

Programme Control

It's not all about the tool!

Having both worked on large **Business Change Programmes** over the last **25 years**, we will talk about how there is a **need for flexibility** in terms of Programme Governance, depending on the scope of the Programme, the type of organisation, and the nature of your Sponsors and Stakeholders.

It is **never a 'one size fits all'**, but there is always a minimum level of Programme Governance required. Successful Programmes will always have a great Team, People, and Communications, and appropriate governance. A minimum level of governance, and **'less is more'** approach to ongoing Programme Control has to be the start point for the majority!



Nick Wilson - MD



David Broom - MD



What do we mean by...



...‘Tools’ in relation to Programme Control?

- Reliance on an Enterprise PPM Software Solution to deliver successful Change Programmes

What do we mean by Enterprise PPM Software Solution?

- Approximately £100k Plus investment
- Manages all projects in an Organisation end to end
- Integrates with all other Business Systems (HR, Finance etc)

10% have an e-ppm tool-used by 10% in organisation- using 10% of functionality – do the Maths!!



Common mistakes by the majority



- **Try to develop into a Project Maturity that is a step too far (and possibly not required)**
- **Engage with the whole business to develop requirements**
- **This leads to only an e-ppm solution meeting the requirements resulting in:**
 - Investing heavily (cost and time) and not realising the benefit, using minimum functionality, and only being used by resources with advanced level Project Management skills
 - Long lead times to implement across the whole organisation that the requirement has changed by the time implementation has completed
 - The journey of gathering requirements, selecting a solution, developing the business case fails at one of the stages – back to manual processes
- **Develop 'in house' because they've already got the license!**
- **A solution that will not realistically fit the different Business Change Programmes in the organisation**

Disclaimer - Understand some Project driven industries require e-ppm solutions, but the majority don't!



David Broom

Why am I here?



- **Opportunity to pass on my views and experience of delivering major programmes over many years to my clients**
- **Frustration of working with my peers and the emphasis and time they invest on using complex tools to manage and communicate programmes of activity**
- **Share my approach and priorities when I start any new assignment**
- **Explain why the tool we decide to use is not, and should not be a major factor in delivering a successful outcome**

What are my priorities at the start of a new programme?

- **Identify and appoint the Project Managers based on their:**
 - Ability and knowledge
 - Sector experience
 - Fit with the culture and values of the client organisation
 - Fit with the nature and style of their stakeholders

- **Establish a relationship with my stakeholders and sponsor**
 - Understand their style and approach
 - Recognise their priorities
 - Establish a “contract” for delivery and deliverables

What are my priorities at the start of a new programme?

- **Develop a communication strategy based on:**
 - The organisation's style and values
 - The sponsors requirements
 - Agreeing the minimum level of communication to satisfy the above

