. A New Mexico motorcycle club plans their annual children's toy runs this way. Girl Scout troops organize fund-raising campaigns. Churches develop after-school teen drop-in centers.

I first learned the power of systems thinking while coaching project teams in developing countries to design social and economic development projects. Working to solve difficult problems in complicated situations taught me to recognize the interconnection of issues and address them from a systems thinking perspective. The LogFrame makes that easy to do.

For example, a project to improve child mortality in Africa, may focus on nutritional education for mothers, but success also demands access to clean water and decent sanitation. *Strategy is all about managing webs of relationships.*

These projects typically dealt with hard-to-measure intangibles such as strengthening institutional performance, upgrading manpower skills, and changing cultural attitudes for the better. Your own projects may also involve processes, intangibles, and changes—tough topics to put your finger on. Bar charts cannot capture such intangibles, but the LogFrame does.

My greatest personal satisfaction comes from seeing my clients use what I teach them long after I depart from places like Thailand, which played an important role in refining these concepts. I was part of the original PCI team that trained Royal Thai

Government employees at the National Economic and Social Development Board.

Program attendees held senior government leadership positions, and many adopted the LogFrame as their way of doing business. The Bangkok Metropolitan Administration used LogFrame planning to move the world's largest outdoor marketplace—with nearly 15,000 vendors selling everything imaginable—to its new location at Jathujak. Dr. Sudjit Nimatkul, a program participant, applied these methods in his subsequent role as Governor of Phuket.

Many years later, I moved to Asia full-time to assist project teams responsible for executing USAID-funded projects. That's where I refined the RAP (Rapid Action Planning) process to develop impactful project plans which reflect on-the-ground reality and team dynamics.

I eventually went on to start my own consulting company and shifted my client base to corporations, government agencies, and research institutions. It soon became obvious that the challenges and issues they faced benefitted from using the same system thinking perspective.

Once you understand the inner workings of the LogFrame, you can better understand the interconnection of elements that comprise your project system, and manage it more effectively.

## Systems Thinking: Conceptual Foundation of the Logical Framework

While the LogFrame matrix may initially seem intimidating, the ideas it captures are basic. The four strategic questions offer a user friendly way to learn and apply this tool. These questions are inherently embedded in the matrix and answering them helps you design your project in a way that connects all the dots.

The Logical Framework structure shown on page 45 appears as a 4×4 matrix. Each cell in the matrix organizes project information in a specific way, using standard management terminology. The various cells relate to each other by interlocking principles of good management and common sense. The cells interact—changes in one can affect the others—reflecting the dynamics of our thinking process and the complexity of the issues before us. The completed matrix can

communicate a complicated project clearly and understandably on a couple of sheets of paper.

At first glance, the LogFrame looks like a bunch of connected boxes. But a closer examination reveals multiple types of thinking woven into the matrix logic. In this next section, you will see how the LogFrame invites, accommodates, and incorporates other best practice management disciplines.

## **Integrating Theory and Best Practice**

The *Systems Thinking* perspective built into the LogFrame architecture recognizes that every project is part of a larger system, and we must understand how that larger system affects our effort. System thinking prevents the “elephant parts” problem.

*Strategic Planning* teaches us to begin with the end Objectives in mind, scan the environment, and systematically work backwards to develop our strategy.

*Management by Objectives* (as well as *Management by Results*) reminds us that Objectives exist at multiple levels and that they all need clear Measures of success to make them meaningful. The LogFrame requires separate success Measures for Goal, Purpose, and Outcomes, along with means of Verification.

*The Scientific Method* allows us to formulate any project as a series of linked If-Then hypotheses. Thus, every project can be considered to be a structured experiment, where implementation tests the validity of our educated guess hypotheses. (See the Implementation Equation™ on page 55).

*Total Quality Management* offers more specific tools for measuring Objectives and specifying the degree of quality required. This concept shows up in multiple cells.

*Project Management* provides the necessary body of knowledge to convert Inputs into Outcomes. The LogFrame puts project management tools in their proper place, to support Purpose and Goal Objectives.

Finally, *Team Building* occurs as a by-product when people use these tools together. It’s remarkable how much real work gets done when people gather around a wall-sized grid or use collaborative LogFrame software to flesh out a design they all contribute to and mutually own.

Virtually any valid business methodology can be smoothly incorporated in the LogFrame structure. For example, the data for Return on Investment (ROI) analysis comes from estimating the economic value of the Purpose and Goal level achievement. Figure 3.1 shows the LogFrame matrix, and Figure 3.2 gives definitions of terms used in the LogFrame.

For small- and medium-sized projects, this may be the only planning tool you'll need. For projects of any size, this tool is the ideal starting point to help your team get going quickly and confidently as well as to build an iterative planning and implementation mindset.

