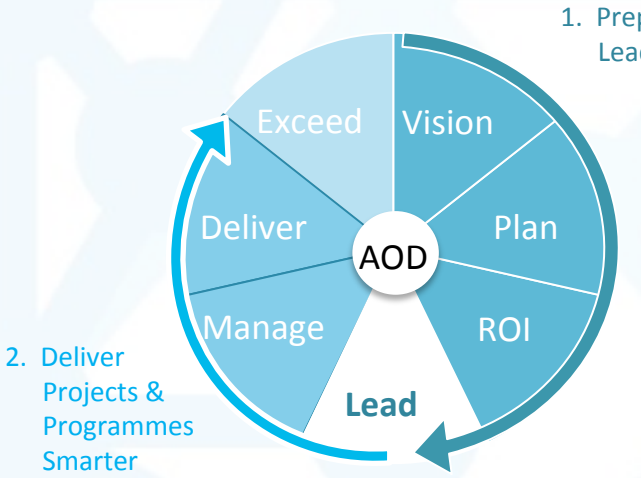
Assured Outcome Delivery & ez:PMO =

Starting and Controlling Smarter

Learning from experience** and ODN's Implementing Smarter approach (incorporating ezPMO***)



* Assured Outcome Delivery

** Prepare Better!

*** pronounced easyPMO

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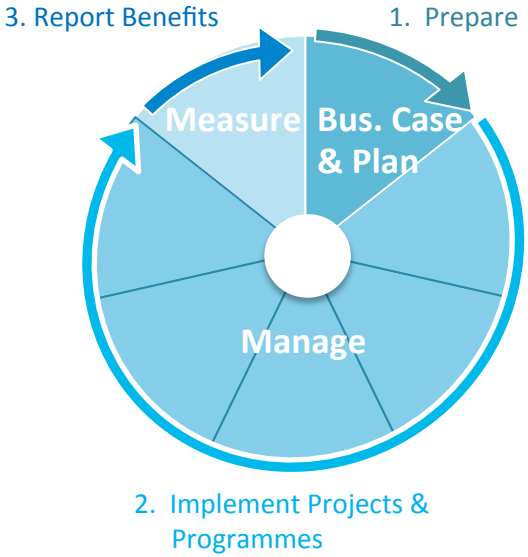
Assured Outcome Delivery

How to Accelerate PMO Set up and increase control effectiveness with AOD * and

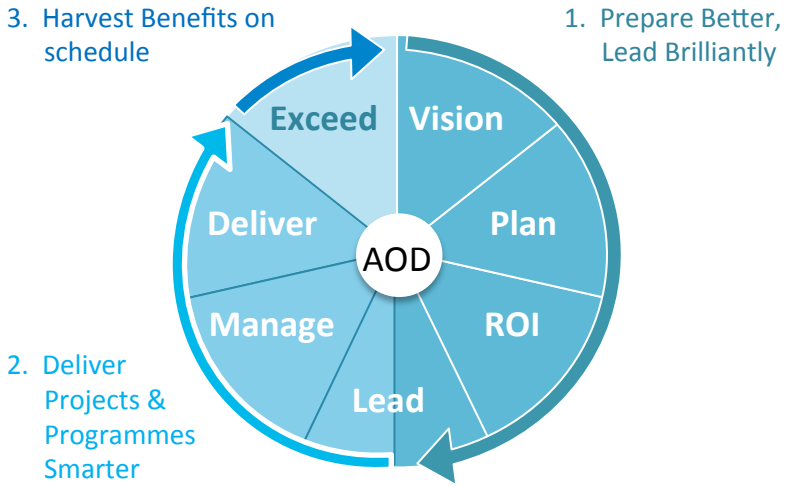
ezPMO

In the rush for progress….



We get stuck in using traditional approaches, without learning from our experience

But what if we learn from our experience and plan to address the issues we all know…..?



…….and spend enough time planning and preparing to increase confidence and capability in the outcomes we deliver with AOD!

PROPER PREPARATION WILL ACCELERATE DELIVERY & INCREASE BENEFITS ACHIEVED, SO **DO YOU RECOGNISE** ANY MISTAKES ALONG THE TRADITIONAL ROUTE OVERLEAF?

1.Prepare

Wouldn't it be great if we could learn from experience and avoid repeating the mistakes we all know happen in setting up and running P3 and PMOs?

RECOGNISE ANY MISTAKES ALONG THIS TRADITIONAL ROUTE?

