APEX-4
Project Expert
Formula™

DELIVER PROJECTS. ENJOY THE JOURNEY

APPLY EXPERIENCE
FOUR SUCCESS FACTORS
SOLID FOUNDATIONS

GREG KRAWCZYK

+ EXPERT COMMUNITY AND
THOUSANDS OF EXPERT INSIGHTS

For the best interactive experience, open this PDF in Adobe Acrobat Reader (free): get.adobe.com/reader

What is APEX-4 Project Expert Formula?

Big Ideas, Goals, Change or Projects can be exciting, career defining, electric. They can benefit you and those that you care about.

But they can also be stressful, derail careers and relationships where they go badly wrong.

Welcome Video

▶ WATCH NOW

✓ APEX-4 Stands for Applied Project Experience.

✓ The formula for success is your project + insights from thousands of experts.

✓ APEX-4 boils these insights into 4 Success Factors.

How It Works

This playbook gives you 12 Steps to apply the four Success Factors, whilst working on the Jobs to deliver a project.

Three Jobs*

1: Set the Direction

2: Prove It Works

3: Make It Happen

Four Success Factors

1: Get the People Right

2: Look Outside

3: Plan for Speed

4: Make Good Decisions

♠ Ignore any Job or Success Factor, and you risk building on a foundation of sand.

*The word "Job" is used instead of the Stage or Phase to focus on the goal you need to reach. Many find "Jobs" language easy to understand. Easy to understand means easy for people to support. To see how APEX-4 maps to other frameworks, refer to the website. Key Point: Use the language that works for you, whether Job, Phase or otherwise.

How To Use This Playbook

APEX-4 helps you put the foundations in place for successful projects.

Apply It To Something Real

This playbook is designed for experiential learning, apply it to a project immediately:

- Pick something that has a bit of uncertainty or complexity. Ideally something still early, where you can shape the ideas.

- Don't let perfection be the enemy of progress. Just start something, anything.

- For example, it could be to deliver a project, a technology release, a big personal idea or a goal for your business.

Identify Your Example

For the best experience, apply the four Success Factors to a real idea, goal, project or big change. Write down the name of your initiative now.

How to Navigate APEX-4

This playbook follows the structure from The Framework Map (see next page).

1. Start by getting your bearings. (next section)

2. Click through the Framework Map to access the area you need.

3. Access further information online.

Would you like to know more? →

Real Examples

Examples where APEX-4 has been used:

✓ An individual had an idea for a new business and used the formula to launch the first product.

✓ An organisation used the formula to improve how they deliver projects.

✓ An organisation used these Success Factors to transform how they provided their products and services.

When To Use?

APEX-4 is best used right from the start. That light bulb moment. Eureka!

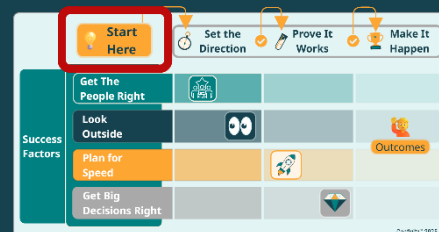It can be applied any time and is also a useful review tool.

Framework Map

Job 1
Set the Direction

Job 2
Prove It Works

Job 3
Make It Happen

APEX-4 Project Expert Formula™

The Framework Map

A click through visual guide.

APEX-4 Project Expert Formula™

Apply Experience. Four **Success Factors**. Solid Foundations.

Start Here

Set the Direction

Prove It Works

Make It Happen

Success Factors

Get The People Right

Look Outside

Plan for Speed

Get Big Decisions Right

Outcomes

Confluity™ 2025 ©

Start Here

Get Your Bearings, work out which Job you're on.

Work Out Which Job You Are On

Use the table below.

Question	If YES	If NO
1. Do you know the outcome or problem you're solving?	Go to Q2	Start with Job 1
2. Have you picked the option* you'll move forward with?	Go to Q3	Stay on Job 1
3. Have you tested the option and built a delivery plan?	Go to Q4	Work on Job 2
4. Have you started delivery [build big / scale up / launch]?	Go to Q5	Work on Job 3
5. Is the project delivered and are the outputs being used?	Celebrate!	Continue Job 3

Jump to the Job

Press any one of these buttons to jump to your Job.

1: Set the Direction →

Shape the design option that looks most promising.

2: Prove It Works →

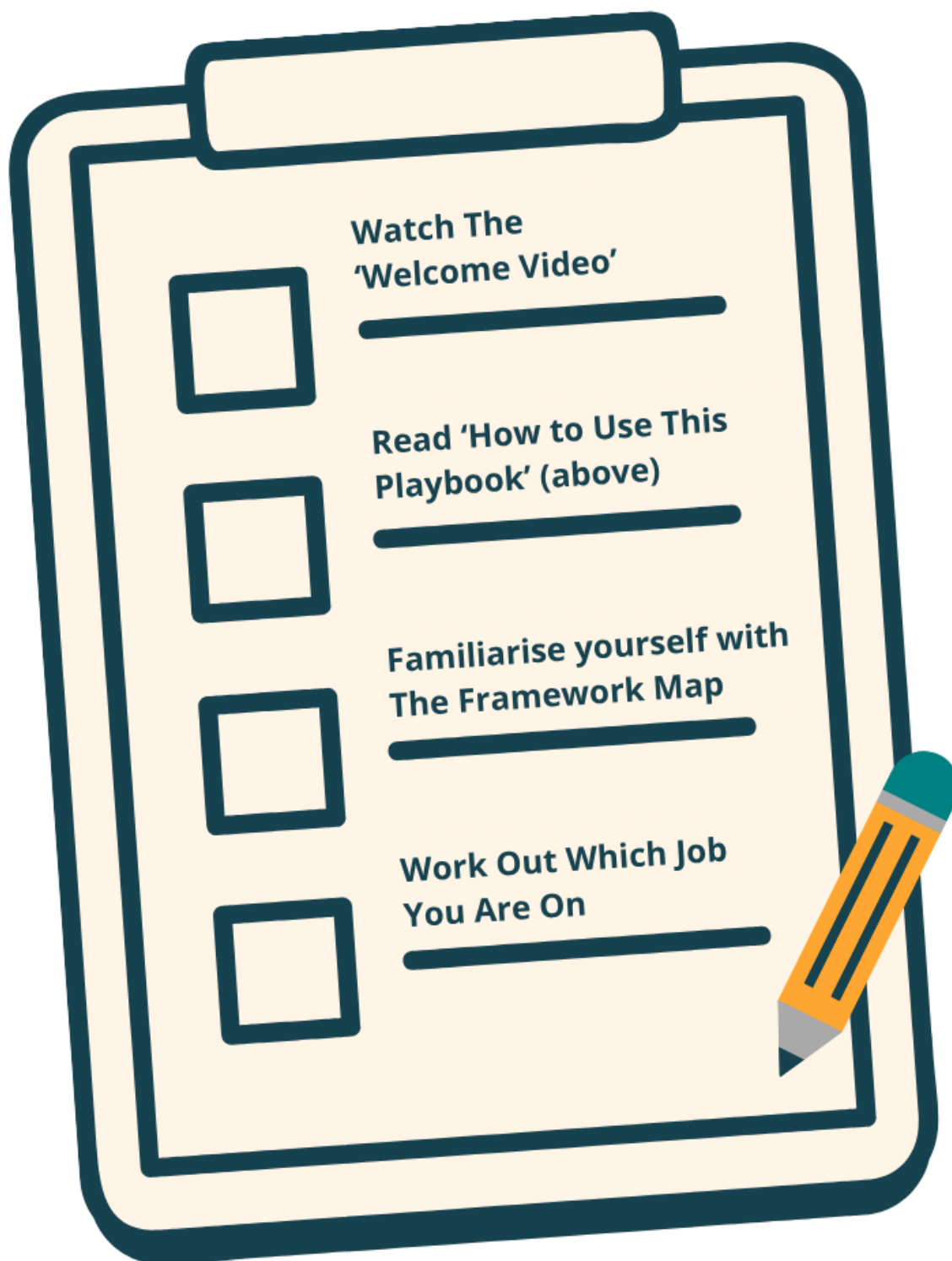Prove the option will deliver the expected outcomes.

