

Being More Agile

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Introduction

Many are seeking a faster alternative to the conventional sequential, or waterfall, project management approach. This has led to an exploration of the agile approach utilized on IT projects as a quicker alternative. The concept, put well by a recent student is agile, as a noun, project management; versus agile, as an adjective, project management. It is more than semantics, and the subject of this paper. When we mean Agile as a method (noun) it will be capitalized. When we mean agile as an adjective, no capitalization will be used. Lastly, when we use italics, these are terms used in the Agile literature.

According to the dictionary, agile means marked by ready ability to move with quick easy grace, and having a quick resourceful and adaptable character. Keep this definition in mind as the description of being more agile.

Why be Agile?

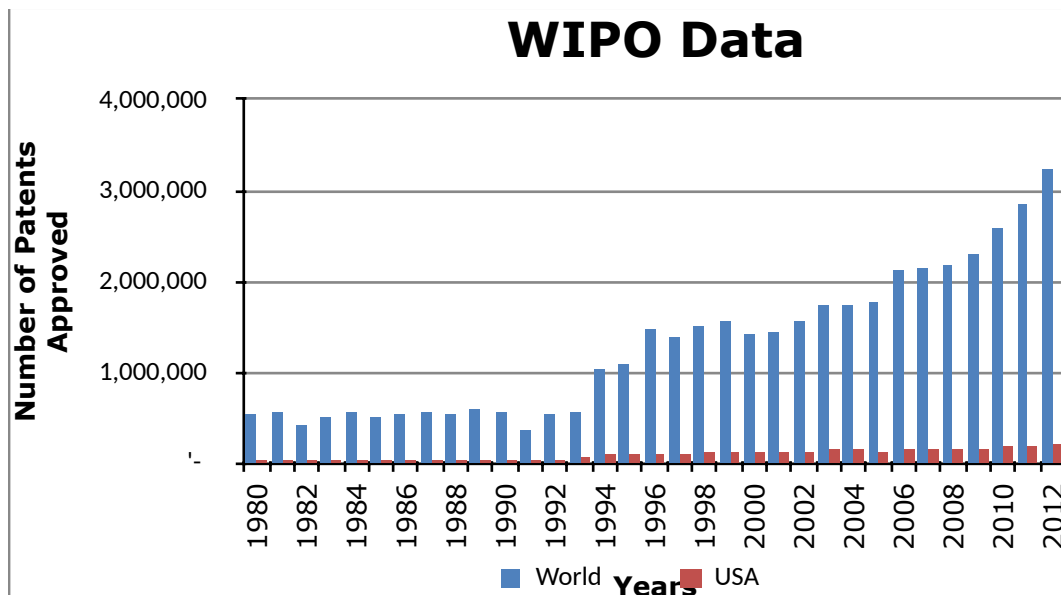
According to Reich and Yong (Reich and Siew Yong 2006): “Across all industries, project success has proved elusive. An early study reported that “in 35,000 projects drawn from all over the world in several different industries, [cost] overruns are the norm, being typically between 40% and 200%” ... A survey of 246 U.S. Army programs showed cost overruns of 21% to 437% ... Two hundred and fifty eight major transportation infrastructure projects showed an average overspend of 28% with 90% projects overspent ... Although IT expenditure accounts for at least one third of capital spending, the success rate of IT projects is about 34%.... This lack of success in attaining project targets across various industries is costly, both in resources and in the loss of business benefits. In this research, we seek to identify theory and practice to increase the success rate.” Many firms are thus striving to find out why project fail, and find measures to remedy the problems, and concurrently discover how to make projects more agile.

There have been thousands of articles in the past few years on the speed of change in the 21st century, and everyone understands that the pace is increasing. Here are a few touch points to illustrate the scope of the increase. First, An INNOVATE study (Foster. R. 2012) found that for the S&P 500 the average life expectancy in 1958 was 60 years, and by 2012 that had dropped to 18 years. And, at the current rate, 75% of the firms will be replaced by 2027.