## Tackling the Four Critical Strategic Questions

The LogFrame captures, in various cells, the answers to the Four Critical Strategic Questions:

### **1. What Are We Trying To Accomplish And Why? (Objectives)**

The first column describes Objectives and the If-Then logic linking them together. The LogFrame makes important distinctions among various “levels” of Objectives: Strategic intention (Goal), project impact (Purpose), project deliverables (Outcomes), and the key action steps (Inputs).

### **2. How Will We Measure Success? (Measures and Verifications)**

The second column identifies the Measures of success for Objectives at each level. Here we select appropriate Measures and choose quantity, quality, and time indicators to clarify what each Objective means.

The third column summarizes how we will verify the status of the Measures at each level. Think of the Verification column as the project's management information and feedback system.

<b>Objectives</b>	<b>Success Measures</b>	<b>Verification</b>	<b>Assumptions</b>
<b>Goal</b>			
<b>Purpose</b>			
<b>Outcomes</b>			
<b>Inputs</b>			

**FIGURE 3.1** The LogFrame Matrix

<b>Objectives</b>	<b>Success Measures</b>	<b>Verification</b>	<b>Assumptions</b>
<b>Goal:</b> ▶ Big Picture Objective to which Project Purpose contributes	<b>Goal Measures:</b> Measures of Goal Achievement (quality, quantity, time)	Data sources to monitor and verify Goal	<b>To reach Goal:</b> External conditions needed to reach Goal and beyond
<b>Purpose:</b> ▶ Change expected from producing Outcomes ▶ Motivation for Project	<b>Purpose Measures:</b> Success conditions expected at end of Project (quality, quantity, time)	Data sources to monitor and verify Purpose	<b>To achieve Purpose:</b> External conditions needed to achieve Purpose
<b>Outcomes:</b> ▶ Specific Results expected from Project Team ▶ What good managers can make happen	<b>Outcome Measures:</b> Description of completed Outcomes (quality, quantity, time)	Data sources to monitor and verify Outcomes	<b>To produce Outcomes:</b> External conditions needed to produce Outcomes
<b>Inputs:</b> ▶ Activities and Responsibilities needed to produce Outcomes	<b>Input Measures:</b> Resource Budget and Schedule	Data sources to monitor and verify Inputs	<b>To obtain and manage Inputs:</b> External conditions necessary to obtain and manage Inputs

**FIGURE 3.2** Definitions of Terms Used in the LogFrame

### 3. What Other Conditions Must Exist? (Assumptions)

The fourth column captures Assumptions; those ever-present, but often neglected risk factors outside of the project, on which project success depends. Defining and testing Assumptions lets you spot potential problems and deal with them in advance.

### 4. How Do We Get There? (Inputs)

The bottom row captures the project action plan: Who does what, when, and with what resources. Conventional project management tools like Work Breakdown Structures (WBS) and Gantt chart schedules fit here.

## Grab a Front-Row Workshop Seat

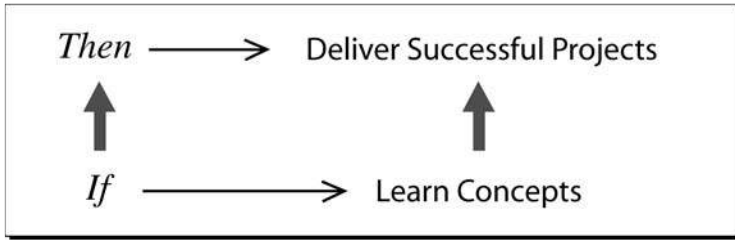
Welcome to my workshop! Can a hands-on strategy workshop itself be considered a project? Absolutely. Workshops include all the elements of any project, including specific Objectives, defined timeframe, limited resources, new cast of players, and uncertainty. Mine have earned a reputation for being innovative because they center around the LogFrame and my “entertraining” style engages everyone as a contributor and participant in the process. As we proceed, you’ll become convinced that the LogFrame is not a form to fill out, but a systematic thinking template that lets you logically design projects by asking, and intelligently answering, the four critical questions.

### 1. What Are We Trying to Accomplish and Why?

As you wrestle with this question, you may have written scopes of work, executive memos, or strategic plans to guide you. At other times, you start from scratch with a blank sheet of paper.

When I toss out this question at the start of my workshop, common responses include “Learn how to manage projects better,” or “Learn how to meet Objectives,” or occasionally, “Keep my boss from meddling.” The common denominator of the various responses is “learning.”

Most of the responses address the *what* part of the question, so I challenge them to answer the *why* part. Then I typically get statements like “Deliver successful projects” or “Improve my projects.” So I diagram this If-Then linkage on a flip-chart pad, as shown in Figure 3.3.