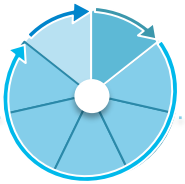
1. Start with a series of project ideas grouped as 'solutions' to problems and/or opportunities.

2. Certainty falls away quickly, because of no / limited view of overall investment direction.

3. Cost estimates are based on product-set 'brochure-ware' with fat contingency and inflated or understated people costs.

4. Rough (sometimes fabricated) "benefits" estimates are stated; just enough to exceed costs.

5. Seek corporate Approval decisions (based on shaky business cases) but everyone accepts "that's just how it always is".



2. Implement

6. Repeat project scoping n times across business units (often independently).

7. Form a programme or portfolio of projects grouped together for justification and/or management purposes, including pet projects looking for budget.

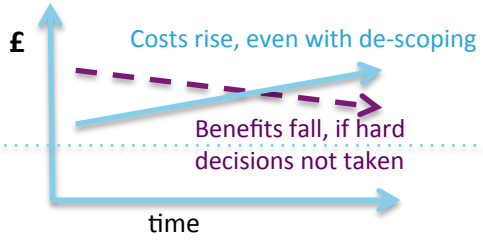
8. Select Project Managers and task them to make plans and write PIDs independently.

9. Allocate resources and start work and expenditure before Authorisers / Sponsors REALLY know deliverables and outputs.

10. Even after start, different people – Authorisers, Sponsors, Managers, Staff, Customers, PM, all have different expectations.

11. PMO is brought in or appointed to try and 'herd' the project effort / PMs into one programme for sponsor convenience.

12. It takes an age to pull programme or portfolio governance together and to agree reporting formats.

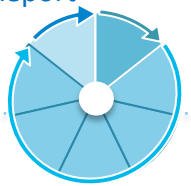


13. It is eventually realised that poorly-specified projects will not create strategic value, or will under- deliver on brochure benefits promises, so there is dissatisfaction with the planned change programme or change processes.

14. Look at inter-programme / project dependencies and risks properly for the first time.

15. Establish proper governance across work streams and programmes for the first time.

3.Report



16. Realise there is an overreliance on key resources and IT elements dependencies.

17. Sponsor / Management realise the need to manage better but no-one is brave enough or has the evidence to CULL projects not delivering benefits.

18. See suboptimal project and programme performance: resource criticality causes delay, costs rise, benefits are less than expected as hard decisions were not taken (especially headcount efficiencies). But everyone accepts "that's just how it always is".

19. 'Blame storming' and history rewrites to massage benefits and document excuse reports.

20. Will we ever decide to learn from PMO / delivery mistakes of the past?

??? Lessons

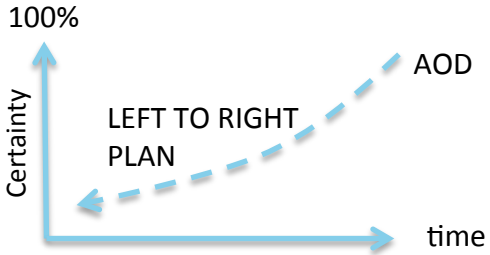
….so how about a way to prepare better to deliver outcomes and desired benefits?

Accelerate PMO set up and provide ***great*** management reports for Assured Outcome Delivery with ezPMO

1.Prepare Better, Lead Brilliantly

1. Start by defining desired outcomes unambiguously

2. Produce a list of show-me change events with all Sponsors and Stakeholders. Systematically check the fit with strategic priorities.



3. Result: consensus and buy-in from the top. Certainty established at the start, led by the Executive team and sponsor

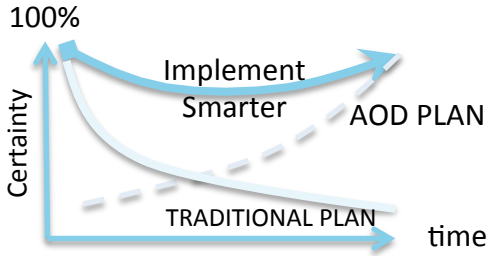
4. Create right to left (Lean) plans for each outcome - tipping point / milestone level – innovation Qs strips out contingency. Delegate 'Show-Mes' to Level 3 Managers. Delegate authority to Project Management to flex the route.