Next consider one dimension of the speed of change being the number of patents approved each year. Figure 1 shows the number of global patents approved since 1980 for the world and for the USA. Notice that that from 1994-2012 the global approvals increased by 212%. The US contribution is surprisingly low.¹ Imagine the potential increase in the future, projecting the slope of the curve from 2010 to 2012.

Next, consider the amount of traffic on the internet. CISCO (Cisco 2013) provides a yearly projection of internet traffic as part of its Visual Networking Index (VNI). The

¹Figure 2 - WIPO Patents Approved

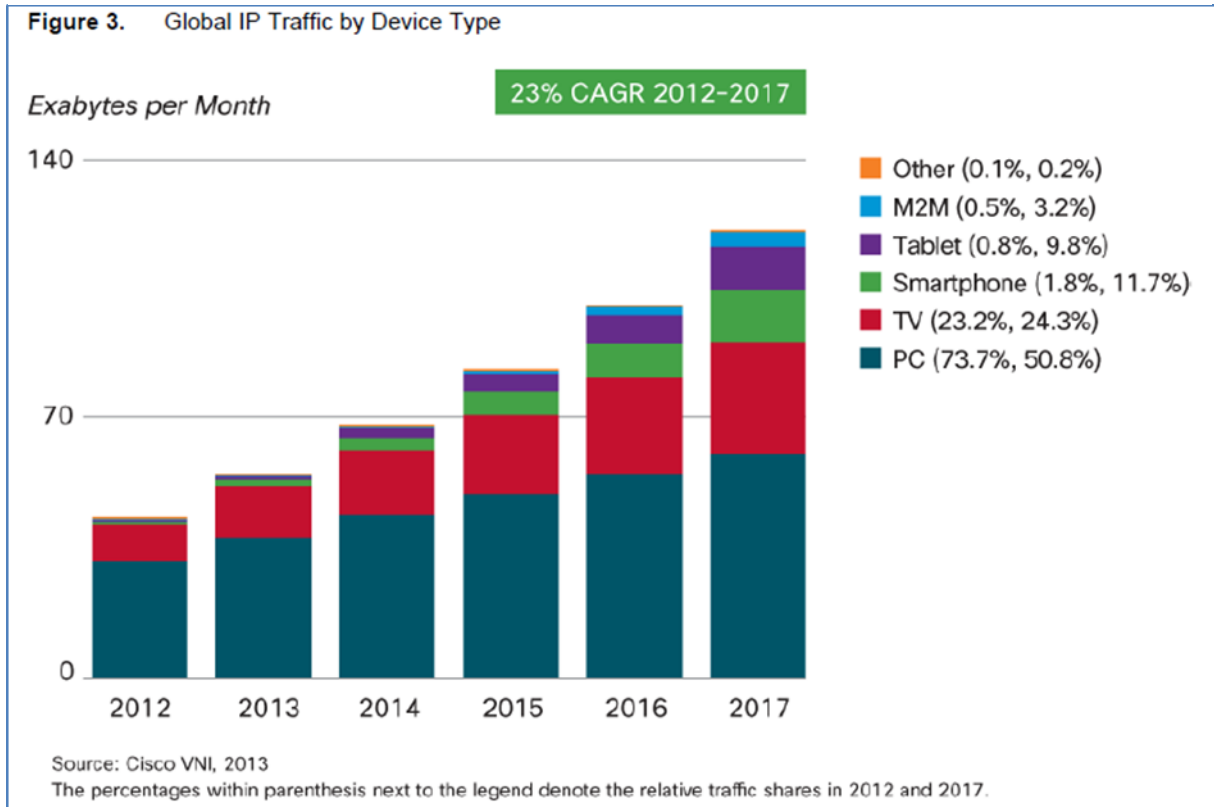


2013 report indicates that annual global IP traffic will pass the zettabyte (1 billion Terabytes) threshold by the end of 2015, and will reach 1.4 zettabytes per year by 2017. Figure 2 on the next page is taken from the CISCO report showing device types. Notice the rapid growth of smartphone usage, which is an indicator of the use of more text messaging - lower emphasis on content, higher emphasis on speed.

