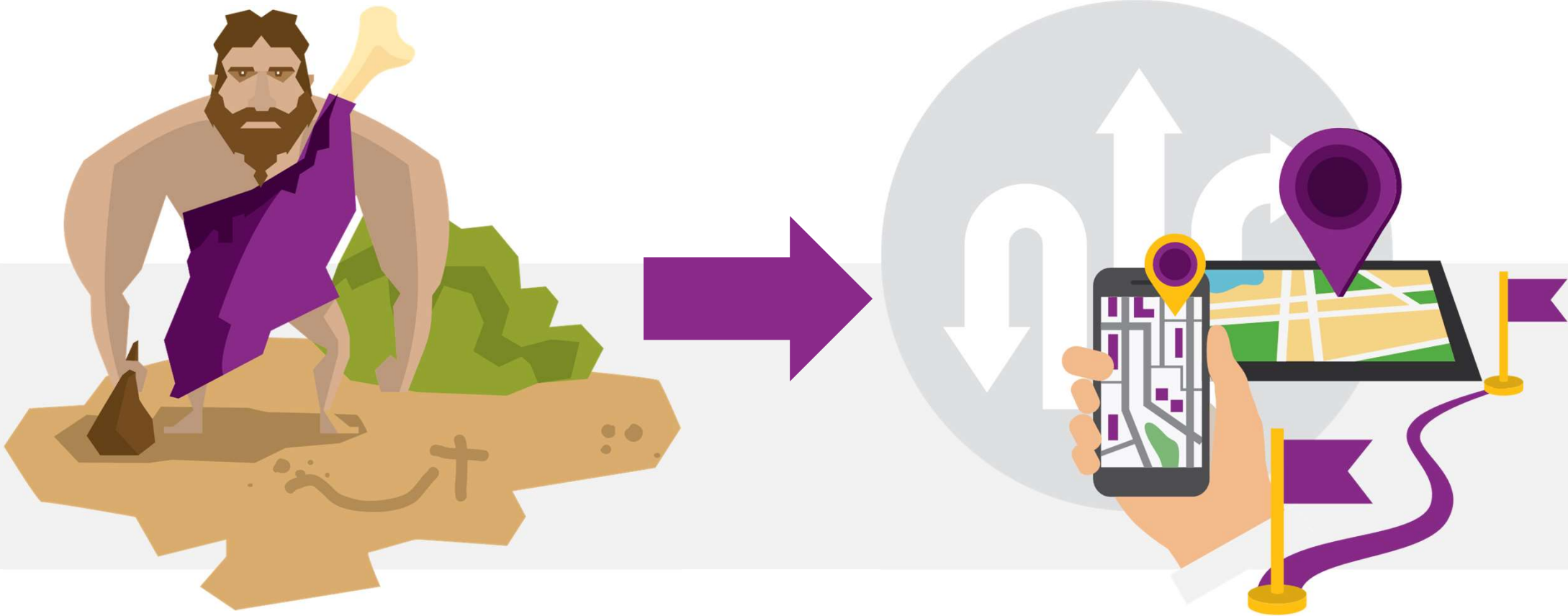


How to implement PPM Technology to Improve Your Organisational Maturity

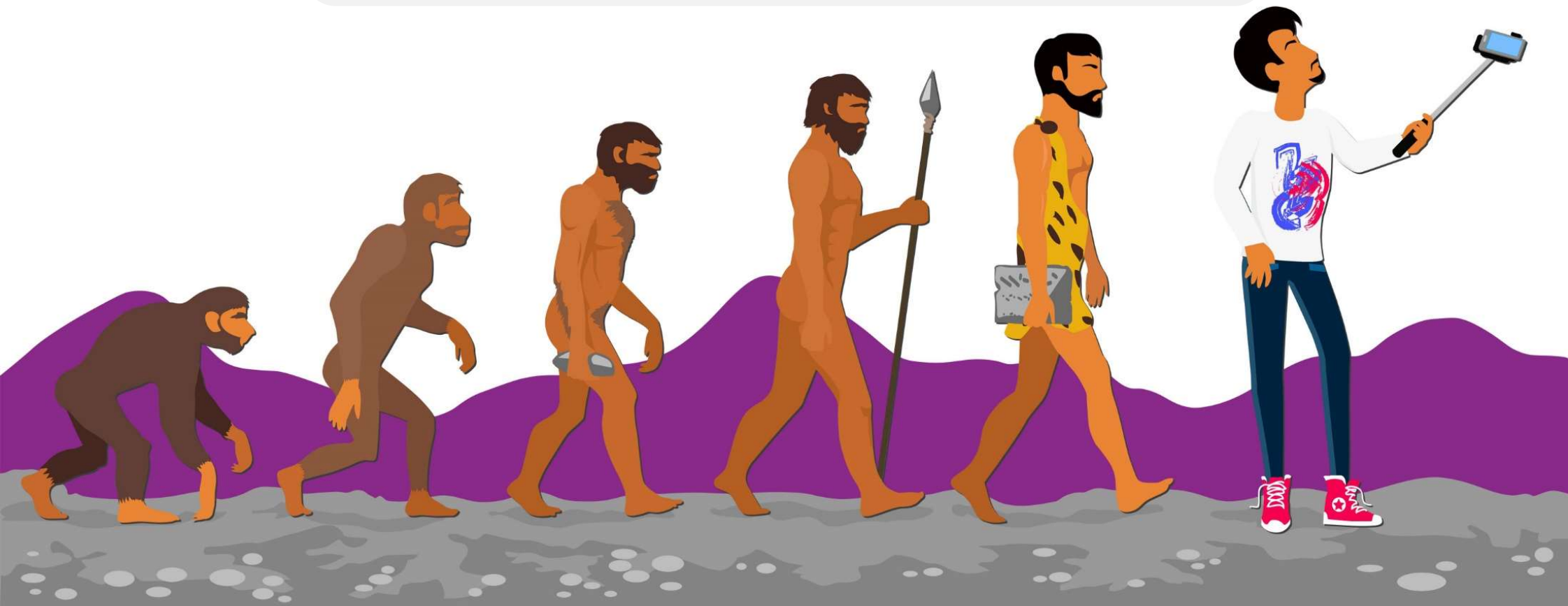