5. In parallel, systematically find ALL the cash benefits, using Value Drivers and 'Show-Mes'. Connect to the accounts. Estimate CashPoints with Bias-Free Estimating

6. Compare all projects across the right to left plan. Realise plan overlaps and see synergies between plans highlighted by tipping-points.

7. Develop key project milestone "network". Highlight which projects may not be critical to value delivery.

8. Challenge PMs and merge right to left plans with on-going forecast plans

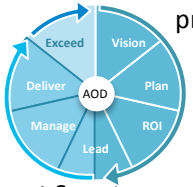


9. CULL non-value adding projects to LEAN the portfolio / programme before starting to commit effort and expenditure.

10. Use well documented AOD / ezPMO processes and templates

11. ezPMO supports new project plan development at milestone level

2. Deliver Smarter



12. Disciplined prestart challenge reveals dependencies and programme risks, and produces REALISTIC bias-free benefit and cost schedules.

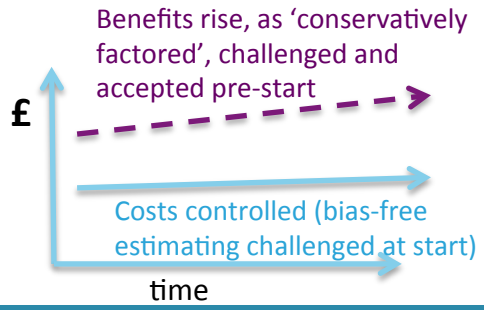
13. Focus key resources on business critical project / programme elements by constructing ROI Connect table, showing the value of each stream and risk

14. Create precise definition of deliverables needed to achieve each 'Show-Me' change event

15. Establish proper governance across work streams and programmes. Plan resources allocation properly. Use automated reporting in ezPMO for progress towards dated show-me events, achievements of outcomes, obstacles (risks) to progress, cash benefit flows, costs

16. Implement Smarter. Appoint PMO & Project Managers to deliver IT, buildings, etc. to support Managers with outcome responsibilities.

17. introduce Benefits control process through rigorous risk management, and reward dashboard. Stop projects / re-route / re-authorise on the basis of value-at-risk.



3. Harvest Benefits

19. 'Measure and report benefits, reward success and document and share lessons learned

20. Share experience with other PMs and partners

18. Inspect Outcomes – binary decision:
- show me: is it happening or not?

COULD THIS IMPROVE YOUR CURRENT APPROACH FOR CHANGE DELIVERY?

ezPMO Set Up

1 Each element of source data updated by PMs

Risk and Issue Management

Status Reporting

Planning

Resource Management

PM updates source

2 PMO uses Report Control Centre to generate Powerpoint report

Report Control Centre

Content of reports

Creation of KPI and metrics

3 Additional ad-hoc materials added to report

4 Report issued for use in relevant forum

Board

Workstream

Project

Reporting uses a PowerPoint template file that contains the branding for the design of reports that are generated.

=Sharepoint

Pre-built templates, incorporating SMEs Right to Left Plans, Tipping Points and reporting frameworks, resource schedules and PMO analytical tools……..How would you like to start change programmes with these and AOD on day1

How AOD and ezPMO will help improve your outcome delivery successes

- Benefit from tried and trusted project management artefacts, built around the AOD methodology.
- Turn-key solution that uses the technology in situ - with simple configuration to provide the information and format needed.
- View information in the right context –
  - what are the risks associated with a specific “Show Me”?
  - what plan activity contributes to CashPoints?
- Remove PMO set up cost and reduce report preparation time through automation.

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Example : Back Office Operations Summary Report

Show Me Event

Workstream	Show Me Event	FI Date	LI Date	Total MS	Open	Red	Amber
Back Office operations improvements.	I am shown how our back office operations provide intelligent information, proactive challenge and support to the project teams to enable them to deliver to time, budget and with excellent client satisfaction.	30-11-15	09-02-16	7	7	3	

Tipping Points

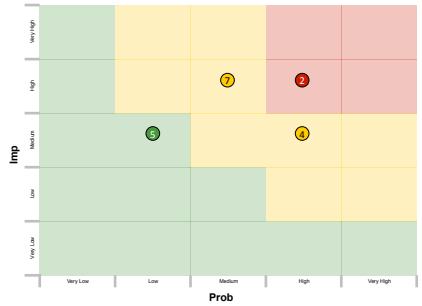
Tipping Point	Description	Total MS	Open	Red	Amber
Challenge Workshops changes signed off.	Our challenge workshop feedback day was well received with attendees from all functions whp agreed the proposed changes	0	0		
Accurate estimates for Senior Stakeholders.	We got senior stakeholder group confirmation that the proposed process changes would enable them to develop accurate estimates	4	4	3	
Intelligent information provided for back office ops,	I am shown how our back office operations provide intelligent information, proactive challenge and support to the project teams to enable them to deliver to time, budget and with excellent client satisfaction.	3	3		