As Drucker and others said (Drucker, Nonaka et al. 1998), the 21st century will be driven by a knowledge economy. Drucker said that there are five certainties for the 21st century: aging populations in the developing world, changes in the distribution income, need to redefine performance, global competition, and the divergence of globalization and politics. Certainly all of these certainties are, well, certain. Globalization, and the competition it engenders, is driven by consumers who want high quality products at low prices, and by local markets desiring to participate. People demand a better life, and in many countries, this conflicts with governmental policies that are unable, or unwilling, to adapt to their needs. The current mediator is business, the entity least capable of bridging the gap, and the least willing to do so (Grisham 2009).

Drucker said that organizations should be considering the shape of the future corporation, including people policies, external information, and change agents. He was also clear that income disparity above a ratio of 20-1, management to workers, is morally unacceptable. Marx argued that capitalism will produce internal tensions which will lead to its destruction. He argued that just as capitalism replaced feudalism, so will socialism replace capitalism and lead to a stateless, classless society (Marx and Engles 1968), or a society where radical income disparity is unacceptable. Thus, there are other pressures on firms to adapt to the environments in which they operate. Many argue that global companies have an extended set of obligations that go beyond 20th century notions; self, included. When a company does business in say Nigeria, there are numerous cultural, environmental, and social issues that impact upon its ability to be profitable. Graceful makes a difference.

Figure 2 – CISCO Internet Traffic



The speed of change does not look to diminish over the coming decade. More companies are looking to outsource services, reduce their operating costs, enhance the perception of quality, and of course increase profits. These same companies are finding it increasingly important to anticipate their customer’s needs, and suggest services and improvements before the customer recognizes them. In other words, such firms are looking at themselves as more of an extension of their customer rather than an outside service provider. And, of course, there is the continuing expansion of low cost global service providers who can use the internet to deliver remote services at significant discounts - where the barriers to entry are low. Adaptable.

From personal experience facilitating process improvement sessions for hundreds of companies in scores of countries, firms are striving to drive product roll-outs from six months down to two months, or less. Speed to market is especially critical in some consumer product sectors. Quick and resourceful.

In a recent prologue to a book titled Living Company, de Geus (de Geus 2002) indicated there are four key factors that predict the long-term health and viability of a company:

- Ability to learn and adapt - the knowledge worker. For example, (Sveiby 1998) if one calculates the average value of an employee at Google in 2013 the market places a value of US\$7.2 million for each person. Knowledge can be tacit (understanding) or explicit (information) according to Nonaka (Nonaka, Toyama et al. 2001).

According to a study of the PMBOK (Reich and Siew Yong 2006), Table 1 shows that the PMBOK does not emphasize lessons learned in the processes. Many firms do lessons learned at the end of a project, which may be years. With the

Project-Based Learning	<ul style="list-style-type: none"> • 11 of 44 processes add to Lessons Learned • 8 of 44 processes use Lessons Learned as an input • 1 of the 44 processes has a specific Lessons Learned process as a technique to be deployed
Knowledge Map and Knowledge Inventory	<ul style="list-style-type: none"> • 0 of 44 processes discuss a knowledge map • The knowledge inventory of knowledge of project team member can be inferred
Cognitive Collaboration	<ul style="list-style-type: none"> • 3 of 44 processes refers to the need to have Collaboration

Table 13: Occurrences of knowledge management concepts in the PMBOK® Guide

global economy changing far more rapidly, the information harvested is stale, if it is harvested at all. One benefit of the Agile PM process is that lessons learned are harvested monthly.

- Ability to build a community and a persona for itself. As mentioned above, the creation of a corporate persona or culture. Specifically one that embraces corporate social responsibility in a way that resonates with those in the countries where it operates.
- Ability to build constructive relationships with other entities. Also as noted above, outsourcing is one possible way to drive down costs. The ability of a firm