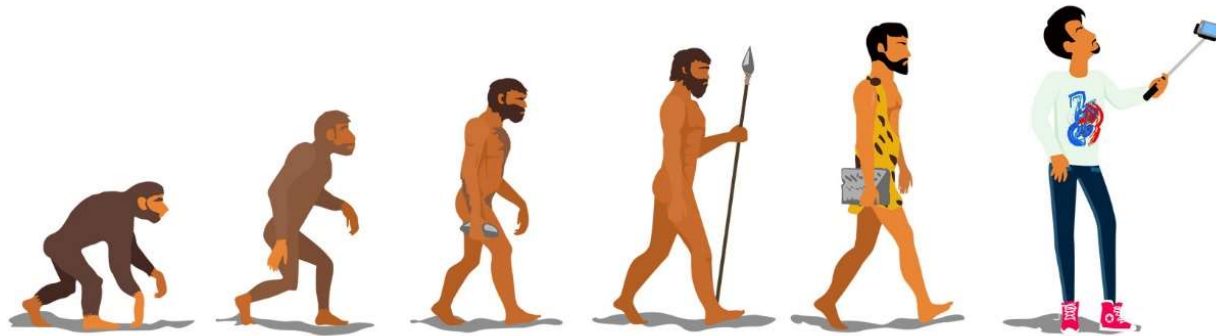
Guy Jelley, CEO,
Project Portfolio Office

Let technology guide your journey...