**FIGURE 3.3** If-Then Grid

Does this If-Then logic make sense: If we learn the concepts, then we will deliver successful projects? Sure. This relationship is certainly logical, but the gap between these two Objectives seems too large—like rungs on a ladder that are spaced too far apart for safe climbing. Learning concepts won’t necessarily deliver successful projects. I then ask my audience, “Is something missing? Does something else need to happen between learning and project success? What in-between Objective would make the linkages more logical?”

After some furrowed brows, they slap their foreheads in an *ah-ha* moment and exclaim, “Why, of course. We need to *apply* the concepts!” Exactly!

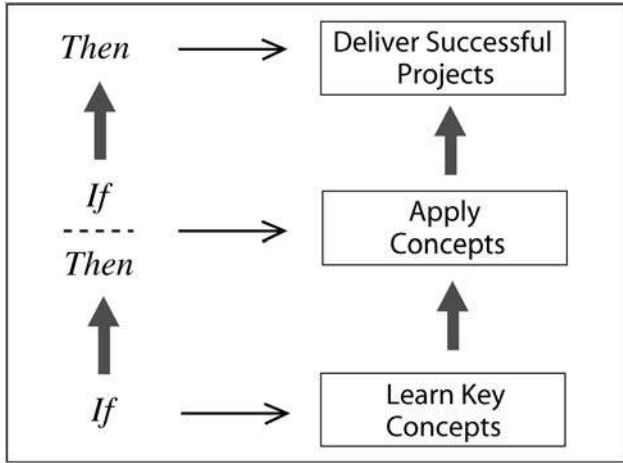
Inserting this intermediate Objective makes the If-Then logic more, well, *logical*. Our hypothesis becomes what is shown in Figure 3.4.

Inserting this intermediate Objective adds realism to our hypotheses and directs attention to the critical, after-workshop Objective that’s necessary for successful projects. *Apply* now becomes the aiming point for designing and delivering a workshop that participants can, and will, put into action.

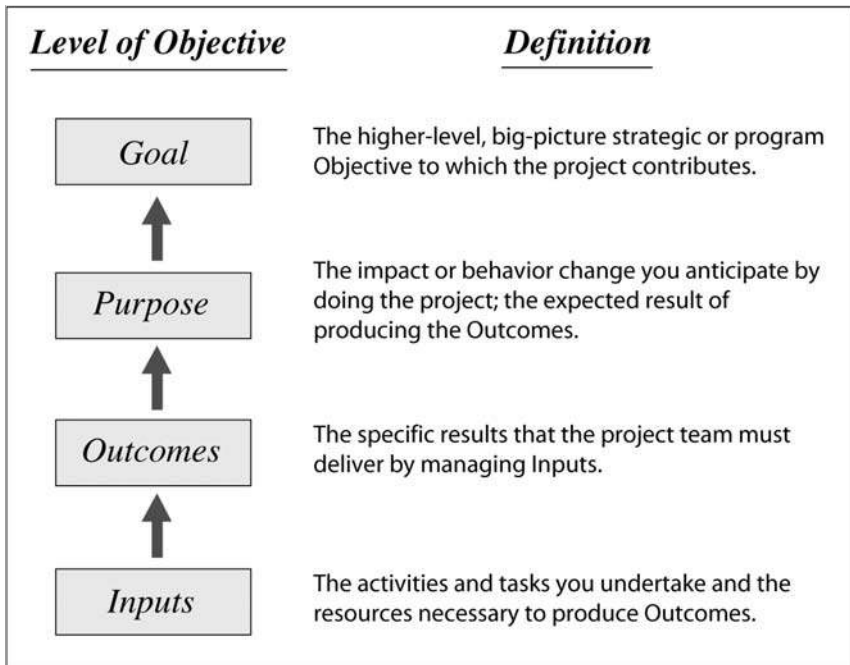
The Objective “Learn key concepts” requires a lower-level Objective describing workshop learning tasks and activities. The phrase “Conduct the workshop” will suffice for now. We’ll break this out into specific tasks and schedule during Question #4.

Remember that every project under the sun is comprised of multiple Objectives. The Logical Framework tool helps distinguish these multiple Objectives, which show up at different levels in the cause-effect chain. The LogFrame organizes them into four separate and distinct levels, each with precise definitions. After applying these definitions, our strategic hypothesis looks as illustrated in Figure 3.5.