Table 1 - PMBOK Lessons Learned

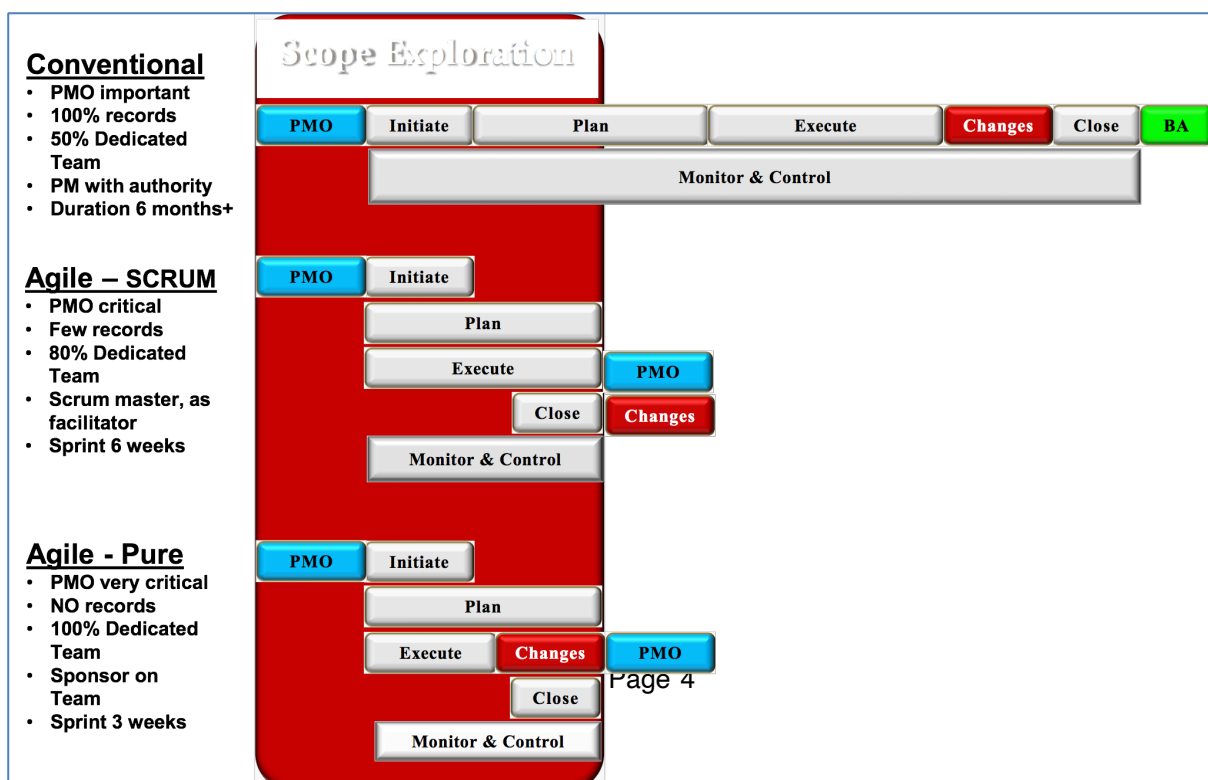
- to make the value chain companies feel they are a part of the firms business and project activities is critical (Grisham 2009).
- Ability to govern its growth and evolution effectively. As discussed briefly above, the role of the firm in the local environments in which it operates. It also includes the ability to learn, and adapt to change gracefully, and often.

Why be agile? So that firms to flourish in a rapidly changing global environment, with grace and speed. Also, for firms to have a culture of change imbued into the DNA of the organization where people think “Won’t it be fun to have things change!”

Now let us look at the range of project management approaches that can be used to address temporary endeavors required for a firm to be successful.

Conventional & Agile Options

To build a consolidated view, consider Figure 3. The conventional, or waterfall, approach as described by the Project management Institute (PMBOK 2013) represents a sequential approach. Initiate the project, plan the work, execute the work, and then close the



project. Notice the blue PMO at the beginning which assumes the company undertaking the work has a Project Management Office (PMO). Notice at the end there is a handover

Figures 3 - Some PM Approaches

to a Business
has such a
three touch

Scope Exploration

innumerable other possibilities and nuances. On the left side of the chart there are some basic heuristics that are suggested, from experience of the author, to help frame the differences between the different approaches.