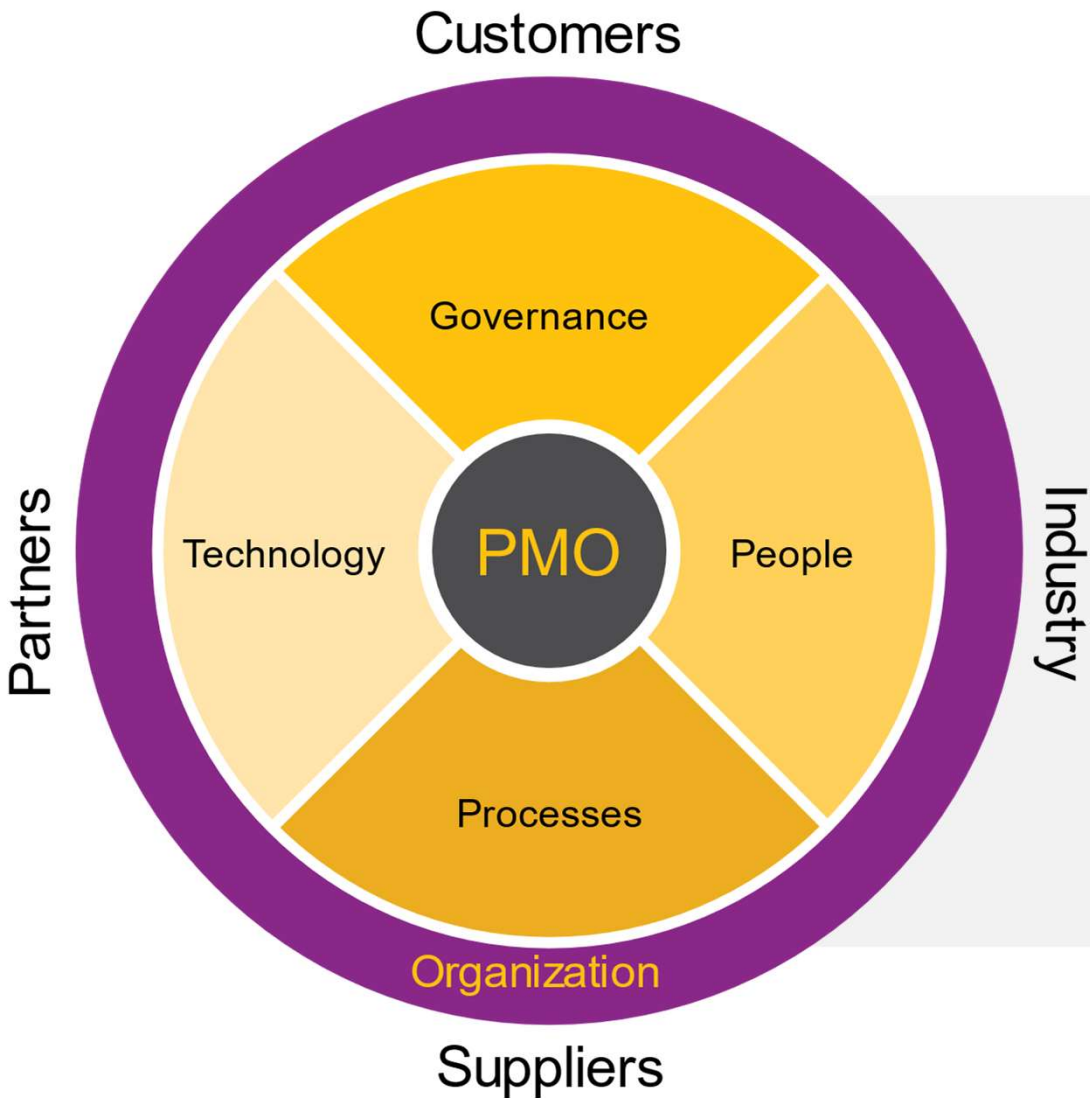


What is Maturity?





Project management maturity refers to the progressive development of an enterprise-wide project management approach, methodology, strategy, and decision-making process .



Maturity in the Organisational Context

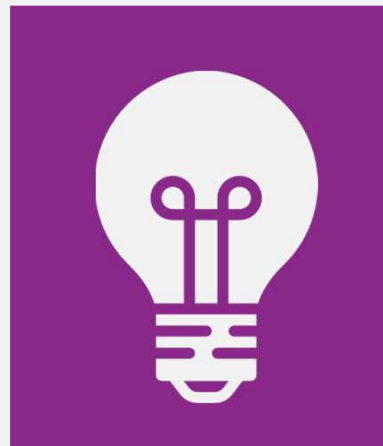
Should we care about project maturity?



