







A large, faint, light purple network diagram is centered in the background. It features a central node connected to several other nodes, which are further connected to more nodes, creating a complex web-like structure. The nodes are represented by circles of varying sizes, and the connections are thin lines.

# Adoption of a PPM Solution Using An Agile Approach

Andy Robinson

# Agenda

-  Drivers for using a Portfolio and Project Management system
-  Organisational maturity
-  Where to start – Planning, delivery, realisation
-  Phased approach for implementing a PPM system
-  Pitfalls
-  Questions




# Background on Ninth Wave

- **Ninth Wave is a UK-based software and services firm established in 1995**
- **main software product is SmartCore, a proven web-based management support tool**
- **developed from practical experience of project and programme management**
- **SmartCore is unique - it is entirely configurable via the web browser to meet a wide range of information needs for both organisations and individuals**
- **Flexible licensing model including Software as a Service option**

# Landscape

-  A survey of executives on portfolio management capabilities found that:
  -  47% of organisations do not monitor and track projects centrally
  -  57% have no criteria defining project success
  -  68% don't track project benefits
  -  89% don't use earned value to track project success (Kellogg, 2003)
  
-  68% projects don't deliver to time, budget or business goals (MIT Sloan, 2004)
  
-  A Total Economic Impact™ (TEI) analysis shows that a comprehensive PPM tool investment is likely to provide an ROI of more than 250% (Forrester Research, May 2009)
  
-  Enterprises with good IT governance earn at least 20% higher growth rate (CIO, 2005)
  
-  Portfolio planning reduced failed project rates by 25% (Gartner)

# Key Features of a PPM system

-  Project evaluation process
-  Cost and benefit measurement
-  Workflow to enforce governance
-  Status reporting
-  Resource and capacity planning
-  Communication of key portfolio and project data
-  Not just a tool for IT – integrated with the business objectives/strategy

# Organisation Maturity Levels – Overall



## Comparison of Competency across Maturity levels

Competency Area	Maturity Level
Strategy	1: Informal
Process	2: Defined
Tools/technology	3: Managed
Organisation capability	4: Measured
	5: Optimised



# Overall Implementation Framework



## Time horizon







- 2 – 3 year window depending upon maturity
- Comprehensive communications plan
- Plan for delivery cycles every 3- 4 months
- User champions as initial users
  - Reduces training and fosters more positive adoption

## Module deployment

- Look for “quick wins” – automate the mundane
- Avoid “strait jacketing” users
- Don’t underestimate interfacing requirements
- Avoid “science” based rules