Analysts (BA), again assuming the company function. For this paper, we have provided points only, but of course there are

Before we do that first look at the Scope Exploration portion of Figure 3. As anyone who has ever attempted to write a scope document knows, it is a formidable challenge, even for a subject matter expert. On all projects scope is discovered after the project is initiated and before the executions begins. It of course continues throughout the project, but in large measure the major components are known during the planning period. As Figure 3 shows, the major scope exploration occurs during the planning period for a conventional project, and throughout for Agile approaches to project management. Also, please note the different ways that changes are envisioned by the different approaches. Now let us look at some of the basic differences between conventional and Agile project management.

PMO. The PMO plays an important role regardless of the approach s/he connect strategy to operations, help appraise the business regularly of the resource requirements, help get changes authorized, and keep an overview of all projects in the portfolio(s). For an Agile approach, the PMO becomes more critical when functioning as a *Product Owner*. Some firms use Business Analysts (BA) in this role, which accomplishes the connection between operations and strategy, but often does not accomplish the other roles that a PMO fulfills. The reason for the criticality is that most firms use *Sprints* that range from two to six weeks. A project that requires six months or more to perform needs someone who can see the entire project, can inform the project team of the overview, and can harvest the lessons learned in a way that benefits the subsequent *Sprints*, and the firm as a whole.

Records. In pure Agile, there are no records kept. The focus is 100% on a functioning product or portion of a product. Of course few firms go to this extent except for such things as life/death business needs like fixing Obamacare, or an outage that eliminates a revenue stream. Most firms take a more measured approach such as *Scrum*. For some firms it is difficult to see the difference between conventional and *Scrum* because the degree of record keeping is essentially the same. Firms that are regulated or must comply with Sarbanes-Oxley have a different set of requirements. Firms that want to be agile must find a balance between no knowledge management (no records), and enough to make the effort worthwhile - a low cost/benefit ratio. Even heavily regulated firms can lighten up on the documentation even on conventional projects. Another reason for the PMO.

Teams. A challenge faced by all firms is finding the right number of employees, especially in a rapidly changing global environment. Enter virtual teams so that human capital can be relocated as business cycles vary from region to region. Some firms like Unilever drastically reduced their layering and increased the responsibility and competence of all employees - the ultimate in down/right sizing. Most are on this path, but at different levels. Again this is a critical role that the PMO can provide, and the higher the level in the firm, the better.

When I ask people around the globe how many projects they work on concurrently, the range is between two and eight. Everyone knows that results in a lack of productivity as people have to regain the mental mode they were in the last time they focused on the project, and they must tune out the project they just came from and are headed to. They must also weigh in the priorities of the various project managers, *Scrum Masters*, *Product Owners*, Sponsors, BA's, and their functional managers. In other words, they are given the responsibility to set their priorities as they understand them. Of course this is both a blessing and a curse for a firm.

To get a simple measure of the productivity loss, try this exercise. Turn on a stop watch, and then write the numbers 1-3 on the front of a piece of paper, then flip it over and write A-C on the back. Repeat this sequence until you have completed the alphabet and then measure your time. Now measure your time if you write all of the numbers then flip the sheet and write the entire alphabet. Normally the loss is about 50%.

As shown in Figure 3, my heuristic (50% dedication) is that one can tolerate a higher level of non-dedication on a conventional project than on an Agile project. The reason is that most conventional projects are long enough to allow a good deal of adjustment and compensation. If one misses a critical day on a 12 month project, it can be overcome. Not so easily on a two week project, obviously.

PMI (PMBOK 2013) looks at project management from a process perspective, doing one thing at a time - initiate, plan, execute, close. Frequently, the process groups are overlapped to some extent in practice, and on so called fast track projects, significantly. That idea is very similar to the Agile approach. Anyone who has run an Agile project, or a fast track project, knows the added importance of dedicated teams. Thus, the Pure Agile heuristic of 100% dedicated teams in Figure 3 and of a somewhat dedicated team for the *Scrum*.