3: Make It Happen →

Deliver outcomes. That is, people using your product or services in the way that you expected.

The word "option" refers to the different approaches you could take to achieve your goal, chosen after consulting users, customers and key people who can make or break the project i.e. senior management and finance.

✅ Checks, before you move on.

Watch The 'Welcome Video'

☐

Read 'How to Use This Playbook' (above)

☐

Familiarise yourself with The Framework Map
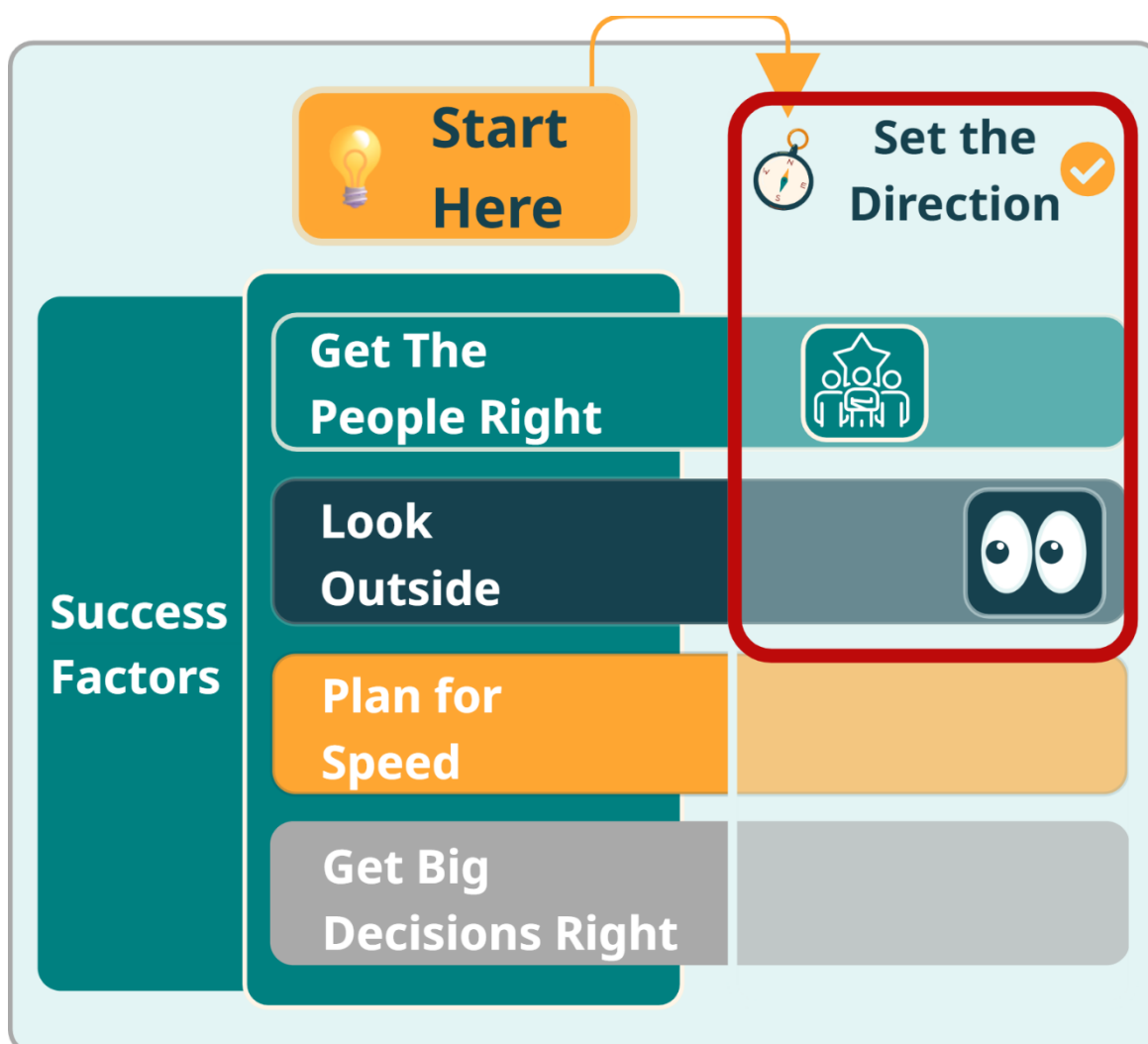
☐

Work Out Which Job You Are On

☐

Job 1:
Set the Direction

Q. Your aim for this Job?

A. Shape the purpose for your initiative into design options and a preferred option that looks most promising. Set both the direction and the pace for what comes next.