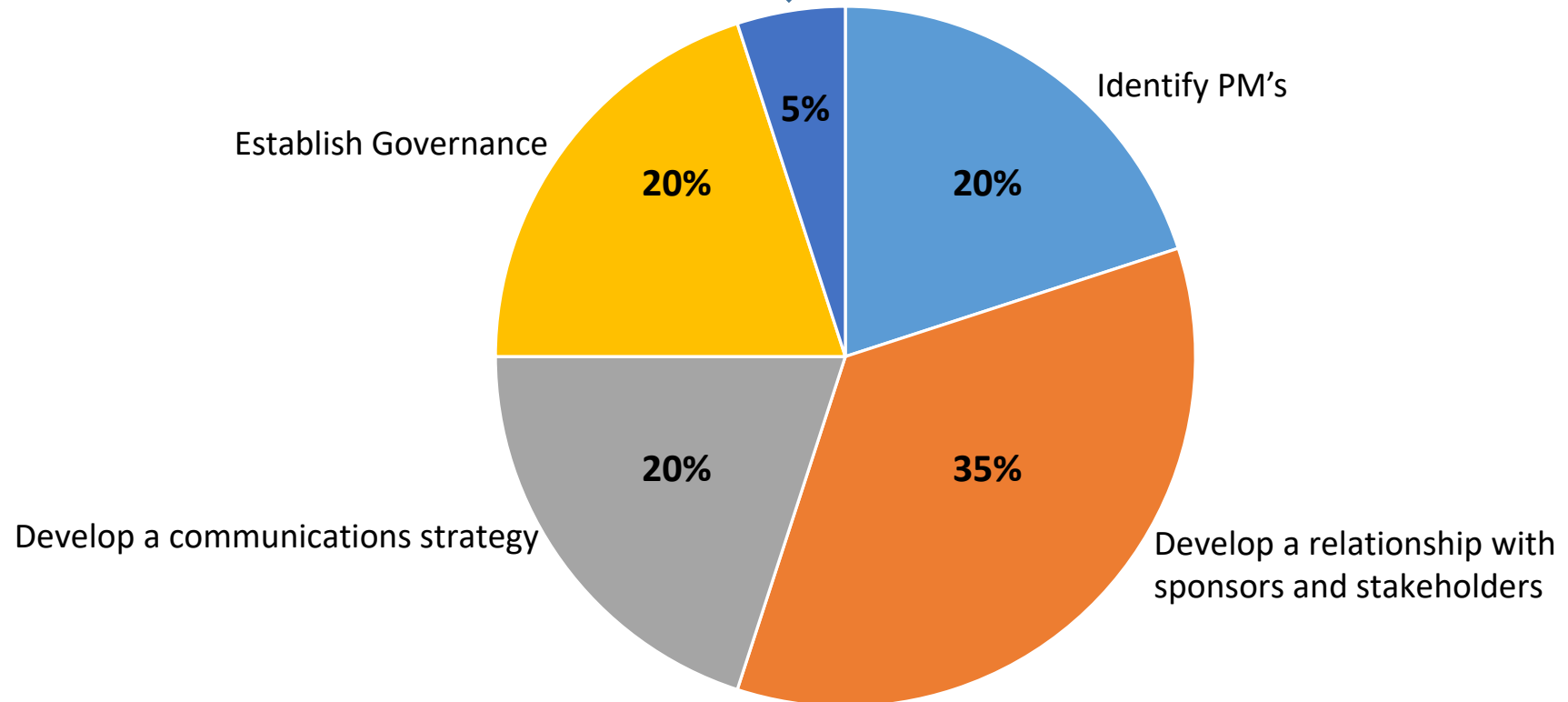
- **Establish a fit for purpose governance model based on**
 - The organisation style and values
 - The sponsors requirements
 - A realistic view of how much time is available and required to maintain control

What are my priorities at the start of a new programme?



- **Identify the tool or tools we will use to manage the programme**
 - Support the Governance model, not drive it
 - Simplify the Programme control process
 - Improve quality of Project meetings (discuss exceptions not status)
 - Demonstrate a Professional approach with Sponsors/Stakeholders

Identify, populate and brief programme management tool



My experience



- **I have to get the programme established as quickly as possible, therefore:**
 - I do not spend any time deciding which tool I should use to manage the programme
 - I do not spend any time training or briefing my project managers on how to report at programme level

- **My project managers are tasked with managing their individual projects with the necessary and appropriate rigour and attention to detail, using whatever tools they deem necessary or are comfortable using (Excel, MSP etc)**

- **I am tasked with providing a simple and consistent summary of the programme status for the sponsors**

My experience



- **One report has always been sufficient to achieve this goal, covering:**
 - Achievements and targets for next period
 - High level milestones
 - RAG status of each workstream / project
 - Red risks and issues
 - Decisions required

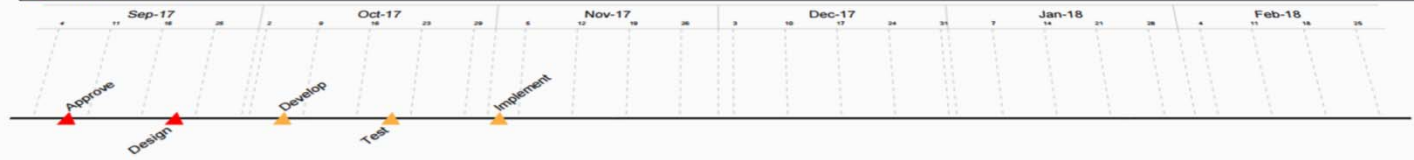
- **I have never encountered a sponsor who has had to request more detail**