Some recent studies have found some interesting ways of looking at the effects of planning. Dalton (Dalton and Spiller 2012) indicates that past research suggests that difficult goals do not necessarily weaken commitment, but commitment is weakened by the particular conditions associated with executing multiple goals in a finite amount of time, or commitment falters when people perceive conflict between goals or when the expected likelihood of goal success is low. What Dalton says is "our argument suggests that an ironic effect of implemental planning is its potential to undermine the very commitment that prompts people to plan in the first place."

In another study, Townsend and Liu (Townsend and Liu 2012) found "We show that whereas planning of concrete implementations may aid self-control when the person is close to a goal, when the person is far from a goal, such planning might ironically backfire and lead to less self-control than in the absence of making a plan." For examining, think about planning your morning over breakfast. Probably like most the accuracy and clarity of the goals you set would be reasonably high - let's say 90%. On your way to work you consider what needs to be done a week from now. Then at work you must work on the tactics for the next quarter, and at the end of the day there is a meeting to discuss the strategy for next year. If you are like most the yearly strategy is probably 40% accurate at best and the quarterly somewhere in the middle. The researchers found that the closer and more clear the goals, the better the performance. Intuitively we all know this.

Now, one other brief observation before closing this section. People in the US tell me they work on average 50 to 70 hours per week. Internationally the number falls to 35 to 60. Manufacturing literature for the past 30 years shows that when people who work with their hands work extended shifts beyond 50 hours per week, their productivity falls to about 40% to 50%. Clearly, people who work with their heads are more prone to burn

out more quickly. Recent research shows that people cannot multitask effectively; they need to do one thing at a time. Aside from the effects on productivity, there is also the detriment to creativity. Einstein said “creativity is the residue of time wasted.” What he meant was that those epiphanies we all have require down time. 40% of Google’s new product ideas come from the day they do not work, but rather play.

Decision Making. As many have said, Project Managers are known for having little authority, but a lot of responsibility (Kerzner 2006). That of course varies greatly depending upon the person, the firm, and the project. Thus a Sponsor or PMO (PMBOK terms) or a *Product Owner* (Agile term), or a BA (BABOK term) will be needed to help with resource issues, differences in priorities, approval of changes, help with management, and occasionally, a shoulder to cry upon. On conventional projects, sponsors are normally consulted monthly unless a major crisis arises, or the project is on management’s screen. The availability of the Sponsor will depend upon the amount of time a Project Manager must wait for help or a decision.

On Pure Agile projects the Sponsor, or customer, or BA, or *Product Owner* is physically in the same room as the team for the duration of the *Sprint*. For Scrum, the *Product Owner* is readily available even if not in the daily meetings. For most firms, this is very difficult for an executive to do, unless the project is life/death. Pure Agile works because, as shown in Figure 3, changes require no documentation or formal evaluation of scope, cost, time, or risk. The team simply turns to the Product Owner tells s/he what will happen and the effort, and a decision to change is made on the spot.

For *Scrum* projects, some firms will undertake changes as they occur, and either reduces the scope of the remaining work, or extend the *Sprint*. Some firms prefer to put any and all changes on a *Sprint backlog* list and postpone it until later. Still other firms enable the team and the *Scrum Master* to decide what is best make a recommendation to the *Product Owner*, and then proceeds after receiving instructions. Unlike conventional project management where a change control process is utilized with each change analyzed for its impact on the knowledge areas.

One other consideration is the way the teams are structured. In conventional project management, a Project Manager is responsible for guiding the team, communicating with management, resolving disputes, making decisions, enhancing the abilities of team members, and more. In Pure Agile everyone is equal, no named representative - self organized teams. In *Scrum* there is a *Scrum Master*. In many organizations the *Scrum Master* is 60% like a Project Manager, because the firm knows the PMBOK approach, and likes for there to be a responsible party on each team. But, in other firms they follow the Agile literature more closely and utilize the *Scrum Master* as an integral member of the team, who is only responsible to see that the Agile process is followed. Still other firms have a quasi-*Scrum Master* who is not on the teams, but rather oversees multiple *Scrum* teams on multiple *Sprints*.