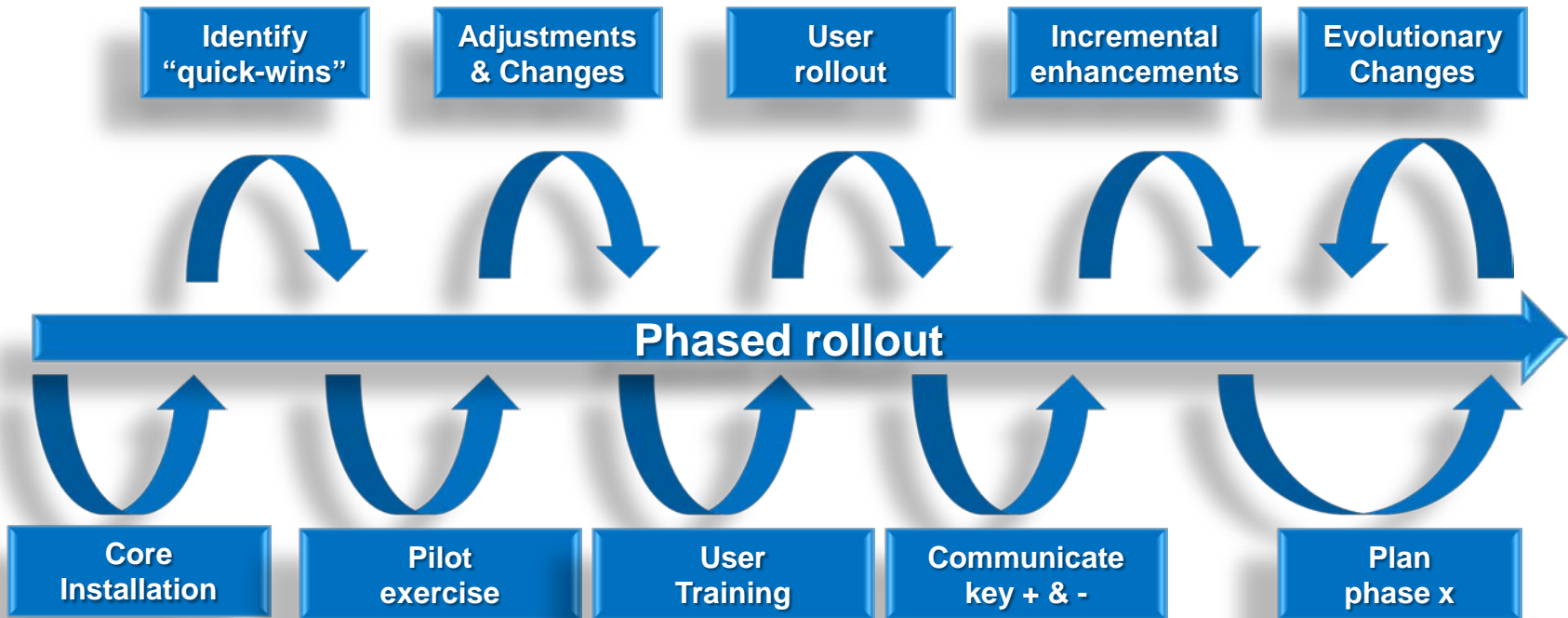


# Organisational Considerations

-  Maturity levels will vary by department, location
-  Management – key performance data needs to agreed
-  Ability to take on a change programme alongside BAU
-  Handling projects that cross departmental boundaries
-  Use Delphi techniques to get consensus
-  Avoid over reliance on financial measures



# Agile Implementation



# The arena



# Starting Points

## Portfolio planning

-  Top down
-  Bottom up

## Project Management

-  ACRID data
-  Reporting
-  Programme management
-  Resourcing

# Portfolio planning – Top Down

- Strategy plan
- Develop common vocabulary for terminology
- Needs leadership and management commitment
- Develop criteria for project selection
  - Initial criteria likely to be financial
  - Refine as candidates progress through the funnel
- Use questionnaires to standardise data collection
- Use AHP or “pair-wise” comparison to rank candidates
- Take into account projects “in flight”

# Portfolio planning – Bottom Up

- Also known as Grassroots
- Projects may or may not support strategy
- Projects may conflict with one another
- Develop standard project plan templates
  - Avoid getting bogged down in the detail
- Develop project abandonment criteria
- Costs easier to aggregate as opposed to resources