**FIGURE 3.4** Logical If-Then Grid



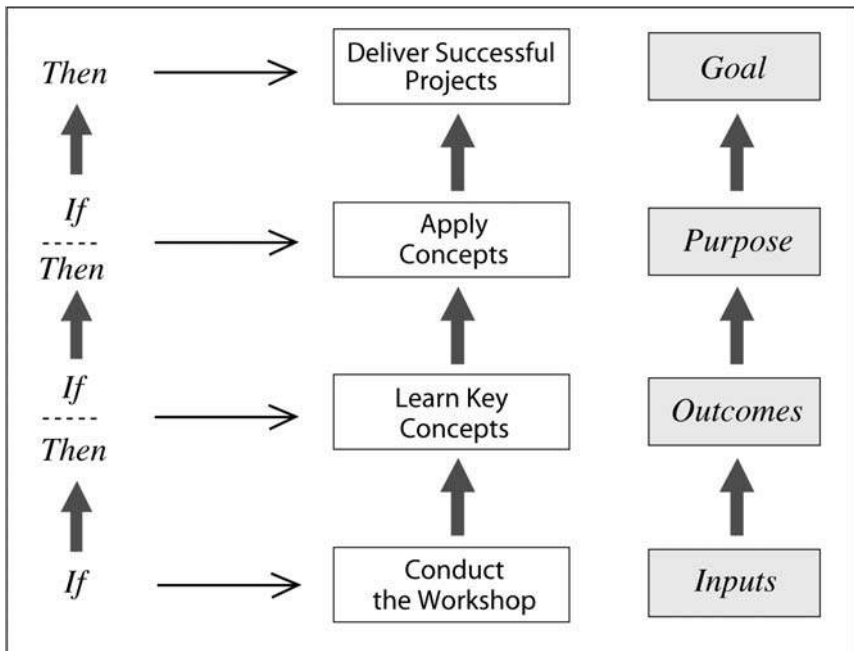
**FIGURE 3.5** Strategic Hypothesis

Reading from bottom-up:

- *If* I conduct the workshop, *then* participants will learn key concepts;
- *If* participants learn key concepts, *then* they will apply them;
- *If* they apply concepts, *then* they'll deliver successful projects.

We've now constructed a first-cut of a four-level strategic hypothesis—the backbone of any project. Note how these “vertical” logical linkages start with Input activities and percolate up to higher-level Goals. You must climb up each rung in the ladder step-by-step, without jumping over any rungs.

Another important distinction is how this strategic hypothesis clearly distinguishes between Outcomes (the learning that happens during the workshop); Purpose (what occurs after the “project”—participants *apply* concepts learned); and Goal (the operational benefit expected from the training—better projects). Strictly speaking, Inputs are not Objectives. Rather, they are the tasks necessary to accomplish Objectives. These definitions are illustrated in Figure 3.6.



**FIGURE 3.6** The Various Levels of Objectives

The value of this kind of thinking for your undertaking should be this evident, which makes it possible to test whether our project hypotheses hang together and connect to business goals. If-Then logic dissolves fuzzy thinking like morning fog evaporating under the stern gaze of the risen sun.

## 2. How Will We Measure Success?

Objectives, by nature, are ambiguous. They become crystal clear only when those involved agree how to measure them.

Each level of the LogFrame invites Success Measures which express how to recognize the successful accomplishment of each Objective. Success Measures consist of sentences, phrases, or bullet points that clarify exactly what each Objective means. These metrics describe, in advance, the conditions that you expect will exist when you declare the Objectives achieved. They should spell out Quality, Quantity, and Time—the three most frequent measurement dimensions:

- *Quantity*—How many/how much?
- *Quality*—How good? What standards or performance specifications?
- *Time*—By when or for how long?

In addition to these “QQT” categories, two other categories may come into play:

- *Customer*—Who are the customers/clients/users/beneficiaries?
- *Cost*—What resources are required?

Think of the LogFrame’s Verification column as a summary of the project’s MIS (Management Information System).

The Verification column defines the formal and informal data sources and methods necessary to track how well Measures have been (or are being) achieved validate the Measures. Typical means of Verification include physical observations, project team meetings, reports, survey results, analyses, tests, and/or whatever else confirms that the Measure has been met.

Let’s add Measures to our workshop example, starting at the Goal and working top-down. As we proceed, notice how the interaction among the LogFrame elements enriches comprehension of how to make the project work.

### *Goal Measures*

I encourage my attendees to define how they will measure the Goal “deliver successful projects.” The usual responses that get mentioned are delivering on-time, within budget, and with quality. Reduction in problems encountered is an additional Success Measure, and all these are easily verified through project schedules and financial records. We then insert Goal Measures and Means of Verification into the LogFrame grid shown on page 53.

### *Purpose Measures*

Purpose level Measures are the most essential of all because they describe the behavioral changes or conditions we aim for by delivering Outcomes. Purpose Measures describe *project success*, while Outcome Measures only describe *project completion*—an important distinction that is often lost.

I ask workshop participants to spell out Success Measures for the Purpose statement “Participants apply concepts after workshop.” Let’s get clear, “How many participants?”; What does “apply” mean?; and define “When?” and “How well?” In small work groups, they come up with possible QQT Measures like these:

- *Quantity?* They decide that at least 80 percent of participants is a reasonable figure.
- *Time?* They agree that within six weeks after the workshop is a reasonable timeframe. They also add a second six-month Measure to track the sustainability of the knowledge application over time.
- *Quality?* Quality, in this case, refers to specific after-workshop behaviors, such as briefing the boss, sharing workshop products, or using the tools on additional projects.