It is the opinion of the author that strong cross-cultural leadership skills are necessary for any global firm, and critical for agile (adjective) firms. My definition of leadership is the “ability to inspire the desire to follow, and to inspire achievement beyond expectations” (Grisham 2009). On Agile projects, teams are self-organizing and self-directed to some extent depending upon the firm. That means that a person may be leading one day and following the next - their ego must not be an impediment. They must be able to resolve their differences amicably without the help of others, they must be exceptionally well informed about markets, customers, politics, regulation, and more - something of a sugar free BA.

Suggestions

There are indeed a plethora of considerations, a few of which we have touched upon above. Based on 38+ years of experience in 61 countries, and 13 years of research and training work with hundreds of companies, here are some suggestions on how to start thinking about becoming more agile (the adjective):

- **Management Support.** I think it goes without saying, but having the support of level 1 (CEO) management is fundamental, especially if you want better than even chances of success in becoming more agile.
- **PMO.** If you don't have a PMO create one, and make it as far up in the firm's power structure as is possible. Run all projects through the PMO whether done using conventional, Agile, spiral, or any other approach. Connect the BA efforts directly with the PMO, as much as possible.
- **Language.** Create your own language to describe the approaches, processes, and roles. When is a sponsor a sponsor, and when is s/he a Product Owner, or a customer? What is meant by approach, being more agile in the way conventional projects are managed, or adopting Agile project management approaches? It may be better to keep the PMBOK terminology if that is the DNA of the firm, and redefine terms for Agile projects.
- **Records.** Does a firm stop scheduling, estimating, doing change control, risk management, quality assurance and control, etc. Clearly not, nor can most firms dispense with documentation. In fact if a firm does, how would they harvest knowledge, and improve. However, given the recent research, I believe there is room for a rebalancing. I recently was asked to provide SME scheduling services to a contractor with a US\$150 million project and duration of 18 months. Their schedule had 4,500 activities, some with durations of 1 day. Clearly too much detail to monitor efficiently. On many projects huge amounts of effort are spent on attempting to drive perfection, not accuracy, into projects.
- **Budgets & Schedules.** In Agile project management budgets are not important because each *Sprint* is time boxed. I recently was asked to provide SME scheduling services to a contractor with a US\$150 million project and duration of 18 months. Their schedule had 4,500 activities, some with durations of 1 day. Clearly too much detail to monitor efficiently. On many projects, huge amounts of effort are spent on attempting to drive perfection, not accuracy.

On a US\$400 million project with four year duration in Thailand, we spent 4 weeks planning, or about 2% of the project time. On Agile projects with *Sprints* of 4 weeks, the norm is to spend four hours planning before the *Sprint*, or about 2% of the *Sprint*. Agile is not a way to avoid planning, in fact it is more important on short *Sprints* as we have suggested. The big difference is the time spent monitoring and controlling on conventional projects. One of the least well done aspects of project management is assessing physical progress. I can attest to this from my role as an arbitrator. This is not necessary on Agile projects due to the short duration. The schedule activities are normally one or two days in length and their status is determined daily on a visual *Big Board*.

There is also a great deal of time spent on estimating conventional projects, keeping the data current, and then explaining the variances. On Agile projects,

this is not necessary. The *Sprint* is short, and fixed, so the number of person hours to be spent is known in advance. As the team develops the *Story Cards* they build in their availability, and the risk of the difficulty of the task into the estimate. If it takes longer, the *Sprint* must either be extended, or the product scope decreased. The usefulness of the Agile methodology is that there is no need to spend so much time on measuring, re-estimating, and explaining.

A suggestion on a starting point is to dial back the pursuit of perfection. One way is to use activity durations that are a little less than the reporting period frequency, and think of a rolling wave of accuracy. Next week's accuracy is better than next months, is better than next years.

- **Change & Lessons Learned.** To inculcate ready acceptance change into a firm requires strong and fearless leadership (Grisham 2009). To get the behavior one desires, one must demonstrate it. It is necessary to encourage failure, not willy-nilly failure, but striving to achieve more than a person believes they can achieve; that is where the fearlessness come in. I am convinced such an environment most come from the top. This will create leadership to flourish at the bottom.