Start Here

Set the Direction ✓

Success Factors

Get The People Right

Look Outside

Plan for Speed

Get Big Decisions Right

Introduction

Many experts will tell you: projects don't go wrong, they start wrong.

The aim of this Job is to get the project off to the best possible start. Ensure everyone is clear on what will be delivered, why it matters, how fast it needs to happen, and how the best option will be tested.

Project Brief*

Start this early, write this down to finish this Job:

- What: Define what the project seeks to achieve.
- Why: Explain why this matters.
- When: What does "Proving it Works" look like next.
- How: Which option of your thing will be taken forward to be tested before you [go big / scale up / launch / build-out].

Why: Setting the direction and pace provides the foundation for the project, ensuring it starts the right way, at the right speed, and that the best option is selected to test. Before you go all in.

How: Focus on locking in the first two Success Factors, with these Steps.

Success Factors		Steps	
1. Get The People Right		1. Ask Why	If no-one can say why, then keep asking.
		2. Get A Masterbuilder	Find your Yoda.
		3. Get People on the Bus	Teamwork makes the dream work.
		4. Make Friends	& Keep them Friendly!
2. Look Outside		1. Your Project Is Not Unique	It has been done before. Google Harder!
		2. Look for Tried & Tested	Don't reinvent the wheel…

⚠️ Key Risks

Watch out for these common trips.

- ♠ Individuals exerting influence over decisions to serve their own purpose.
- ♠ People pressuring you to skip Setting the Direction for 'action'.

* The term "brief" is a widely used term for a document that Sets the Direction. Others use the terms charter, canvas, vision statement or outline business case, etc. Choose the phrase that works best for you.

Success Factor 1: Get The People Right

Give a great idea to a bad team and they will mess it up. Give a bad idea to a great team and they will make it work.

Step 1.1
Ask Why

First, ask the simplest question of all:

Why are we doing this?

Why

To put the foundations in place, you're going to need support from the people who control the money and resources.

- This is one of the most important first steps in any project

- It is a step regularly missed or not done well.

- Getting this right ensures your initiative doesn't get ignored or under-resourced, you avoid a major source of stress.

If no-one can say why, then keep asking.

Would you like to know more? →

How

Describe what the project is to deliver, and why this is important to you and those who can make or break the project. For many projects, this includes senior management and finance.

How to Complete The Checklist

1. Click the checklist item that best describes where you are with your initiative.

2. Complete the checklist for the other Steps.

3. Apply the colour rating to the Readiness Assessment at the end of this Job.

4. Optionally, add a few words to explain your reason for the rating.

Do you have a clear purpose statement?

- No clear statement yet
- Partially developed, still needs refining
- Clear, agreed, and documented

Reason for the rating

Step 1.2
Get A Masterbuilder

Access someone who has successfully led a similar path and who can help you avoid the scars.

Why

Project manager stress is at an all-time high, with 50% of project managers currently or previously feeling burnout. Some identify this as higher than any other profession and attribute unrealistic deadlines as the leading cause.

- Find someone who's been there, seen this project, and argued for the right resources and support for your type of project.

- They are going to help you make the case, get the right people, and put the right tools and processes in place.

- They will help you enjoy the journey and avoid becoming another statistic.

Find your Yoda.

Would you like to know more? →

How

Find a guide, someone who has done it before and builds confidence in others. You don't always need them full-time, but you do need their wisdom.

Like the master stone masons of old. They've delivered your outcomes before.

Do you have a Masterbuilder (Experienced) Engaged?

- ☐ Not engaged, no clear person onboard
- ☐ Identified person, not fully onboard yet
- ☐ Masterbuilder fully engaged and advising actively

Reason for the rating

Step 1.3
Get People on the Bus

Everyone needs a support network

Why

43% of project managers feel teams are understaffed, but only 20% of senior leaders agree.

A good team will act as a support network and help make the case for additional resources.

How

Where possible, get a team that has worked with the masterbuilder. In any event, get your team on the same page. Putting in the time to build trust and set clear roles and responsibilities will go a long way.

If your project will require people to change their behaviours, this is generally called business change. Seek support from friendly people who support what you do and can act as change champions.

Do this before Step 4.

Teamwork makes the dream work.

Would you like to know more? →

Do You have A Support Network with Clear Roles?

- ☐ Team not yet identified, roles unclear
- ☐ Team partially identified, some roles still unclear
- ☐ Team fully identified, roles clearly set

Reason for the rating

Step 1.4
Make Friends and Keep them Friendly

Most projects involve changing the way people operate, or their behaviours. Think ahead about the people who could help or hurt your progress.

Why

One in three failed projects lacked strong stakeholder engagement (PMI).

- Projects with active change champions are up to twice as likely to succeed.

- If you want to deliver without constant firefighting and get recognised for the right reasons, getting key influencers on side is one of the fastest ways to boost your chances.

How

Work with your champions to develop strong relationships with at least five staff members, customers, or users. Build those relationships early.

- Transparency, inclusion, and regular conversations go a long way.

- Don't wait for people to complain, build your bridges before you need them. You'll need their support during Step 3.2.

- In Step 3.2, you should test and prove that what you're building will achieve your expected outcomes. This means people using the things you produce.

Keep the vipers out of the nest.

Would you like to know more? →

Stakeholders Engaged and Friendly?

☐ Key people not identified or engaged

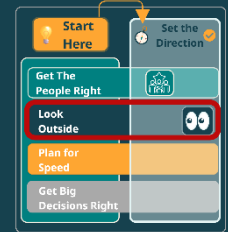☐ Key contacts made, ongoing engagement needed

☐ Key people actively engaged, supportive, and aligned

Reason for the rating

Success Factor 2: Look Outside

Many projects fail by believing they are unique
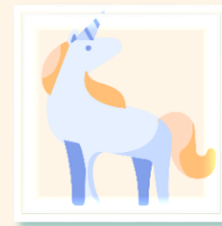
or jumping into solutions too early.

Step 2.1
Recognise Your Project Is Not Unique

Your idea or project may be unique and new to you or your business, but rest assured, someone, somewhere has done something similar before.

Why

If you want more support from senior management, show them how other organisations delivered similar projects and what resources they used.

- People respond better to real examples than stats

- Share stories, and you'll find it easier to secure the backing your project needs.

- These insights will save you time, money, and stress.