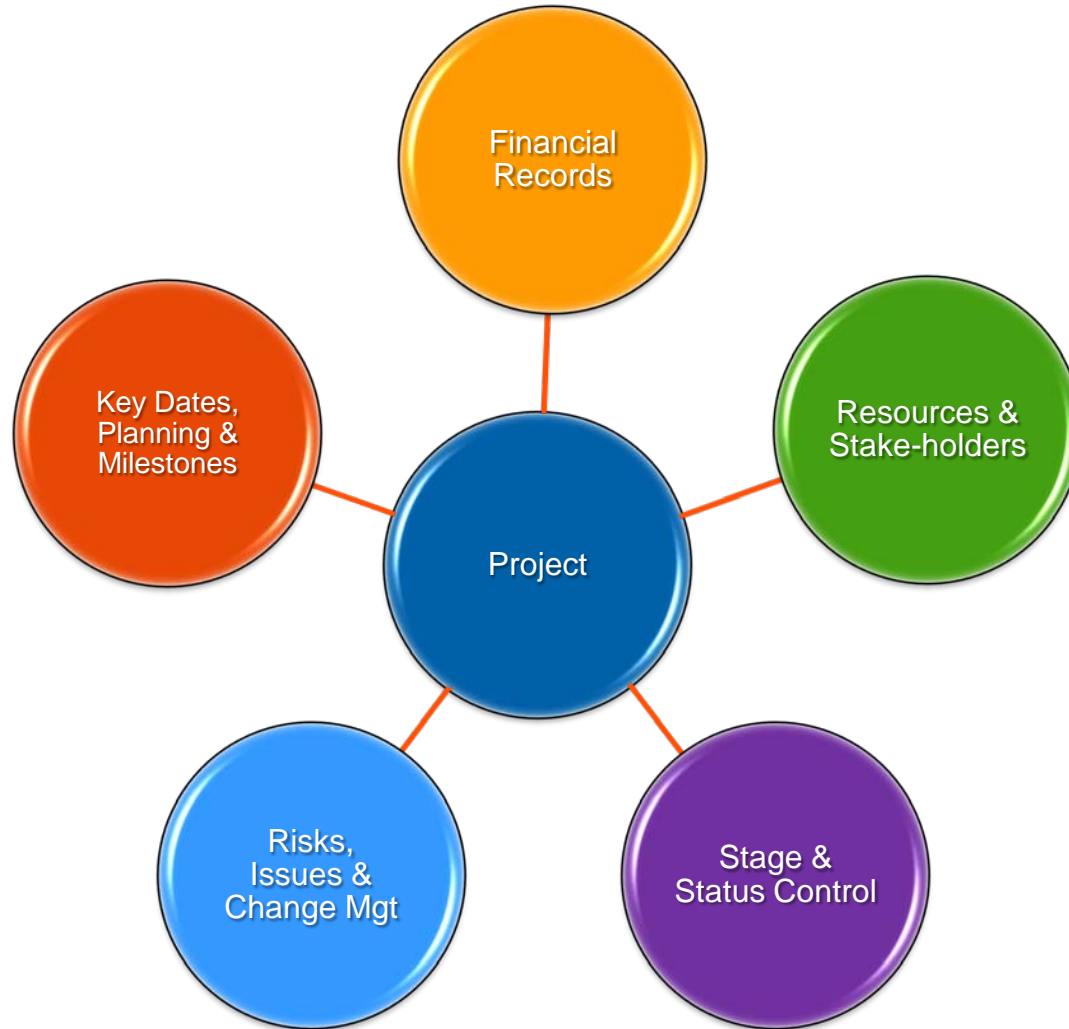
# Using AHP to prioritise strategy

- Use a pairwise grid to compare the relative importance of each pair of factors – in this case, strategic drivers.
- This will create a score for each driver expressed as a percentage of 100%.

Q. Are the Elements on the left more important than the Elements along the top?

Category	Customer Awareness	Customer Service	Internal Relations	Technology Based	Internet	TV	Cost Reduction	Printed Media
Customer Awareness		Equal	Equal	Strongly More Important	Equal	Equal	Equal	Equal
Customer Service			Equal	Strongly More Important	Equal	Equal	Equal	Equal
Internal Relations				Strongly More Important	Slightly More Important	Slightly More Important	Equal	Equal
Technology Based					Slightly Less Important	Slightly Less Important	Strongly Less Important	Absolutely Less Important
Internet						Equal	Equal	Equal
TV							Equal	Equal
Cost Reduction								Equal
Printed Media								

# Project Management – what to track



# Project Management

## Project

- Identification Number
- Name
- Description
- Department / Division / Business Unit / Workstream
- History / Audit Trail
- Technical Specification / Vision / Blueprint
- Processes & Procedures

## Resources & Stakeholders

- Resource Requirements
- Resource Allocation & Shortfall
- Task Assignments
- Project Manager/s, Administrator, Support Staff
- Sponsor/s, Customer / Business Lead
- Governance, Stage Signoff, Change Approval Authorisers

## Stage & Status Control

- Current & Next Phase / Stage
- RAG statuses for Scope, Planning, Resource, Financial, Outcome
- Proposal, Brief, Business Case, Project Initiation Documents
- Progress, Stakeholder & Stage Review Reports
- Products / Deliverables Log

## Risks, Issues & Change Management

- Risks, Issues, Assumptions, Lessons Learnt Logs
- Risk & Issue Analysis, Impact & Probability Evaluation & Scoring
- Risk & Issue Resolution / Mitigation / Escalations / Exceptions
- Change Log, Assessment and Authorisation

## Key Dates, Planning & Milestones

- Project Start Date
- Estimated Completion Date
- Plan Tasks & Milestones
- Dependencies
- Stage Completion & Review dates
- Reporting Cycles

## Financial Records

- Budget
- Forecast
- Actuals
- Variance
- Accruals
- Earned Value Analysis



# Project Management – the basics

- ACRID logs
- Project deliverables – Business case, PID
- Project plans – PPM tool or MS Project
- Financials – actuals, budget, forecasts
- Resource allocation – keep it simple
- Inter project dependencies
- Document management
- Project journals
- Status reporting