At the same time you define Measures, choose appropriate means of verifying them. If you cannot come up with good verifiers, the Measure needs to be modified.

### *Outcome Measures*

Outcomes are defined as those deliverables your project team commits to make happen. Think of Outcomes as project scope, and Outcome Measures as performance specifications which spell out what the completed deliverables will look like. It’s normally easier to visualize

Outcome Measures than Purpose Measures because Outcomes are usually more tangible. For example, the Outcome “Participants learn concepts” could be measured with, “By the end of the workshop, 90 percent of participants can apply the four strategic questions and define logical If-Then hierarchies.”

Set your Outcome targets with an eye on your desired Purpose and its associated Measures. Target these at the magnitudes needed to achieve the Purpose-level impact you are aiming for. For example, if you only have 20 percent of people apply the concepts, it would not be necessary for 90 percent to learn them. Changes in the Purpose Measures affect the Outcome Measures, which is another example of interconnection between concepts in the LogFrame cell and how changes in one may affect others.

This dynamic and interactive interplay both, horizontally and vertically, promotes the disciplined thinking that creates superior projects. Give this thinking process the attention it deserves. By remembering NASA Rule #15 and using the LogFrame upfront, you’ll avoid logjams down the line.

Now our project LogFrame looks like Figure 3.7 on page 53.

### *Input Measures*

With Outcome Measures in place, Inputs and Input Measures (as discussed later) will begin to fall into place. Keep in mind that multiple outside factors will influence your projects, which is why the third question is also critical.

### **3. What Other Conditions Must Exist?**

No project is a sure bet, even a workshop. Risk factors always exist, whether or not we recognize them. Most teams don’t delve deeply enough into defining and testing their Assumptions at the start to surface the inherent risks. Assumptions are those uncertain factors which are necessary to complete the logical linkages, but which may be beyond the direct control of the project team. While we can ignore Assumptions, we cannot ignore the impact of ignoring these Assumptions.

Workshop participants form small groups again to identify the key Assumptions that link each pair of Objectives. We start by discussing what Assumptions are necessary to go from the Input

<b>Objectives</b>	<b>Success Measures</b>	<b>Verification</b>
<p><b>Goal</b></p> <p>Deliver successful projects.</p>	<p><b>Goal Measures:</b></p> <p>Within next year:</p> <ol style="list-style-type: none"> <li>1. Key project Objectives reached on time, within budget, and at required performance level.</li> <li>2. Fewer problems due to ineffective planning or road blocks that could have been anticipated during planning (e.g., killer Assumptions).</li> </ol>	<ol style="list-style-type: none"> <li>1. Schedule and financial records</li> <li>2. Project logs</li> </ol>
<p><b>Purpose</b></p> <p>Participants apply what they learned following workshop.</p>	<p><b>Purpose Measures:</b></p> <ol style="list-style-type: none"> <li>1. Within six weeks after training, 80% of participants have: <ul style="list-style-type: none"> <li>• completed project designs they began during workshop</li> <li>• shared learning highlights with boss and team</li> <li>• explained selected course concepts to others</li> <li>• prepared a LogFrame for additional projects</li> <li>• scheduled in-house training or Rapid Action Planning (RAP) workshop</li> <li>• adapted selected concepts/tools to enrich their current approach</li> </ul> </li> <li>2. After six months, all participants' project plans have clear Objectives, Measures, Assumptions; all participants are using team process and involving key stakeholders in design.</li> </ol>	<ol style="list-style-type: none"> <li>1. Follow-up evaluation after six weeks</li> <li>2. Evaluation after six months</li> </ol>
<p><b>Outcomes:</b></p> <p>Participants learn key concepts and tools during workshop.</p>	<p><b>Outcome Measures:</b></p> <ol style="list-style-type: none"> <li>1.1 At workshop end, &gt;90% of participants can correctly: <ul style="list-style-type: none"> <li>• identify and apply 4 key questions</li> <li>• identify LogFrame terms, set QQT Measures</li> <li>• construct logical <i>If-Then</i> hierarchies</li> <li>• identify and evaluate Assumptions</li> </ul> </li> <li>1.2 All teams develop an acceptable LogFrame for a case study in class within two hours.</li> <li>1.3 LogFrame adds strategic value to participant thinking; all walk away with expanded capacity.</li> </ol>	<ol style="list-style-type: none"> <li>1.1 In-class exercises, formal tests</li> <li>1.2 LogFrame passes checklist</li> <li>1.3 Ask participants</li> </ol>

**FIGURE 3.7** Partial Workshop LogFrame

activity “Conduct the class” to the Outcome “Apply the concepts.” They typically identify such Assumptions as:

1. Participants are motivated to learn.
2. Instructor is competent to teach.

Further discussion enriches these initial Assumptions to become:

1. Participants want to attend, are motivated, and open to learning.
2. Instructor is effective with this group.

Note this iterative thinking process that applies to all parts of the LogFrame. First-stab answers get you going, but as you proceed, you’ll come up with fine-tune phrasing that more precisely expresses your project intentions.