How

Identify and learn lessons from those who have achieved similar outcomes or from projects with similar components. What was the actual cost, how long did it take, what surprised them?

Do you think it's never been done before? Google harder!

Would you like to know more? →

Insights from Similar Projects Identified?

- ☐ Not identified or explored

- ☐ Initial exploration, insights still limited

- ☐ Comprehensive insights gathered and documented

Reason for the rating

Step 2.2
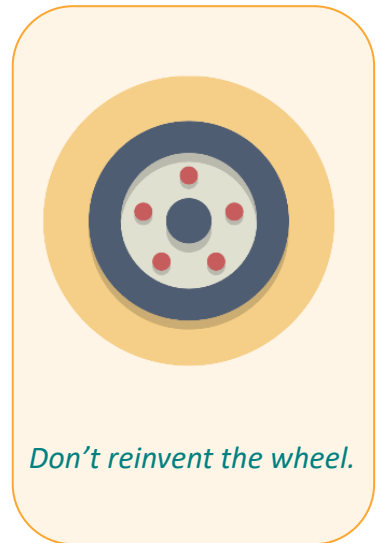### Look for Tried & Tested Options

Explore multiple options before you commit and ask yourself: is there a way to deliver this using something that already works?

Why

Humans are hardwired to commit to one option, resist this impulse. Compare different options to see your preferred choice in a new light.

One of the best things you can do to deliver on time and avoid complaints is to choose an option that others have already tried and tested.

- New, untested approaches often mean more surprises and setbacks.

- The more you must learn as you go, the harder and more expensive your project becomes.

- If you don't consider alternatives, you'll likely commit to your option, thinking it's the best thing since sliced bread. This may end badly. Explore options, see your preferred choice in a new light, and save yourself embarrassment later.

Don't reinvent the wheel.

Would you like to know more? →

How

Identify different solutions to achieve your goal.

- When comparing options, look for modularity, speed, and the ability to test and learn.

- Focus on using tried and tested techniques, technology, materials or methods.

- Stand on the shoulders of giants and avoid building from scratch or customising.

Multiple Options Explored and Evaluated?

- ☐ No exploration of options yet
- ☐ Partially explored; further analysis needed
- ☐ Proven options explored and evaluated

Reason for the rating

Have you Set the Direction?
Readiness Assessment

Stop, take stock. Complete this readiness assessment before moving onto the next Job.

Here's how it works

1 Check Direction is Set *(i.e. a written Brief).*

2 Complete all Checklists *(See previous pages).*

3 Fix reds, then fix or accept ambers.

Readiness Checklist

Would you like to know more? →

Brief Approved?	Y/N

Success Factor 1 **Get the People Right**	
1.1. Ask Why	
1.2. Get a Masterbuilder	
1.3. Get People on the Bus	
1.4 Make Friends & Keep Friendly	
Overall score (use lowest colour above)	

Success Factor 2 **Look Outside**	
1. Recognise Your Project is Not Unique	
2. Look for Tried & Tested Options	
Overall score (use lowest colour above)	

Job Status: Set the Direction (use lowest colour above)	

Key

Red: Missing, fix before progressing.

Amber: Progress made, gaps to be addressed.

Green: Ready and good to go.

If overall scores do not update, please select them manually. For best results, use Adobe Reader.

Few projects fully achieve their goals.

Do you have a red?

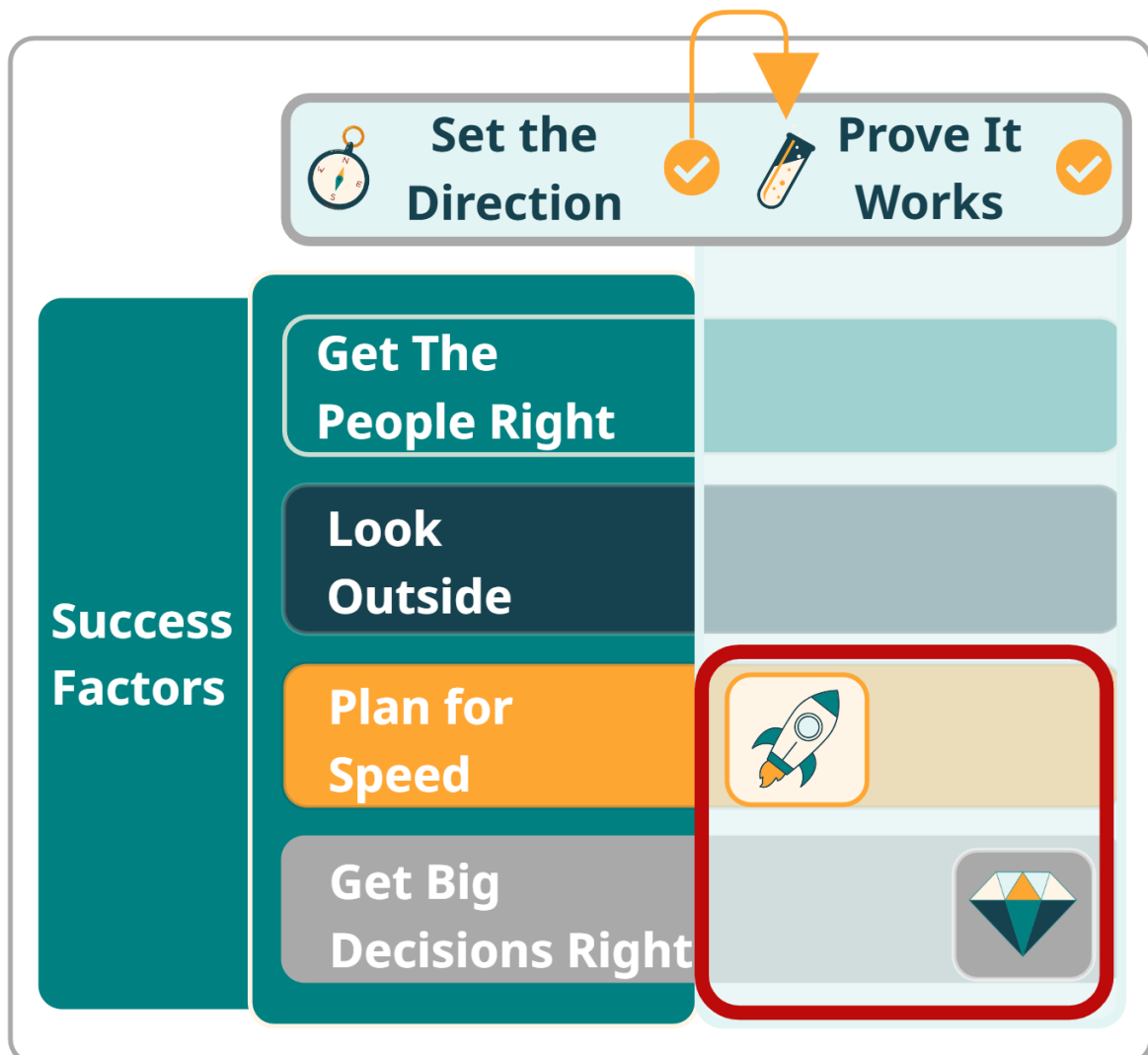Can you afford not to spend a few weeks to turning it to amber?