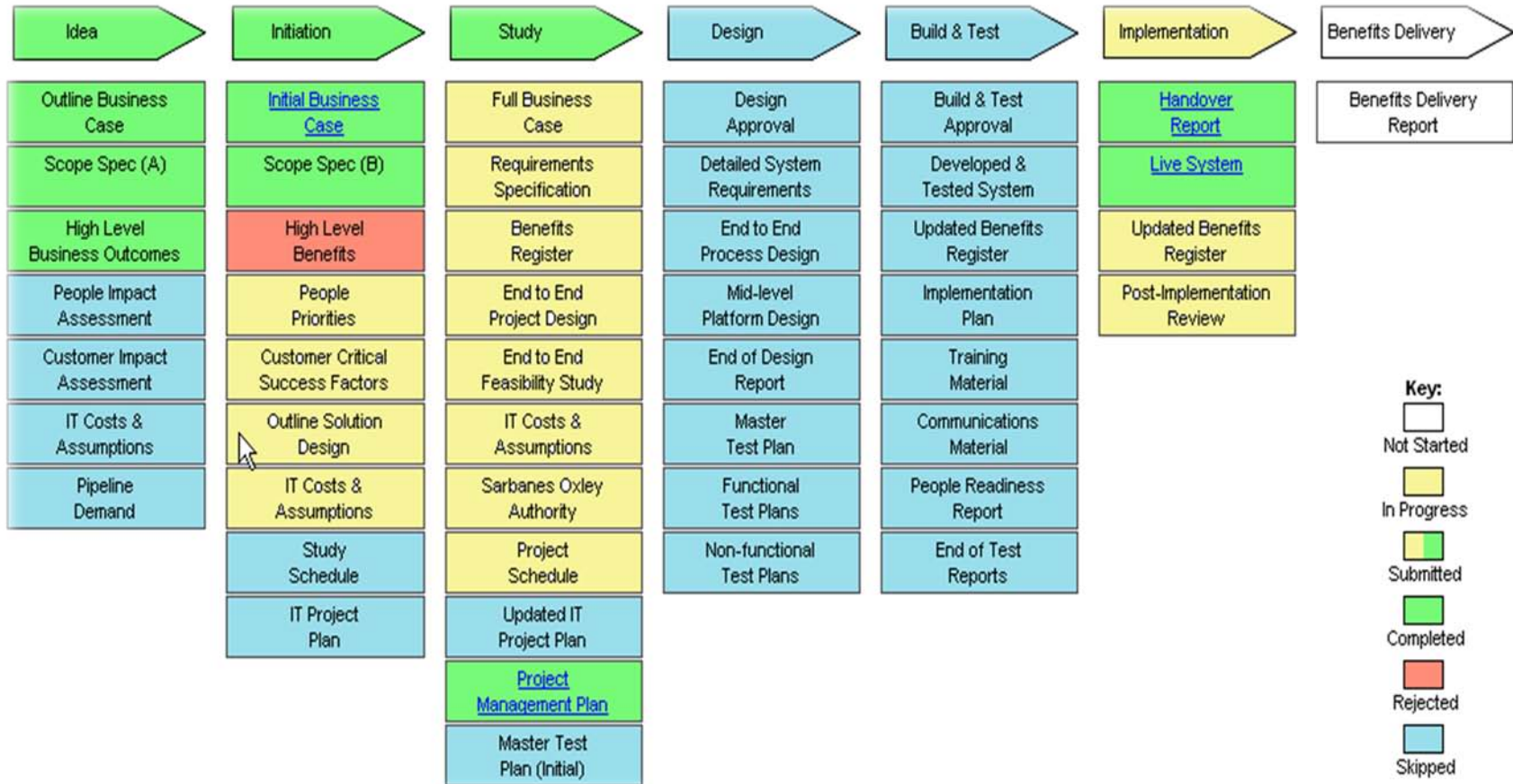
Adopt a light touch with regards to processes and deliverables