Examining Assumptions can be intimidating, and in some circles it is discouraged as “negative thinking” or “not our job.” Many otherwise intelligent people are content with only dipping a toe into the Assumptions pool and quickly moving on, rather than diving in and swimming around.

Now let’s identify the Outcome to Purpose Assumptions, those factors necessary to go from learning to post-workshop application.

1. Participants have the opportunity to apply concepts in their jobs.
2. Participants’ bosses and organizational environments support and encourage application of concepts.
3. Participants can remember materials well enough to apply them.

To get from Purpose to Goal, we must assume conditions like:

1. Concepts are relevant—they work in practice and add high value.
2. The organization and its environment are reasonably stable.

### *Assumptions Complete the Hypothesis*

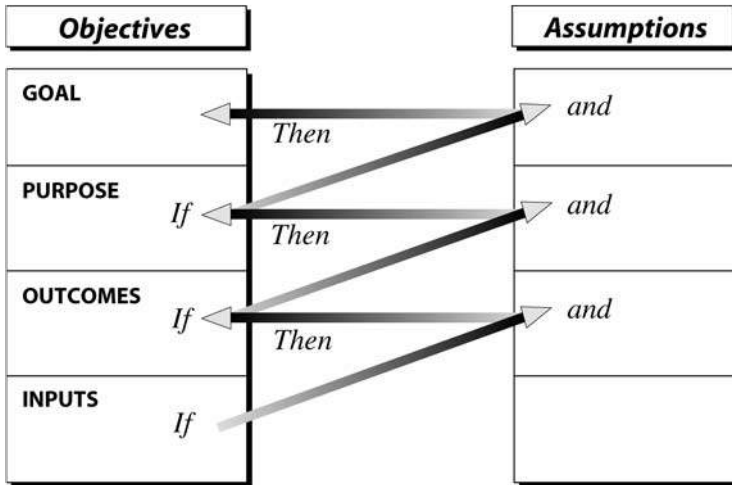
Since Assumptions shine a bright light on possible pitfalls in our climb up the hierarchy, the benefit of spotting them early should be immediately apparent. Better to catch these potential deal-breakers

upfront and decide how to handle them then rather than pay lip-service and have them sabotage you later.

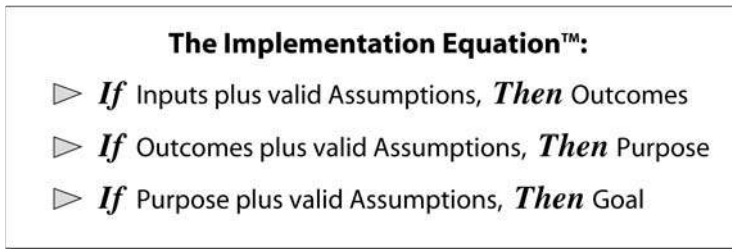
Note that the concept of Assumptions forces us to expand our original hypotheses to reflect uncertainties in our logic chain. The enriched logic becomes “*If / AND / Then*” logic, as diagrammed in Figure 3.8.

*Examine Your Strategic Hypothesis*

This leads us to the core idea that distinguishes exceptional leaders and teams I have known from the rest of the crowd. The very best intuitively grasp and manage what I call *The Implementation Equation™*. This equation adds real-world realism by inviting Assumptions to join our If-Then logic, as shown in Figure 3.9.



**FIGURE 3.8** If / AND / Then Logic Expands the Hypothesis



**FIGURE 3.9** The Implementation Equation™



Every Assumption deserves up-close inspection with a skeptical magnifying glass. Simply stating an Assumption does not make it true. We must ask the following of each one:

- Is this Assumption reasonable? What are the odds it is valid? How do we know?
- What are the consequences for the project if it's not valid? How severe is the impact?
- How can we influence the Assumption in our favor?

Chapter 8 explores how Assumption analysis reveals risks and highlights potential problems. Addressed early enough, we can modify our game plan to head off trouble looming down the road.

#### **4. How Do We Get There?**

With Objectives, Measures, and Assumptions tacked in place, we can confidently turn to the Input level—the action steps to produce Outcomes. Project Inputs are defined as activities and associated resources (time, people, and money). This level—the land where bar charts dwell—is reasonably straightforward and familiar to anyone with project experience. Project management software doesn't help much at the higher levels of Objectives, but it works wonders here.