SME Timeline

Milestones L1 L2 L3 L4 L5 Dependency Variance to baseline RAG Announcement Report Date Day 1 Day 2

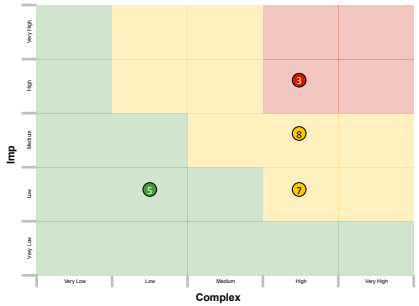
Programme	ProjectTitle	22 AUG 16	29 AUG 16	05 SEP 16	12 SEP 16	19 SEP 16	26 SEP 16	03 OCT 16
Programme 1	Project 1.1			Determine the extent to which joint account planning can be entered in to prior to Day 1 (08/09)	Obtain bid management processes for both businesses (08/09)	Brief sales team regarding selling techniques and guidelines (03/10)		
	Project 1.2			Agree the impact of the enlarged group on the average Balance Sheet spreads and margins (06/09)				
Programme 2	Project 2.3	Identify all HR services provided by corporate / group parents in both businesses and evaluate the implications of the deal on these services. (25/08)		Agree management and board reporting formats and for New Co. (16/09)				

Risks



Programme	Project	Risk	P	I
Programme 1	Project 1.1	Separation Supplier Costs		
		Transformation		
	Project 1.2	Bank Code change		
	Project 1.3	Payments TSA: Internal approval		

Issues



Programme	Project	Issue	Control	Imp
Programme 1	Project 1.2	Lack of resources		
		Business Engagement		
		Client consent and objectors		
		Payments TSA: Regulatory Approval		

AOD ezPMO Report Template : Contents

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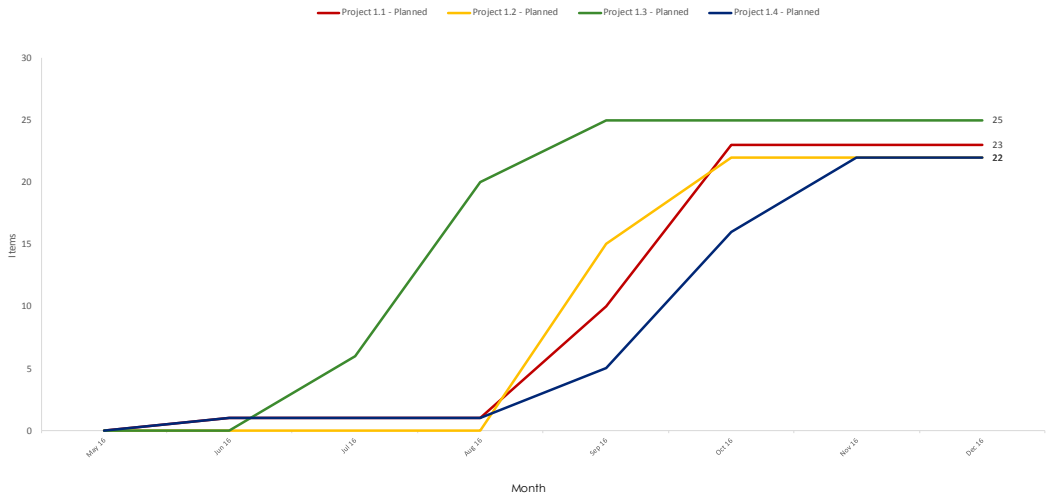
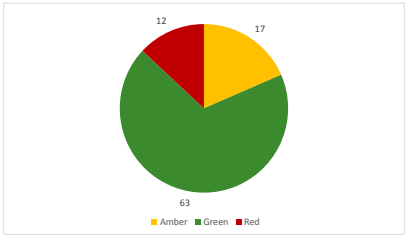
Programme Plan Analysis (Programme 1)