Is proceeding worth the risk?

Job 2: Prove It Works

Q. Your aim for this Job?

A. Prove your preferred option will deliver the expected outcomes.

(this includes testing with users, customers & those affected)

Set the Direction ✓　　**Prove It Works** ✓

Success Factors

	Set the Direction	Prove It Works
	Get The People Right	
	Look Outside	
	Plan for Speed	🚀
	Get Big Decisions Right	💎

Already have your option selected?

Recommendation: Go back and complete the Readiness Checklist for Success Factor 1, "Get the People Right." Think of this as getting the foundations in place.

Introduction

Many experts will tell you: Start small.

Now that you've explored your options, it's time to shape the one that looks most promising. Build a small version of it if you can.

Delivery Plan*

If you only produce one thing, make it this.

Produce a written document that answers what, why, when, how, where, proving that your thing will achieve your expected outcomes and before you [go big / scale up / launch / build-out].

Why: This will become your record of your thinking and experimentation. It will be your plan to achieve successful outcomes. It will say how you intend to produce your outputs and get people using them.

How: Continue the good work on Success Factors 1 and 2, now is when to get maximum bang for buck from Success Factors 3 and 4.

Success Factors	Steps	
3. Plan for Speed	**1. Think Big, Start Small**	Like Lego, One block at a time.
	2. Learn by Experimenting	Build a simple basic version of your thing.
	3. Keep On Top of Risks	Focus on spotting dangers early.
4. Get Big Decisions Right	**1. Adjust for Optimism**	Projects often over-run, it is not a coincidence.
	2. Be Ready to Adapt	"Everyone has a plan until they get punched in the face"
	3 Be Ready to Step Away	"If you find yourself in a hole, stop digging."

⚠️ Key Risks

Watch out for these common trips.

♠ Pressure to focus on analysis and to provide 'certainty', at the expense of real-world experiential learning.

♠ Staff, users or other stakeholders who fall into the "compliance" category.

They are the 'danger crowd', individuals with a tendency to quietly go along with an idea, only to throw rocks later.

* Choose a term that works for you, others call this the Project Management Plan, or even the "Make It Happen Plan".

Success Factor 3: Plan for Speed

Think slow, act fast. Shorten the window for things to surprise you and cause disaster during the expensive and highly risky job of going big and making it happen.
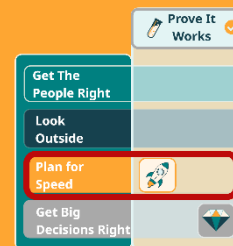
Step 3.1
Think Big, Start Small

Ambition is good, but don't try to do it all at once. Break your solution into small, simpler parts. Something you can complete in sections, like Lego.

Why

Projects overrun on time by about 20% on average.

- Getting it right on the small scale saves embarrassment at the finish line.

- Avoid the scenario where cost estimates keep going up and up.

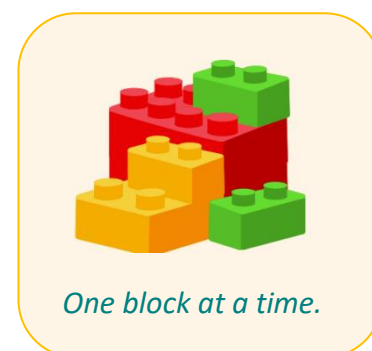- Avoid a 'go live', with issue after issue.

How

Develop the big picture design, break it down into smaller sections/modules.

Start by doing one section at a time, then two at a time, then four etc.

Working in this way means the later sections take less effort. For example.

One block at a time.

Would you like to know more? →

- Business change: Departments could be your module, rolling out the solution one department at a time.

- Construction: Turn the flats into blocks. Complete one, with buyers. Then move on to Block two etc.

- Railway: Make a section of the track your Lego. Finish that with paying customers and running trains, then do the next section.

Clear Modular Approach ("Lego Brick") Defined?

- ☐ Approach not defined

- ☐ Approach partially defined, still needs work

- ☐ Clear modular approach fully defined

Reason for the rating

Step 3.2
Learn by Experimenting

Practice makes perfect. Prove your plan will work.

Why

Experience is the keyword here. You get experience by experimenting. When you reflect on this experience, that gives you wisdom. You then become an expert on your project, you want this wisdom before you scale up or build big.

If you do not give your project the opportunity to learn, you are raising the risk level. Treating projects like experiments is one of the best ways to reduce pressure and stress on a project.

How

Build a simple, basic version of your product or solution quickly. If this isn't possible, create a virtual or simulated version.

- This should be the first version of your module / section (see 2.1)

- Test it in real-world application, not only internally with your team (builders) but also directly with customers or users.

- Early customer or user involvement will ensure your final product is something people genuinely want and will adopt.

"Plans are useless, but planning is essential."

Dwight D. Eisenhower

Would you like to know more? →

Experiential Learning and Reflection Achieved?

- ☐ We haven't tested our ideas

- ☐ Some experiential learning, more needed

- ☐ Full section or module tested, end to end with users or customers.

Reason for the rating

Step 3.3
Keep On Top of Risks

Uncertainty is the only certainty; things will not go to plan.
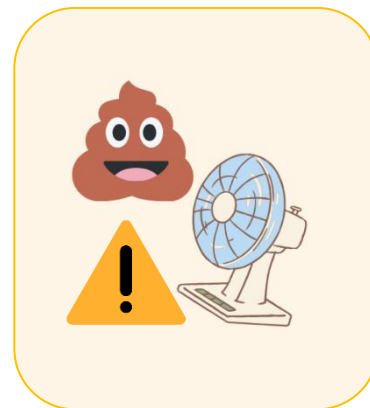
Write down your top risks and do something about them.