Programme / Project – 1 Page Summary Report

Programme 1

Overall ■ Plan ■ Resources ■ Costs ■ Benefits ■ Issues/Risks ■

Milestones



Financials Planned Costs: £600 K Forecast Costs: £600 K Actuals: £0 K Planned Benefit: £1000 K Forecast Benefit: £1000 K

Overall

- Project off to a poor start
- Key resource still working on other project
- Original meeting to initiate cancelled
- All key milestones now affected by this slippage
- Discussions required to see if we can get back on track

Achieved Last Period

- Rearranged meeting that was delayed
- Discussions have taken place but not project not formally initiated

Focus For Next Period

- Meet with Sponsor and discuss
- Review if the re-planned dates are acceptable
- Go ahead with initiation meeting

Issues/Risks

Provide a high level summary of the main Issues and Risks

■ On track ■ Risks (Actions in place) ■ Major Risks (Escalation required)

Programme - RAG Status Report

Projects Portfolio - RAG Status

	Project Manager	Start	End	Forecast	Risk	Overall	Focus For Next Period	Decisions/Escalations
Projects Portfolio		01/05/17	13/04/18	8,600	🟡	<ul style="list-style-type: none"> General health of the Portfolio is good Some problem projects. Programme 1 has more issues than 2,3 	<ul style="list-style-type: none"> Continuing to engage team and resources Tackling challenges in Programme 1 	<ul style="list-style-type: none"> None at this level currently
Programme 1	Rory Best	18/06/17	16/03/18	3,600	🟡	This is where you write a comment about the general health of your Programme	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 1a	Gareth Davies	18/06/17	03/11/17	600	🔴	<ul style="list-style-type: none"> Project off to a poor start Key resource still working on other project Original meeting to initiate cancelled All key milestones now affected by this slippage Discussions required to see if we can get back on track 	<ul style="list-style-type: none"> Meet with sponsor and discuss Review if the re-planned dates are acceptable Go ahead with initiation meeting 	<ul style="list-style-type: none"> Requesting an Emergency Steering Group next week to discuss more resources to get project back on track Current situation that plan will be delayed with current resource and priority given
Project 1b	Joe Marler	07/06/17	22/12/17	600	🟡	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 1c	Rhys Webb	04/09/17	19/01/18	800	🟡	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 1d	Jonathan Joseph	02/10/17	16/02/18	600	🟢	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Programme 2	Sam Warburton	01/05/17	13/04/18	2,800	🟡	This is where you write a comment about the general health of your Programme	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 2a	Owen Farrell	03/07/17	17/11/17	600	🟡	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 2b	Sam Warburton	07/08/17	22/12/17	600	🟢	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 2c	Rory Best	01/11/17	13/04/18	600	🟡	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 2d	Joe Marler	06/11/17	23/03/18	600	🟢	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Programme 3	Gareth Davies	03/07/17	13/04/18	2,800	🟢	This is where you write a comment about the general health of your Programme	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 3a	Rory Best	04/09/17	19/01/18	600	🟢	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 3b	Sam Warburton	07/08/17	22/12/17	600	🟢	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 3c	Gareth Davies	03/07/17	17/11/17	600	🟡	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor
Project 3d	Rhys Webb	27/11/17	13/04/18	600	🟢	This is where you write a comment about the general health of your project	Describe any achievements - positive information	Describe support required from the Governance Steering Committee / sponsor

🟢 On track

🟡 Risks (Actions in place)

🔴 Major Risks (Escalation required)

🟡





Nick Wilson

What are we saying so far?