Activity by Project



RAG Status



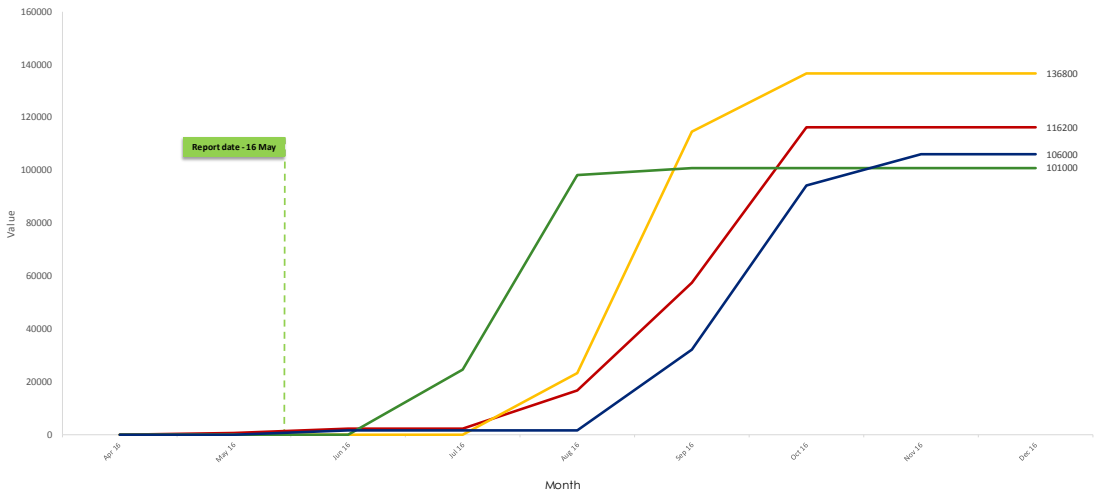
Plan Activity By Level

		Level 1						Level 2						Level 3					
Total # of Tasks	%Complete	Total	Open	Comp.	Late	Amber	Red	Total	Open	Comp.	Late	Amber	Red	Total	Open	Comp.	Late	Amber	Red
72		23	23			3	5	31	31			9	4	18	18			5	2
		Level 1 %complete						Level 2 %complete						Level 3 %complete					

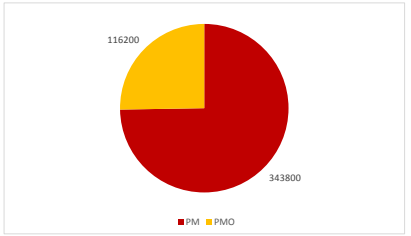
			Level 1						Level 2						Level 3					
ProjectTitle	Total # of Tasks	%Complete	Total	Open	Comp.	Late	Amber	Red	Total	Open	Comp.	Late	Amber	Red	Total	Open	Comp.	Late	Amber	Red
Project 1.2	17		5	5			1	1	8	8			1	2	4	4			1	1
Project 1.3	20		8	8			1	1	7	7			3		5	5			1	
Project 1.4	17		5	5			1	1	10	10			2	2	2	2			1	1
Project 1.1	18		5	5				2	6	6			3		7	7			2	

Programme Finance Analysis (Programme 1)