Why

44% of project managers say a lack of resources is a top challenge.

Your biggest stressor is likely to be time and getting the support you need from others.

Resourcing aside, a bad risk (threat) can kill your project before you get a chance to explore any opportunity. So, keep on top of them.

How

Make risks visible and continuously identify and mitigate them (at least monthly)

- Make risk conversations regular and honest with those who allocate time and funding.

- Start with threats, focus on spotting dangers early.

- Brainstorm new opportunities to help your project succeed.

Would you like to know more? →

Risks Identified and Mitigation Planned?

☐	No risk identification or mitigation, yet.
☐	Risks partially identified, mitigation plans incomplete.
☐	Risks identified and addressed regularly.

Reason for the rating

Success Factor 4: Get Big Decisions Right

The biggest risk is you. Our natural optimism, and biases like availability bias and in-ability to let go can lead to poor choices.

| Prove It Works |
| Get The People Right |
| Look Outside |
| Plan for Speed |
| Get Big Decisions Right |

Step 4.1.
Adjust for Optimism

Humans are hardwired to be optimistic. Also, most projects take longer and cost a lot more than first predicted. It is not a coincidence.

Why

If you tell the people that matter, especially directors, that you have reviewed previous projects for overruns and adjusted your estimates, you will look like you have the answers.

Use this data and newfound respect to make your case for the time, money and support that you need.

What can go wrong, will go wrong.

Would you like to know more? →

How

Use real data from similar projects. Look at how accurate their original estimates were vs the actual time and cost. Ideally, you will use the projects identified in Step 2.1 Use this insight to adjust your estimates for the project and its components. This is your contingency.

Adjustments for Optimism Bias Made?

- ☐ Not addressed yet
- ☐ Recognised but adjustments incomplete
- ☐ Fully addressed with contingency built into estimates

Reason for the rating

Step 4.2
Be Ready to Adapt

Even good plans will need to change. Make regular space for reflection and course-correction.

Why

Helping key people adopt the mindset that things won't always go as planned is the best way to keep everyone calm when circumstances change.

How

- Set up regular check-ins, with your team and key decision makers *(i.e. finance & senior management)* to review progress and adapt as new information comes to light.

- Review your project's alignment with its goals

- Be prepared to adapt quickly based on new information or shifting circumstances.

"Everyone has a plan until they get punched in the face"

Mike Tyson

Would you like to know more? →

Regular Review Meetings Booked?

- ☐ No meetings or reviews scheduled yet
- ☐ Occasional or irregular reviews scheduled
- ☐ Regular adaptation meetings clearly scheduled and followed

Reason for the rating

Step 4.3
Be Ready to Step Away

It's easy to keep going, even when things go wrong. Measure what matters so you know if the project is worth continuing.

Why

Stick it out too long, and you risk dragging everyone into a bad place when people realise the project, option or approach is a dud.

If you cannot throw a proverbial bucket of cold water over yourself and the project directors, you risk constantly chasing your tail and digging a deeper hole.

How

Know when to quit, create measures for success.

- If your solution isn't on track to deliver, be ready to stop and walk away.

- Confirm the benefits of doing your project outweigh the costs.

- Know that, as humans, we are hardwired to keep digging and often struggle to let go of something we've started.

"People think focus means saying yes to the thing you've got to focus on. It means saying no to the hundred other good ideas that there are."

Steve Jobs

Would you like to know more? →

Clear Measures to Know When to Step Away?

- ☐ No clear measures defined
- ☐ Measures partly defined, more clarity needed
- ☐ Clear measures fully defined and documented

Reason for the rating

Have you Proved It Works?
Readiness Assessment

Stop, take stock. Complete this readiness assessment before moving onto the next Job.

Here's how it works

1 Do you have a Plan to make it happen?

2 Complete all Checklists *(See previous pages).*

3 Fix reds, then fix or accept ambers.

Readiness Checklist

Delivery Plan Approved?	Y/N

Success Factor 3 Plan for Speed	
3.1. Think Big, Start Small	
3.2. Learn by Experimenting	
3.3. Keep On Top of Risks	
Overall score (use lowest colour above)	

Success Factor 4 Get Big Decisions Right	
4.1. Adjust for Optimism	
4.2. Be Ready to Adapt	
4.3. Be Ready to Step Away	
Overall score (use lowest colour above)	

Job Status: Prove It Works (use lowest colour above)	

Key

Red: Missing, fix before progressing.

Amber: Progress made, gaps to be addressed.

Green: Ready and good to go.

If overall scores do not update, please select them manually. For best results, use Adobe Reader.

Few projects fully achieve their goals*

Only **47.9%** of projects are on budget.

Within that, **8.5%** are also on time.

And of those, only **0.5%** deliver full benefits.

*Study of over 16,000 projects by the University of Oxford.

"Projects don't go wrong, they start wrong."

Before you go big, spend big, scale up and go all-in:

♠ Do you have a red?