Identify “quick wins” for project managers as they are key users

# Project Management – advanced

- Project lifecycle roadmaps
- Support for approval of deliverables, milestone progression etc.
- Workflow to ensure governance and compliance
- Trend analysis – e.g. Project slippages
- Project estimation templates and metrics
- Financials – variance, accruals, transfer pricing
- Earned value – avoid if possible
- Benefits tracking
- Lessons learned

# Business Project Roadmap



**Key:**

- Not Started
- In Progress
- Submitted
- Completed
- Rejected
- Skipped



# Project → Programme Management

- Multi criteria programmes – e.g. business stream, technology platform
- Trend analysis – Manage by exception
- Milestone based reporting
- Resource and capacity planning
- Escalation process for risks, resourcing, slippages
- Governance and non-compliance management
- ROI metrics
- Benefits tracking
- Support for different maturity levels across an organisation

# Programme Management Dashboard

Change Management Toolkit

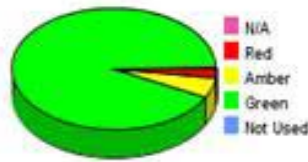


Division: Financials | Project Logs | Documents | Significant | Non-Compliance | Time | GCMC

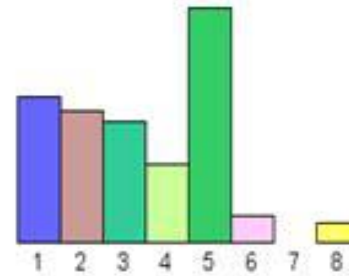
Division: W&B Edit View Comment Help

Division Name: W&B

Issue Summary	
High	73
Medium	63
Low	13



Projects By RAG



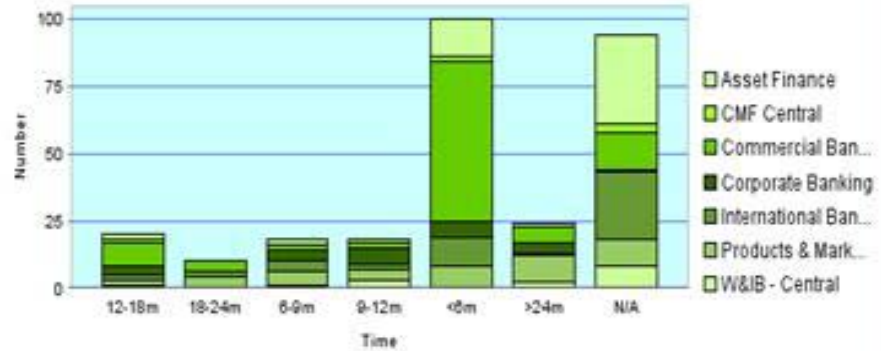
Non-Compliant Projects











Division Risk Summary

Projects | Segment/Theme | Duration | ROI | Earmarked/Approved | Business Units | BU PSFs | Reports | Staff






	N/A	<6m	6-9m	9-12m	12-18m	18-24m	>24m	Total
Asset Finance	33	14	2	1	2		1	53
CMF Central	3	2			1			6
Commercial Banking	14	59	2	2	9	4	6	96
Corporate Banking	1	6	4	6	3		4	24
International Banking	25	11	4	2	2	2	1	47
Products & Markets	10	8	5	4	2	4	10	43
W&B - Central	8		1	3	1		2	15
<b>Total</b>	<b>94</b>	<b>100</b>	<b>18</b>	<b>18</b>	<b>20</b>	<b>10</b>	<b>24</b>	<b>284</b>










# Resource Management

-  Assignment of resources to projects
-  Time horizons for moving from generic to named individuals
-  Management of outsourced resources
-  Time tracking
-  Assignment of resources to project plans
-  Hard, soft and headcount categorisation
-  Support for varied work patterns
-  Allocate roles and responsibilities

# PPM - Extensions

-  Supplier management and involvement
-  Social networking system for PMs
-  Tool to support staff appraisals and identify training needs
-  Scenario modelling
-  Time recording

# PPM - Deployment Pitfalls

-  Not treating PPM rollout as a management of change programme
-  Pseudo-scientific rules for categorising data
-  Applying rigidity too early to processes
-  Providing too much detail for senior managers
-  Resource management – may need to change the way the organisation currently works
-  Earned value – difficult for stakeholders to grasp
-  Benefits management – more complex than just recording benefits



A large, faint network diagram in the background, composed of purple spheres of varying sizes connected by white lines, representing a complex network structure.

# SmartCore

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