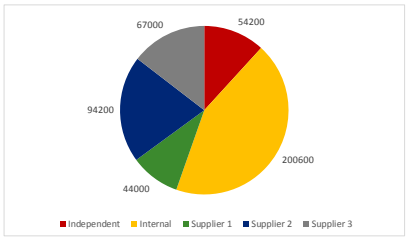
Finances by Project



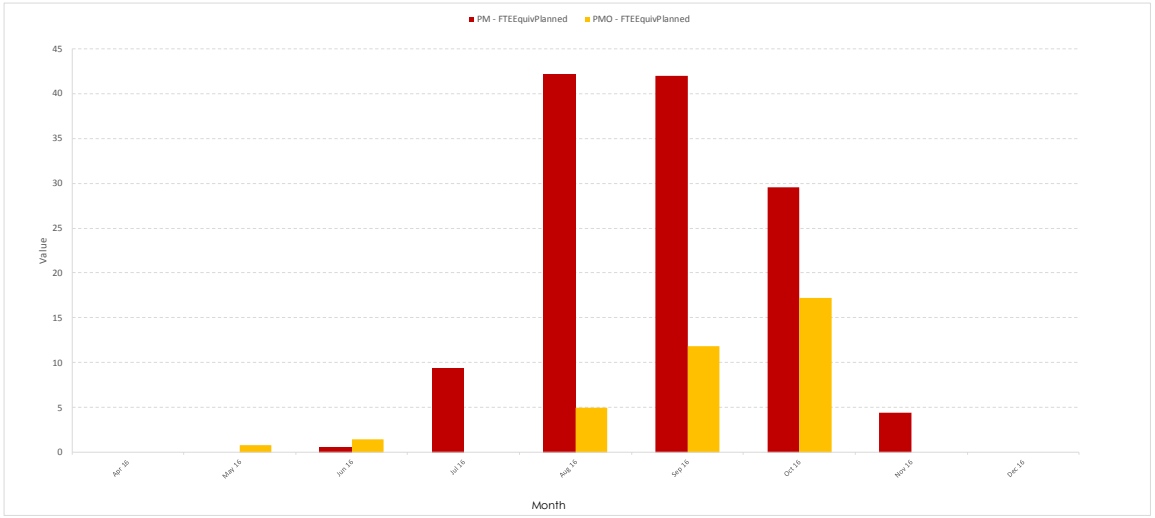
Finances by Type



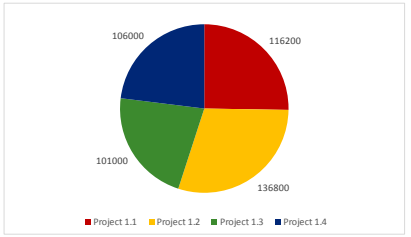
Finances by Source



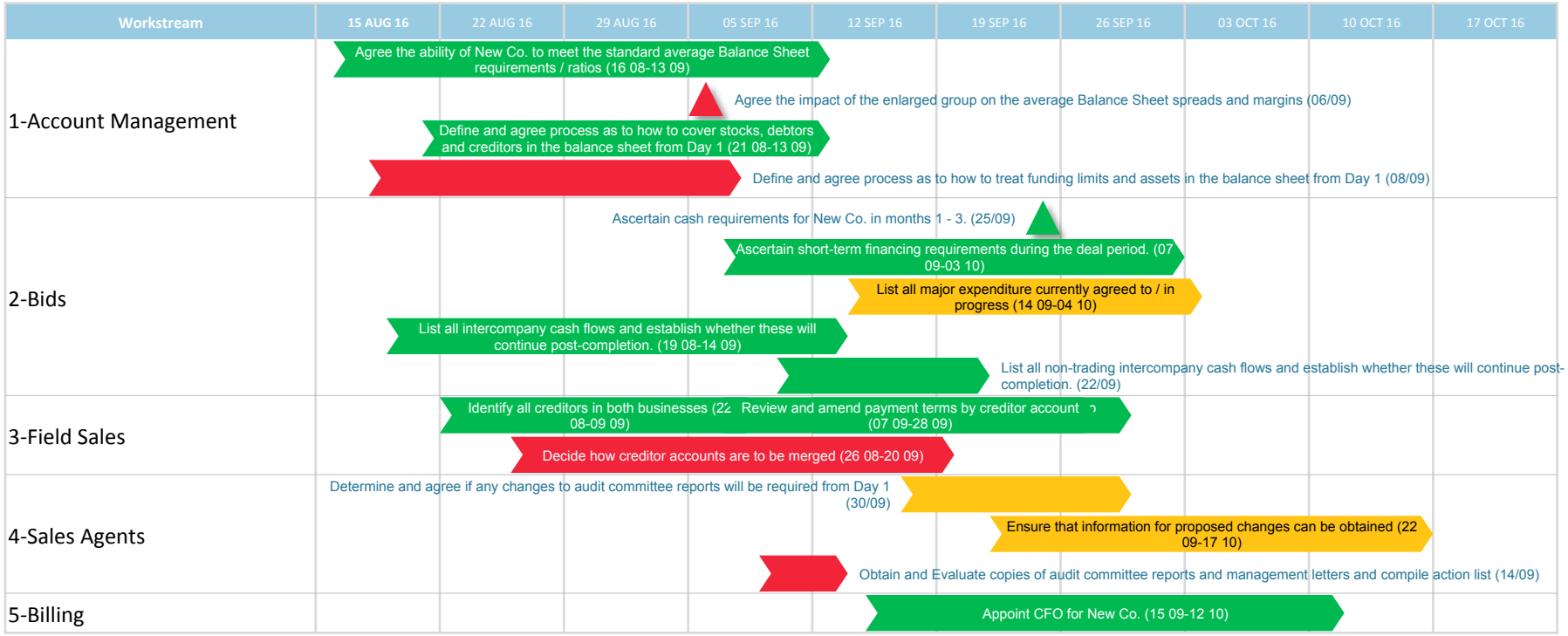
FTE Requirements by Type



Finances by Project



Project Timeline (Project 1.2)