A clear Input task list, detailing the key steps to produce Outcomes, is the basis for implementation. In our workshop example, the Input list consists of the agenda, whose tasks and schedule are carefully tailored to produce the identified target Outcome. Resources include the people in the room, along with training materials (i.e., workbooks, markers, PowerPoint, and of course, coffee).

Figure 3.10 shows a complete LogFrame for the workshop.

## Ingredients of the Grid

Let's complete this whirlwind tour by looking at all the Logical Framework elements together. If you didn't grasp all the key points and nuances, don't worry. The next four chapters will drill deeper into these four questions and associated planning steps. By the end of the book, you'll have seen enough examples to put the concepts to work for you.

<b>Objectives</b>	<b>Success Measures</b>	<b>Verification</b>	<b>Assumptions</b>
<p><b>Goal:</b> Deliver project successfully.</p>	<p><b>Goal Measures:</b> Within next year: 1. Key project objectives reached on time, within budget, and at required performance level. 2. Fewer problems due to ineffective planning or road blocks that could have been anticipated during planning (e.g., killer Assumptions).</p>	<p>1. Schedule and financial records 2. Project logs</p>	<p><b>To achieve Goal:</b> 1. Concepts are relevant; they work in practice and add high value. 2. Organization and its environment are reasonably stable.</p>
<p><b>Purpose:</b> Participants apply what they learned following workshop.</p>	<p><b>Purpose Measures:</b> 1. Within six weeks after training, 60% of participants have: • completed project designs they began during workshop • shared learning highlights with boss and team • explained selected course concepts to others • prepared a LogFrame for additional projects • scheduled in-house training or project launch workshop • adapted selected concepts/tools to enrich their current approach 2. After six months, all participants' roles in project have clear Objectives, Measures, Assumptions; all key stakeholders involved and all participants are using team process.</p>	<p>1. Follow-up survey 2. Evaluation</p>	<p><b>To achieve Purpose:</b> 1. Participants have opportunity to apply concepts (nature of job is suitable). 2. Participants' boss and organization's environment support and encourage application of concepts. 3. Participants can remember materials enough to apply them.</p>
<p><b>Outcomes:</b> Participants learn key concepts and tools during workshop.</p>	<p><b>Outcome Measures:</b> 1.1 At workshop end, &gt;90% of participants can correctly: • identify and apply 4 key questions • identify LogFrame terms, set QQT measures • construct logical <i>If-Then</i> hierarchies • identify and evaluate Assumptions 1.2 All teams develop an acceptable LogFrame for a case study in class within two hours. 1.3 LogFrame adds strategic value to participant thinking; all walk away with expanded capacity.</p>	<p>1.1 In-class exercises, formal tests 1.2 LogFrame quality checklist 1.3 Ask participants</p>	<p><b>To produce Outcomes:</b> 1. Participants want to attend, are motivated and open to learning. 2. Needs of group can be met within course design. 3. Amount of time is adequate to cover topics. 4. Instructor is effective with this group.</p>
<p><b>Inputs:</b> <b>Activities</b> 1.1 Establish objectives 1.2 Discuss core concepts 1.3 Fundamental questions 1.4 Preview of the Logical Framework 1.5 Vertical thinking—objectives and hypotheses 1.6 Horizontal thinking—measures and verifications 1.7 Identifying and reducing risk and assumptions 1.8 Apply to participant cases</p>	<p><b>Schedule:</b> <b>Day One</b> 8:30-9:30 a.m. 9:30-10:00 a.m. 10:00-10:45 a.m. 10:45-11:50 p.m. 1:00-2:00 p.m. 2:00-2:50 p.m. 3:00-4:00 p.m. 4:00-5:00 p.m.</p>	<p><b>To Obtain and Manage Inputs:</b> 1. Workshop facilities adequate to support learning Objectives. 2. Participants and instructor arrive on time, remain present and undistracted during scheduled time.</p>	

**FIGURE 3.10** Strategic Project Management Workshop Design

Note how cells in the grid shown in Figure 3.11 integrate the project elements into a system through three types of directional logic:

Objectives	Success Measures	Verification	Assumptions
Goal			and
Purpose	If	Then	and
Outcomes	If	Then	and
Inputs	If		

**FIGURE 3.11** LogFrame Incorporates Multiple Types of Logic

1. *Vertical Logic* connects Objectives using If-Then thinking—so that our approach hangs together.
2. *Horizontal Logic* fleshes out Objectives at each level using Measures and Verifications—so we know how we are progressing.
3. *Zig-Zag Logic* pulls in Assumptions as we ratchet up the strategic hierarchy, using our now familiar If-Then thinking—so we can eliminate problems in advance.

**Answering the Interrogatives**

Take note of how the structure of the matrix elegantly incorporates answers to the standard “interrogative questions” like *who*, *what*, and *why*. Goal is the big picture program *why*, or the rationale for this and related projects supporting the broader strategy. Purpose is the project-specific *why*, or the reason for this particular effort. Outcomes are the *what* that we must produce. Inputs capture the *how*, *who* and *when*. (Figure 3.12 shows an Interrogative Chart.)