♠ Can you afford not to spend a few weeks to turning it to amber?
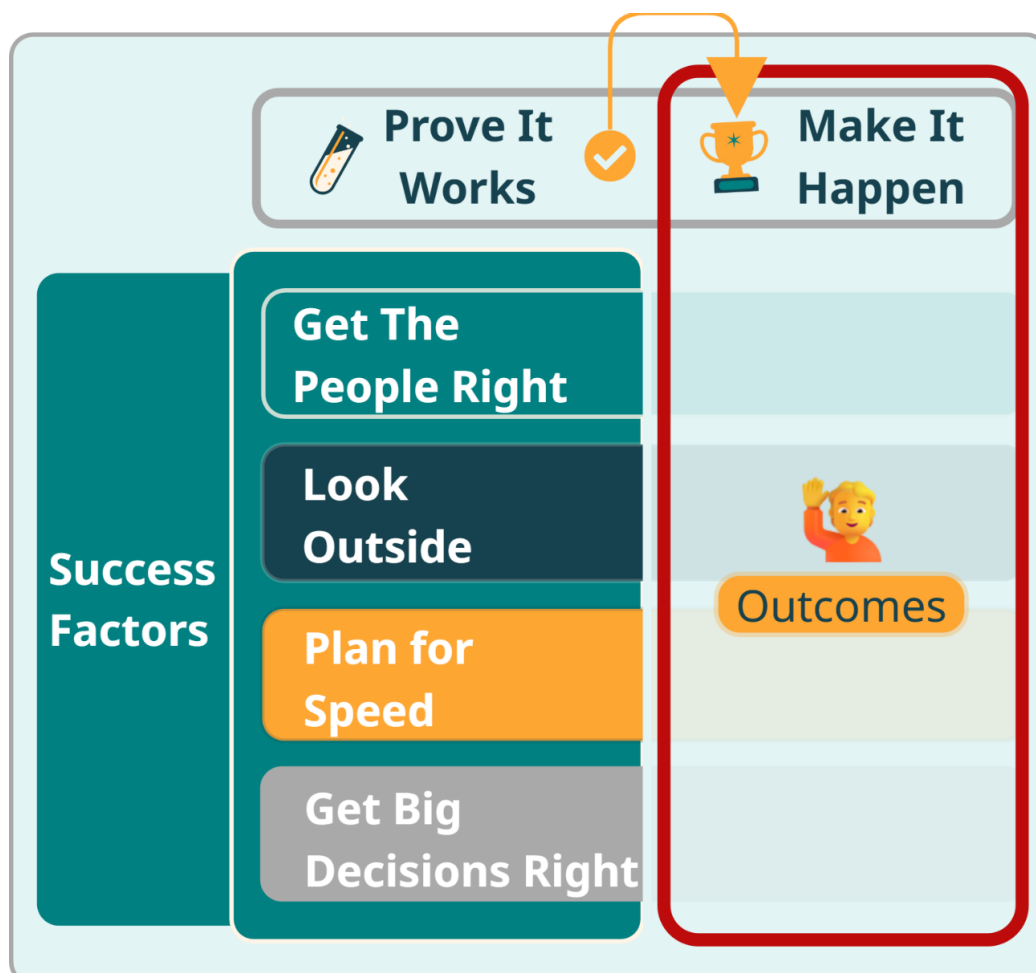
♠ Is proceeding worth the risk?

Job 3: Make It Happen

Q. Your aim for this Job?

A. Outcomes.

That is, people using your product or services in the way that you expected.

Already started Delivery?

Recommendation: Get your team on the bus, go back and complete the Readiness Checklist for Step 1.1 and 1.3. Then enable regular learning to optimise what you do (3.2).

Introduction

Build out, scale up, ensure people adopt your product or service.

Job 3 (Make It Happen) is about turning the dream into a reality. Have you applied the success factors in Jobs 1 and 2? If so, you should be in good shape.

Outcomes — **Produce the big things, with people using them.**

A. Produce your services, solutions, assets, outputs.

B. Get people using and engaging with the outputs.

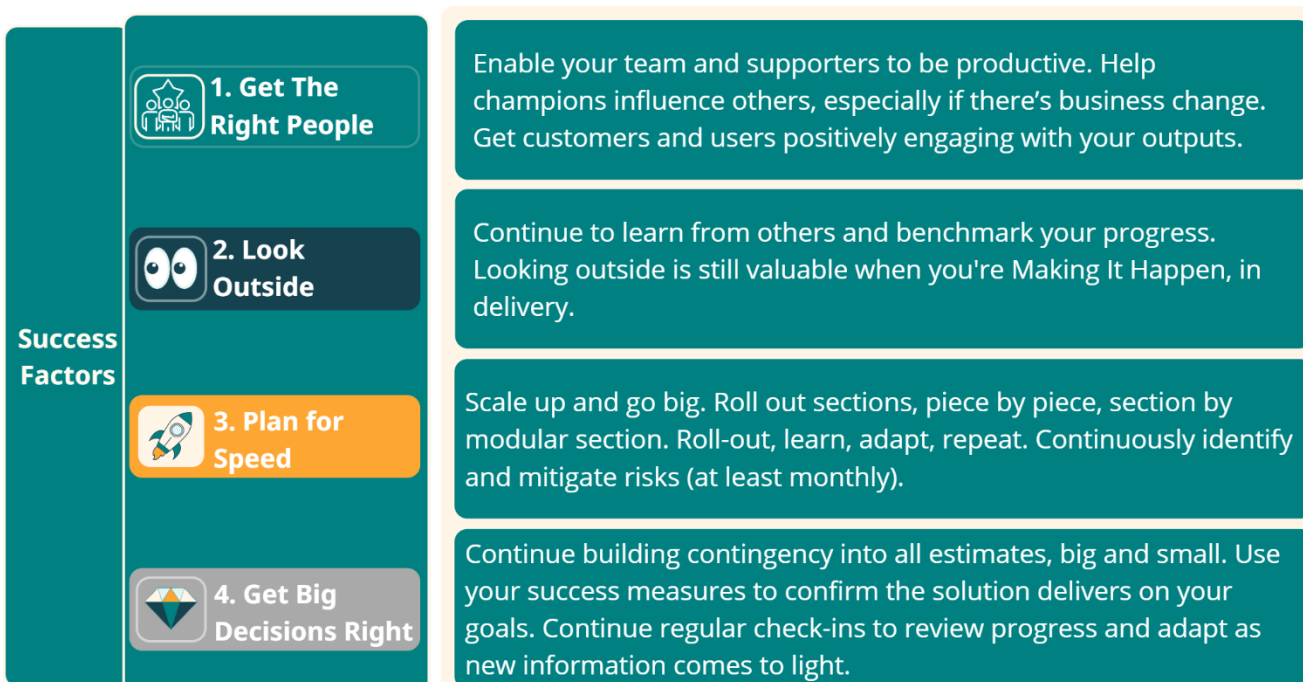**C.** Confirm A+B = Your expected outcomes.

Why

Real project success isn't just delivering something. It is seeing people use, adopt, or buy what you've created.

The real value comes when your products and services make a difference to those who use or are affected by them. That's why active engagement with users and customers is key. Get this right, and you go from producing outputs to achieving outcomes.

How

Continue that good work you started in Jobs 1 and 2, with a few additions:

Success Factors

1. Get The Right People	Enable your team and supporters to be productive. Help champions influence others, especially if there's business change. Get customers and users positively engaging with your outputs.
2. Look Outside	Continue to learn from others and benchmark your progress. Looking outside is still valuable when you're Making It Happen, in delivery.
3. Plan for Speed	Scale up and go big. Roll out sections, piece by piece, section by modular section. Roll-out, learn, adapt, repeat. Continuously identify and mitigate risks (at least monthly).
4. Get Big Decisions Right	Continue building contingency into all estimates, big and small. Use your success measures to confirm the solution delivers on your goals. Continue regular check-ins to review progress and adapt as new information comes to light.