In the real World:

- **Majority of successful Business Change Programmes rely on great people, communications and governance**
- **Implementation of, or enforcement of a 'rich in functionality' tool will not work in most instances**
- **Engaging the best team to deliver means they need flexibility to 'do it their way', at work stream/project level**
- **There is ALWAYS a requirement for quality / timely Project Reporting, keep it simple and that's a generic requirement!**

What are we saying so far?



In the real World:

- **And if you automate that element, then:-**
 - Real time reporting
 - Reduction of manual effort
 - Better quality meetings – discuss the exceptions, not the status

- **Went live 2002 – lessons learnt from the Year 2000 Programme**

- **To meet specific requirements:-**
 - Achieve consistency, consolidation and aggregation across Business Change Programmes
 - Automation and real time reporting, reducing time spent by Project Managers and Administrators
 - Supporting the minimum level of Programme Governance, specifically in terms of reporting periodic status
 - Simple enough for all organisational departments to utilise (not just IT and the skilled Project Managers)

KISS – The Key to Engagement

Simple



Complex

Engaged

Switched OFF

Project Manager
(Skilled)

CEO

Project Manager
(Business/Subject Matter
Expert)

Programme
Manager

PMO Director

CIO

Sponsor

Project Director

PMO Manager

Sponsor

IT Director

Business Change
Director

Programme
Director

Stakeholder

KISS – The Key to Engagement

Simple



Complex

Engaged

Switched OFF

Project Manager
(Skilled)

CEO

Project Manager
(Business/Subject Matter
Expert)

Programme
Manager

PMO Director

CIO

Sponsor

Project Director

PMO Manager

Sponsor

IT Director

Business Change
Director

Programme
Director

Stakeholder

KISS – The Key to Engagement

Simple



Complex

Engaged

Switched OFF

Project Manager
(Skilled)

CEO

Project Manager
(Business/Subject Matter
Expert)

Programme
Manager

PMO Director

CIO

Sponsor

Project Director

PMO Manager

Sponsor

IT Director

Business Change
Director

Programme
Director

Stakeholder

Home Screen – Total View

The screenshot displays the 'Home - Programme 3' dashboard. At the top, there is a navigation bar with tabs for Home, Updates, Documents, Reporting (selected), Settings, Admin, and Logout. Below the navigation bar, the main content area is divided into two primary sections: 'My Projects' and 'My Reports'.

My Projects: This section lists various projects under three programmes. Each project row includes a color-coded status indicator (green, orange, or red) and a set of icons representing different metrics or actions. The 'Programme 3' section is currently selected and highlighted.

Project Name	Color	Icon 1	Icon 2	Icon 3	Icon 4	Icon 5	Icon 6	Icon 7	Icon 8
Projects Portfolio	Orange	Red	Red	Orange	Green	Red	Red	Red	Red
Programme 1	Orange	Red	Red	Orange	Green	Orange	Red	Red	Red
Project 1a	Red	Red	Green	Green	Green	Orange	Red	Red	Red
Project 1b	Orange	Green	Red	Green	Green	White	Orange	Orange	Orange
Project 1c	Orange	Green	Green	Red	Green	Green	Orange	Orange	Orange
Project 1d	Green	Green	Red	Green	Green	Green	Orange	Orange	Orange
Programme 2	Orange	Orange	Red	Green	Green	Red	Red	Orange	Orange
Project 2a	Orange	Red	Green	Green	Green	Orange	Red	Green	Green
Project 2b	Green	Green	Green	Green	Green	White	Orange	Green	Green
Project 2c	Orange	Green	Red	Green	Green	Red	Orange	Green	Green
Project 2d	Green	Green	Red	Green	Green	Green	Orange	Orange	Orange
Programme 3	Green	Orange	Red	Green	Green	Red	Red	Red	Red
Project 3a	Green	Green	Red	Green	Green	Green	Orange	Orange	Orange
Project 3b	Green	Green	Green	Green	Green	White	Orange	Green	Green
Project 3c	Orange	Red	Green	Green	Green	Orange	Red	Red	Red
Project 3d	Green	Green	Green	Green	Green	Red	Orange	Green	Green
Templates	White	Red	Red	Green	Green	Orange	Red	Red	Red
z.Recycle Bin	White	Red	Green	Green	Green	Orange	Red	Red	Red