The interrogative concepts can help structure productive collaborative conversations between executive and project level staff, as this story shows. “Sheila” worked for a large, bureaucratic organization

<b>Objectives</b>	<b>Success Measures</b>	<b>Verification</b>	<b>Assumptions</b>
<b>Goal</b> Why?			
<b>Purpose</b> Why?			
<b>Outcomes</b> What?			
<b>Inputs</b> How? Who?	<b>When?</b>		

**FIGURE 3.12** LogFrame Answers Interrogative Questions

and had an impressive background in corporate security. A month after attending one of my public seminars at UCLA’s Technical Management Program, she called with the exciting news that she had been asked to head up a major corporate initiative to develop a security lessons-learned database for all employees. This project matched the sweet spot of her skill set. Sheila asked me to help her core team start smart by developing a LogFrame for this high visibility project. We scheduled a meeting.

But the week before, an angry Sheila called and read me a memo from headquarters essentially dictating the terms of her project. The memo specified that she would have a staff of two people, would finish within six months, and would deliver three interim milestones by specified dates.

She was justifiably upset at being micro-managed in an area where she was the expert. The notion that upper management could correctly identify what this project would require, without doing serious planning of the type advocated in this book, smacked of arrogance or ignorance as well as demoralized the implementers.

A suggestion to executives who define projects needs and then assign them to project teams: Communicate with project personnel so everyone understands and agrees upon the *whys* (Purpose and Goal).

Agree in general terms about the approach—the *what* (Outcomes)—then let the team figure out the *how*, *who*, and *when* (Inputs) as well as firm up the specific *what* it will take to deliver Purpose and Goal.

I never heard back about how Sheila's project went, but I can predict that it fell way short of what it could have been had there been productive dialogue between those who originated the idea and those who would make it happen.

### **A Rainbow of Applications**

You now have previewed a potent planning process for designing projects of all types and sizes. Here are some work-related examples of projects that benefit from this approach:

- Preparing a strategic or operational plan for a company, division, or team
- Reorganizing a team and sharpening responsibilities
- Deciding how to implement new systems
- Evaluating and redirecting an ongoing project
- Reengineering a process to improve efficiency
- Conducting a paper study, or feasibility analysis
- Refining a rough concept into a proposal or action plan
- Analyzing a problem and developing a solution approach
- Planning new products and services from concept through delivery
- Organizing research and development
- Implementing initiatives identified through a balanced scorecard

This same thought process applies equally well to non-work and personal projects involving leisure, hobby, fitness, finance, family, and “honey-do’s” around the house. Although the possibilities are endless, below are some additional ideas for the LogFrame use:

- Organizing church fund-raising events
- Managing a youth soccer team
- Turning your hobby into an online business
- Sharpening plans for professional development, learning, and career advancement

- Planning for promotion
- Writing and promoting a book
- Organizing a neighborhood Block Watch program
- Putting together a 25-year high school reunion
- Preparing for retirement
- Raising a loving and supportive family
- Completing an advanced degree part-time
- Remodeling your house
- Running for political office.

## Key Points Review

1. The LogFrame tool provides a common framework, syntax, and vocabulary that equips your team to define and test the core strategic hypotheses of any project or plan:

If  $A \rightarrow B$ , if  $B \rightarrow C$ , if  $C \rightarrow D$ ; if  $D \rightarrow$  Bingo!

2. Reduce problems early in the game by scrutinizing the Assumptions that are necessary for your strategic logic to be valid. While you can ignore Assumptions, you cannot ignore the impact of ignoring these Assumptions.
3. The four critical questions offer a simple and jargon-free way to learn and leverage the concepts in the LogFrame grid. These questions are inherently embedded in the LogFrame matrix, and answering those helps you cover all the important issues.
4. The Purpose level Objectives are the most essential because they describe the behavioral changes or conditions we aim for by delivering Outcomes.
5. The cells in the LogFrame grid connect in an integrated fashion using three directional types of logic.
  1. *Vertical Logic* connects Objectives using If-Then thinking.
  2. *Horizontal Logic* fleshes out Objectives at each level using Measures and Verifications.
  3. *Zig-Zag Logic* pulls in Assumptions, adding rigor to the If-Then thinking behind our strategy.

You may impress folks with your technical vocabulary, but if you want to speak the language of project success with your fellow team members, all concerned need to use the same vocabulary and the same logical framework. The four chapters in Part Two of this book will move you forward in learning this new language. As with any other language, to learn it you must use it. At first, you may speak haltingly and make mistakes. But by forming those new sounds, saying those new words, and thinking those new thoughts, they will soon become second-nature; and you'll gain the benefits that come from fluency in Strategic Project Management.