Lessons learned are simply critical. They need to flow from the strategy down to the operational level, and back again. They must be as fast as or faster than the speed of global business. In my opinion this is less than 30 days. It must not just be explicit information, but more importantly tacit knowledge. Tacit knowledge is the understanding of the meaning and importance of explicit information. To achieve understanding requires time, not possible if people are working 60-70 hours/week.

In conclusion, there are ways to utilize conventional project management and Agile methodology to improve the overall agility of a firm. It must begin by a commitment from the top.

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Implementation intentions are specific plans regarding how, when, and where to pursue a goal (Gollwitzer). Forming implementation intentions for a single goal has been shown to facilitate goal achievement, but do such intentions benefit multiple goals? If so, people should form implementation intentions for all their goals, from eating healthily to tidying up. An investigation into this question suggests that the benefits of implemental planning for attaining a single goal do not typically extend to multiple goals. Instead, implemental planning draws attention to the difficulty of executing multiple goals, which undermines

commitment to those goals relative to other desirable activities and thereby undermines goal success. Framing the execution of multiple goals as a manageable endeavor, however, reduces the perceived difficulty of multiple goal pursuit and helps consumers accomplish the various tasks they planned for. This research contributes to literature on goal management, goal specificity, the intention-behavior link, and planning. [ABSTRACT FROM AUTHOR]

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de Geus, A. (2002). Prologue: The Lifespan of a Company: 1-12.

This prologue to the book "The Living Company: Habits for Survival in a Turbulent Business Environment," by Arie de Geus, explores the concept of corporate longevity. The author suggests that companies prematurely fail because the prevailing thinking and language of management are too narrowly based on the prevailing thinking and language of economics. Managers focus on the economic activity of producing goods and services and forget that their organizations' true nature is that of a community of humans. De Geus describes a study he and colleagues at the Royal Dutch/Shell Group, based in Britain and the Netherlands, conducted in 1983. The study revealed four key factors that long-lived companies shared: (1) they were sensitive to their environment; (2) they were cohesive, with a strong sense of identity; (3) they were tolerant; and (4) they were conservative in financing. After sometime, however, de Geus gradually changed his thinking about the real nature of companies and now sees the four characteristics of a successful company in the following manner: (1) Sensitivity to the environment represents a company's ability to learn and adapt; (2) Cohesion and identity are aspects of a company's innate ability to build a community and a persona for itself; (3) Tolerance and decentralization are both symptoms of a company's ability to build constructive relationships with other entities; and (4) Conservative financing is the company's ability to govern its growth and evolution effectively.

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A promising new topic for researchers who focus on project management is the application of knowledge management concepts as a way to improve project success. In this paper, knowledge management theory is used as a lens to examine the Project Management

Institute's A Guide to the Project Management Body of Knowledge (PMBOK® Guide), because this book is globally influential among project managers. Several different theoretical frameworks are used. Results show that the PMBOK® Guide has a strong bias toward explicit and declarative (i.e., 'how') knowledge, and pays less attention to tacit and causal (i.e., 'why') knowledge. Our recommendations outline how the existing structure of the PMBOK® Guide can be preserved while the content is enhanced using knowledge management concepts that have been shown to be influential in enhancing project success. This is an enhanced and expanded version of a paper presented at the PMI Research Conference 2004 in London, England. [ABSTRACT FROM AUTHOR]

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Townsend, C. and W. Liu (2012). "Is Planning Good for You? The Differential Impact of Planning on Self-Regulation." Journal of Consumer Research 39(4): 688-703.

Previous research suggests making plans is generally beneficial for self-control activities such as saving money or dieting. Yet the results of five experiments reveal that planning does not always benefit everyone. Although planning tends to aid subsequent self-control for those who are in good standing with respect to their long-term goal, those who perceive themselves to be in poor goal standing are found to exert less self-control after planning than in the absence of planning. This occurs because considering a concrete plan for goal implementation creates emotional distress for those in poor goal standing, thereby undermining their motivation for self-regulation. Findings of the fifth study suggest that engaging positive self-related thoughts in the relevant domain after planning can prevent any negative consequences of planning on subsequent behavior. [ABSTRACT FROM AUTHOR]

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