My Reports: This section lists various reports available for the selected programme. The reports include:

- 1 Page Overview
- 1 Page Summary PPT
- 3.Reporting Pack - Milestone Summary
- Impacts - 2 Year Period
- Project Overview
- Resource - Weekly

Shared Reports: This section lists reports shared across the system:

- 1.Reporting Pack - RAG Status Summary
- 2.Reporting Pack - 1 Page Summary PPT
- 3a.Reporting Pack - Gantt Chart
- 3b.Reporting Pack - Milestone Summary
- 4.Reporting Pack - Risks RED
- 5.Reporting Pack - Issues - RED
- 6.Reporting Pack - Budgets/Actuals
- 7.Reporting Pack - Resource Usage Summary

The bottom right corner of the dashboard features a 'Help' link.

Home Screen – User Update View

The screenshot displays the 'Home - Programme 2' interface. At the top, there is a navigation bar with 'Home', 'Updates', 'Reporting', and 'Settings' tabs, and a 'Logout' button. A dropdown menu shows 'Programme 2'. Below the navigation bar, the main content area is divided into two columns. The left column, titled 'My Projects', lists three projects: 'Project 1a', 'Project 3a', and 'Project 3c'. Each project has a vertical bar on the left and a set of four colored squares (red, green, orange, red) to its right. The right column, titled 'My Reports', lists two reports: '1 Page Overview' and '1 Page Summary PPT'. Below this, a 'Shared Reports' section lists seven reports: '1.Reporting Pack - RAG Status Summary', '2.Reporting Pack - 1 Page Summary PPT', '3a.Reporting Pack - Gantt Chart', '3b.Reporting Pack - Milestone Summary', '4.Reporting Pack - Risks RED', '5.Reporting Pack - Issues - RED', '6.Reporting Pack - Budgets/Actuals', and '7.Reporting Pack - Resource Usage Summary'. A 'Help' link is located in the bottom right corner of the page.

Project	Color 1	Color 2	Color 3	Color 4
Project 1a	Red	Red	Green	Red
Project 3a	Green	Green	Green	Orange
Project 3c	Orange	Red	Green	Red

- 1 Page Overview
- 1 Page Summary PPT

- 1.Reporting Pack - RAG Status Summary
- 2.Reporting Pack - 1 Page Summary PPT
- 3a.Reporting Pack - Gantt Chart
- 3b.Reporting Pack - Milestone Summary
- 4.Reporting Pack - Risks RED
- 5.Reporting Pack - Issues - RED
- 6.Reporting Pack - Budgets/Actuals
- 7.Reporting Pack - Resource Usage Summary

What is our Key Message?



- **Aspiring to Enterprise PPM solutions may never materialise due to time and cost, and may leave you with manual solutions**

- **Quality Project Governance is fundamentally important but:-**
 - Be flexible
 - Don't over engineer
 - Get the balance right

- **Let Project Managers do what they do for managing their projects in terms of tools and systems**

- **You need a solution at Portfolio and Programme level, and the simpler the solution, the more engagement across the organisation at all Project Maturity levels, the more multiple Business Change Programmes can adapt to, more chance of the 'Big Picture' being available**

- **Tools and Systems are a small, but essential, part of the success of a Programme/Project!!**

Q&A

Further Discussion – Stand 128

If you have a requirement for a 'lite' PPM Tool, and would like to discuss further, contact Nick Wilson @ ProgrammExpress:-

Phone +44 (0)1908 586039

Email nick.wilson@programmexpress.co.uk

Website www.programmexpress.co.uk



If you have a requirement for IT/Business Change Strategy Consultancy and would like to discuss further, contact David Broom @ Retail Fix:-

Phone +44 (0)1582 222588

Email david.broom@retailfix.co.uk