Key Risks

Watch out for these final trips.

♠ The longer the time period, the greater the window for risk to creep in. Plan to deliver with speed. Keep the delivery window as short as possible.

♠ Going from your output to people using or engaging with it won't be a straight line. It will take longer than you think. Grit and adaptability are your friends.

Mindset to Commit

Applying project **E**xpert E**x**perience using the **4** Success Factors from **APEX-4** may mean you need to go against the grain and:

- take a different stance to what others are used to.

- attempt things to which you are not familiar.

- speak up when others do not.

These moments often define whether a project succeeds. To borrow a phrase from another expert, there will be times where you need to *"don a pair of brave pants".*

Know that you are not alone.

Thousands of experts had your same feeling once. They persevered, applied the knowledge, and learned that it worked. They wrote this down, and now you have just read their distilled wisdom.

Closing Note

APEX-4 isn't about painting by numbers or following rules blindly. These Success Factors connect your project outcomes to the foundations for success. But real mastery means making them your own.

You should check whether these ideas fit your project, and don't be afraid to adapt or add your own.

Use this playbook as a source of inspiration and a toolkit, not a rigid recipe.

If you keep testing what works and connecting to your own Success Factors and good practice, you'll dramatically increase your odds of delivering outstanding outcomes. No matter what surprises the world throws at you.

Deliver successful outcomes and enjoy the journey.

Resources

Next Steps

Using Success Factors

Resources

About

Next Steps

Now you've made it this far, can you tell us, did it work?

The plan was to release this version of APEX-4 as V.04, this is the Founder's release. Led by Greg Krawczyk, supported by the Founding Collaborator Experts. The aim is to help others get value from the framework.

We also need to help APEX-4 evolve so it becomes the product we want it to be.

Below are options to help you keep the momentum going.

1

Go Online to the APEX-4 Core area

The future of this project Success Factor framework is online. Checkout the growing body of resources to help you connect with Success Factors

Click Here →

2

Help shape the future of Project Success Factors

If this framework helped you in any way, please consider sharing your story. Think of it like an Amazon review.

- Your feedback helps others that APEX-4 is worth it.
  More users mean we will be likely to develop more features.

- It takes just 2 minutes, and you'll make a real difference.

- Thank you for your support.

Click Here →

3

Have Your Say: Help Shape What We Build Next

Vote for the features or tools you'd be most excited to see. Your choice will give you early access, sneak peeks, and special updates.

Click Here →

Using Success Factors

Applying some of these Success factors won't feel comfortable. That's OK and normal.

If you're not "feeling" some Success Factors, it may simply be because you haven't experienced using this way of working before.

Remember this before you decide to skip a success factor:

- The Success Factors have been distilled from thousands of experts.

- They have learned that these techniques are their key tools. Some call them rules of thumb, shortcuts, or secrets, some call these hacks.

- You can be sure that most would tell you that you really should be tapping into these Success Factors. Unless you have a good reason.

Take the Success Factor Resonance Test →
Quick tools

Doing something new is about practice, which means giving it a go.

Try this:

Identify one, small, easy thing that you could do now to start delivering against the Success Factor.

For Example: Look Outside

Going out and asking others how their projects went is something that makes a lot of people feel uncomfortable. But, you really should do that.
So, one small thing?

Could you ping an email around, or a fire off a quick social media message, you probably know someone who knows someone.

Resources

Website Resources

The playbook gives you the foundation. The website provides depth.

Visit the Resources & Support area at

www.confluity.co.uk/success-factors/members/

About

Confluity exists to help you connect your projects and ideas to the things that drive success. We combine research-backed methods with practical tools, so you can lead change with clarity and confidence. Whether you're tackling complex transformation or delivering everyday goals, our focus is on helping you get results that matter.

Greg Krawczyk, Founder at Confluity and a Chartered Project Professional. Greg has led and overseen hundreds of projects, spanning many industries. He is a long-time volunteer with project management professional bodies (APM & PMI).

Focusing on Strategic Misrepresentation and Human Behaviour in Project Management, his events are well attended. Greg has been leading on this topic within the Association for Project Management's Governance Interest Network since 2022.

To contact Greg, provide feedback or ask questions, email Greg@Confluity.co.uk

Acknowledgements

This Playbook would not have been possible if it weren't for the experts, contributors and reviewers who kindly provided their time: Acknowledgement List

Thank you!

An APEX-4 Journey

How your journey applying expert experience may unfold.

Act 1 - Departure

Life ticks along. You want something more, to earn more, build stronger relationships, or simply feel happier in your job.

But turning your ambition into reality feels difficult.

Then you find and read APEX-4, your mentor, your guide. You commit. The journey begins.

Act 2 – Initiation

You face tests. You meet allies and resistance. Your project, and your resolve, are stretched.

You return to your Success Factors guide and revisit the Readiness Assessment. You spot gaps, Success Factors you skipped because they felt unfamiliar.

You persevere. You lean in to apply even the unfamiliar Success Factors, supported by the online community and resources.

- Getting the People Right
- Looking Outside
- Planning for Speed
- Making the Big Decisions

You unlock progress. You win the breakthrough. The idea takes off. Others see it too. You win their respect.

Act 3 – The Return

You are changed. You've applied the knowledge passed to you by Apex-4, you have Set The Direction and Proved It Works. You've reflected on the journey.

But the real test comes when you Make It Happen, where the risk is highest and things can go wrong fast.

This time, you're ready. You've reached the apex, having APplied Expert eXperience. The four Success Factors.

The results follow with recognition, pay rises, promotions, and fresh respect from those around you.

With those insights, you write your own Success Factors and customise your plan for what comes next.

Then you do what the best people do. You share it. You help others succeed, too.

APEX-4 Project Expert Formula™

Apply Experience. Four **Success Factors**. Solid Foundations.

	Start Here	Set the Direction	Prove It Works	Make It Happen
Success Factors	Get The People Right			
	Look Outside			Outcomes
	Plan for Speed			
	Get Big Decisions Right			

Confluity™ 2025 ©