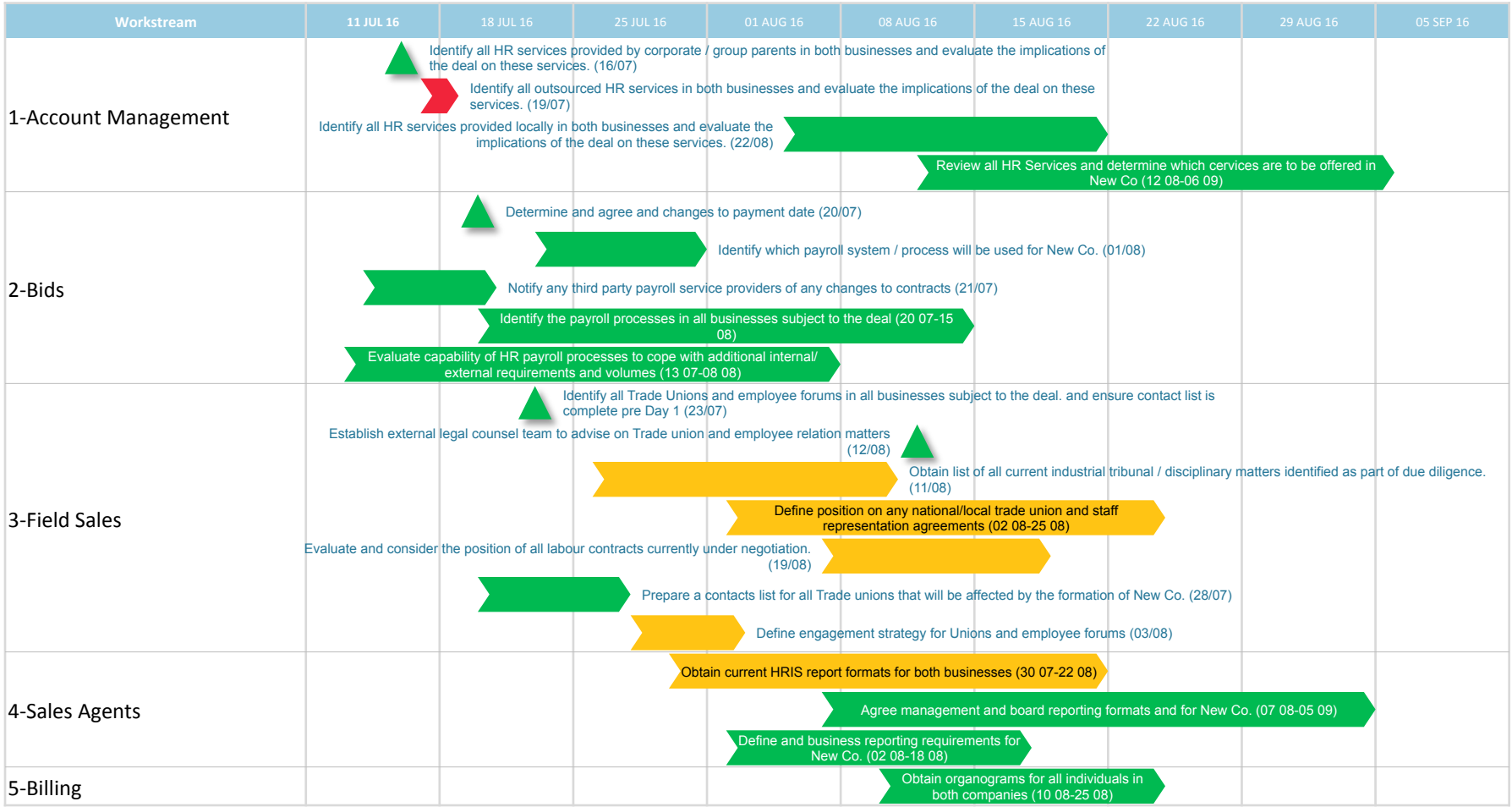
Milestones L1 L2 L3 L4 L5

Dependency

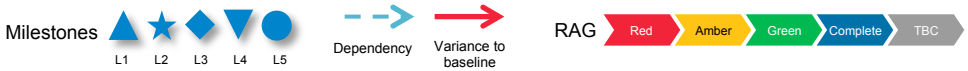
Variance to baseline

RAG Red Amber Green Complete TBC

Project Timeline (Project 1.3)



Project Timeline (Project 1.4)



Project Timeline (Project 1.1)

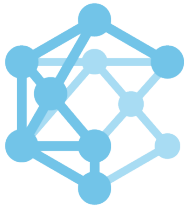
Milestones L1 L2 L3 L4 L5 | Dependency | Variance to baseline | RAG: Red, Amber, Green, Complete, TBC | Report Date

Plan Activity Exceptions (Red/Amber)

ProjectTitle	Workstream	Ref	Activity	Start	Finish	Status	Comment	Owner
Project 1.1	1-Account Management	1.02	Obtain details of all customer accounts, segmentation processes, KPIs and sales channels	10-09-16	14-09-16			George
	2-Bids	2.01	Obtain bid management processes for both businesses	08-09-16	08-09-16			
		2.03	Sign off bid processes for New Co.	28-09-16	14-10-16			Ronnie
	3-Field Sales	3.04	Brief sales team regarding selling techniques and guidelines	03-10-16	03-10-16			Joe
		3.03	Define and Agree selling techniques and guidelines timetable and inputs for New Co.	24-08-16	15-09-16			Topper
		3	Field Sales	31-05-16	14-06-16			Paul S
	4-Sales Agents	4.01	Decide if New Co. will use sales agents	02-10-16	03-10-16			Joe
	5-Billing	5.01	Receive notification from Fiance / IT confirming any changes to billing systems for Day 1	03-10-16	13-10-16			Paul
Project 1.2	1-Account Management	1.04	Agree the impact of the enlarged group on the average Balance Sheet spreads and margins	06-09-16	06-09-16			
		1.01	Define and agree process as to how to treat funding limits and assets in the balance sheet from Day 1	18-08-16	08-09-16			John
	2-Bids	2.03	List all major expenditure currently agreed to / in progress	14-09-16	04-10-16			Mick
	3-Field Sales	3.02	Decide how creditor accounts are to be merged	26-08-16	20-09-16			Mick J
	4-Sales Agents	4.02	Determine and agree if any changes to audit committee reports will be required from Day 1	17-09-16	30-09-16			Paul S
		4.03	Ensure that information for proposed changes can be obtained	22-09-16	17-10-16			George
		4.01	Obtain and Evaluate copies of audit committee reports and management letters and compile action list	09-09-16	14-09-16			Paul
Project 1.3	1-Account Management	1.02	Identify all outsourced HR services in both businesses and evaluate the implications of the deal on these services.	17-07-16	19-07-16			Jimmy

Plan Activity Exceptions (Red/Amber)

ProjectTitle	Workstream	Ref	Activity	Start	Finish	Status	Comment	Owner
Project 1.3	3-Field Sales	3.05	Obtain list of all current industrial tribunal / disciplinary matters identified as part of due diligence.	26-07-16	11-08-16			Joe
		3.03	Define position on any national/local trade union and staff representation agreements	02-08-16	25-08-16			Bill
		3.06	Evaluate and consider the position of all labour contracts currently under negotiation.	07-08-16	19-08-16			Charlie
		3.04	Define engagement strategy for Unions and employee forums	28-07-16	03-08-16			George
	4-Sales Agents	4.01	Obtain current HRIS report formats for both businesses	30-07-16	22-08-16			Ringo
Project 1.4	1-Account Management	1.01	Agree distribution workstream sponsor	12-09-16	04-10-16			Ronnie
	2-Bids	2.05	Improvement planning process	11-10-16	02-11-16			Topper
		2.04	Based upon test results develop contingency distribution models	21-09-16	10-10-16			John
		2.03	Draft new distribution model for New Co. based on best practices	26-09-16	26-09-16			Charlie
		2.01	Review all ongoing distribution projects	21-09-16	14-10-16			John Paul
	3-Field Sales	3.02	Obtain sign off to close warehouses that are no longer required	01-10-16	07-10-16			Paul
		3.03	Implement any changes to warehouse fixtures and fittings	04-10-16	20-10-16			Mick
		3.01	Identify all warehouses owned by all businesses	23-06-16	27-06-16			Robert



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