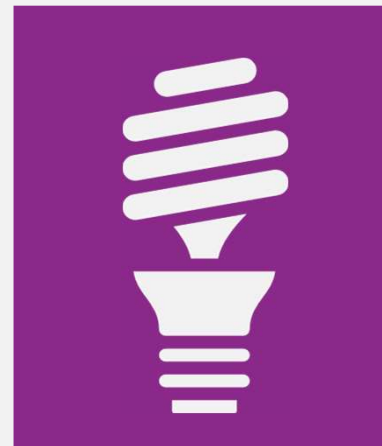
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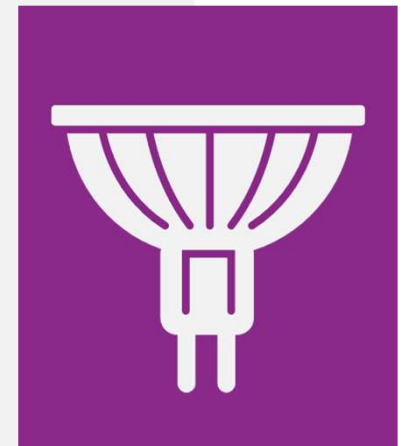
REPEATABLE



DEFINED

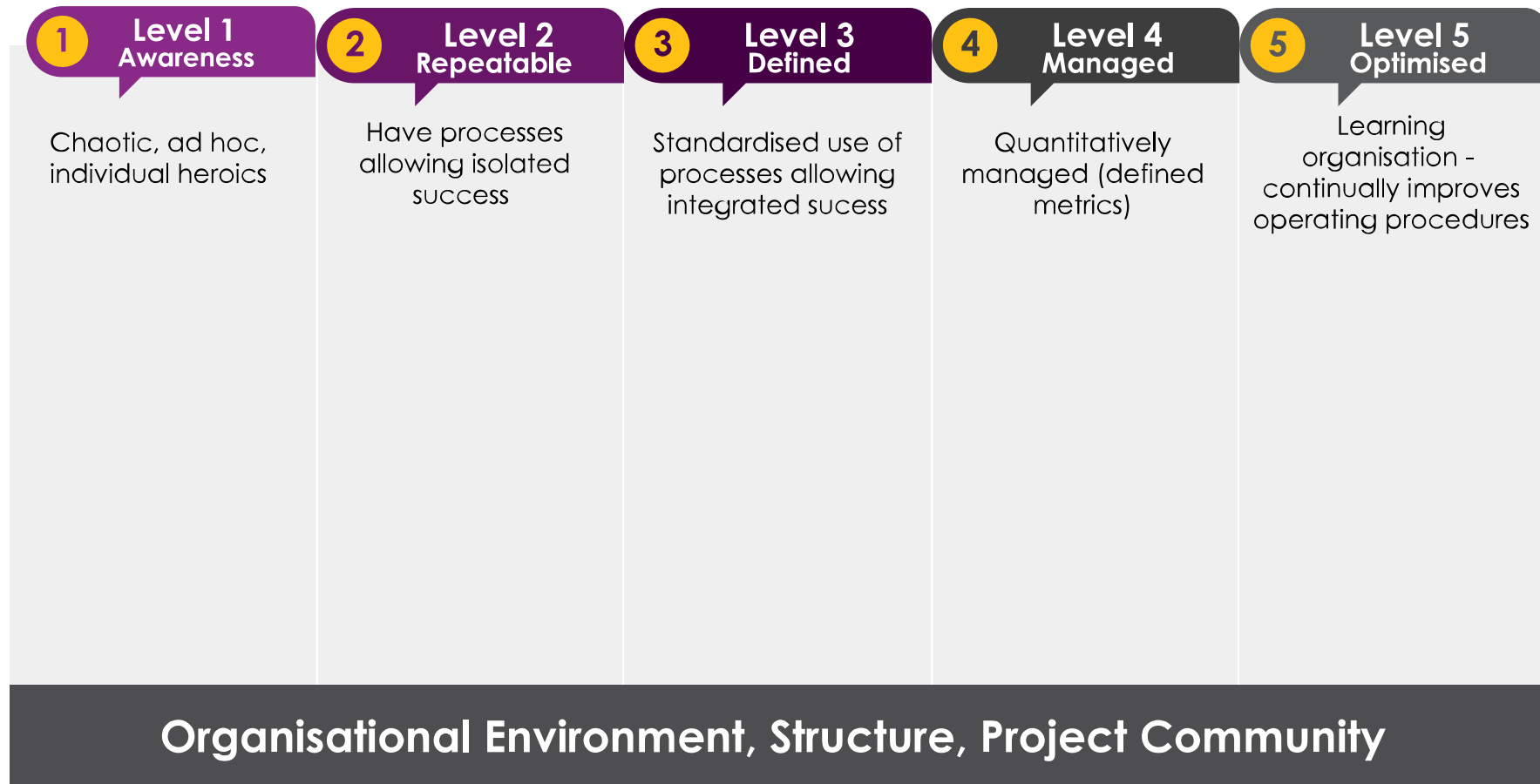


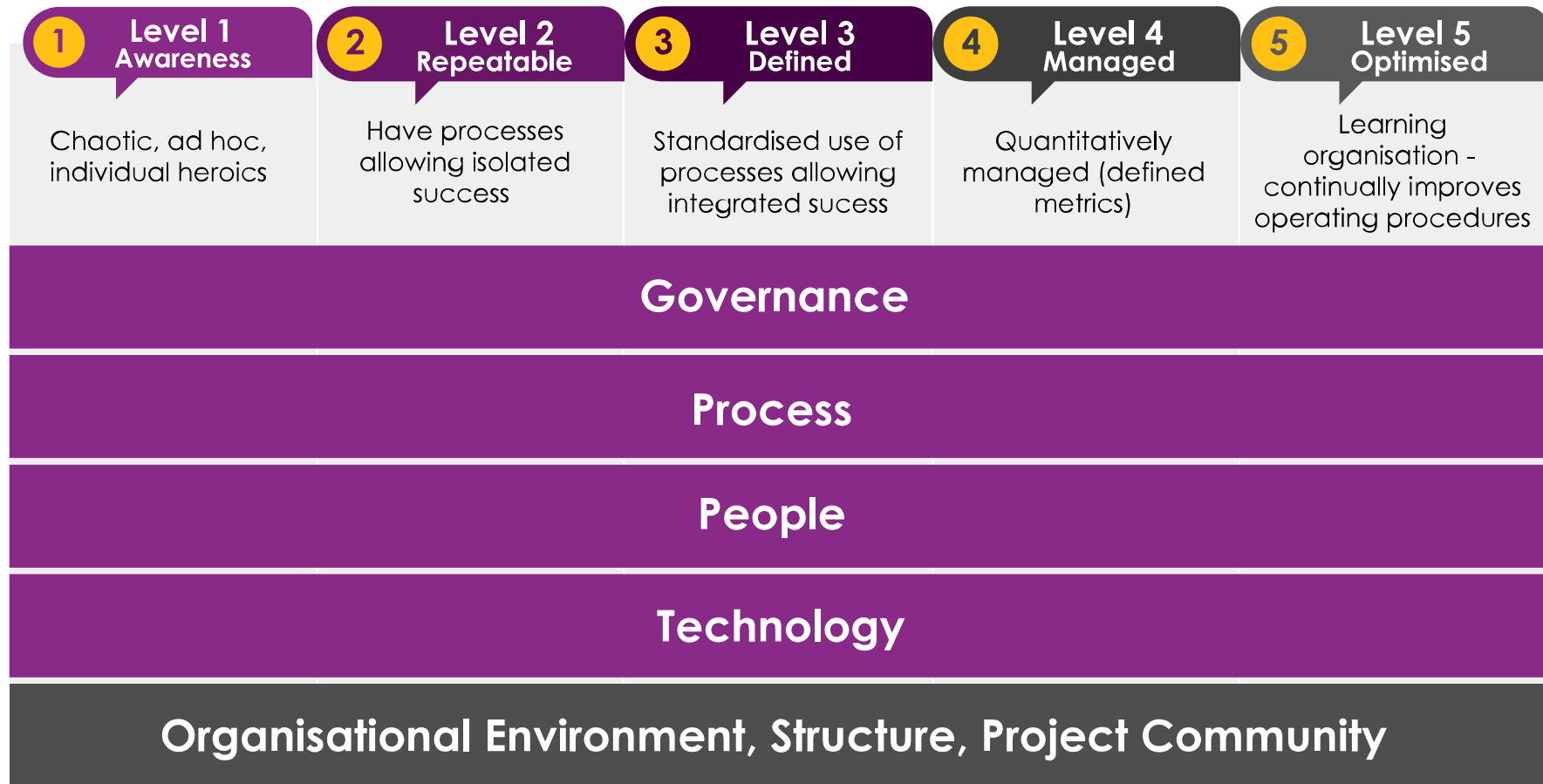
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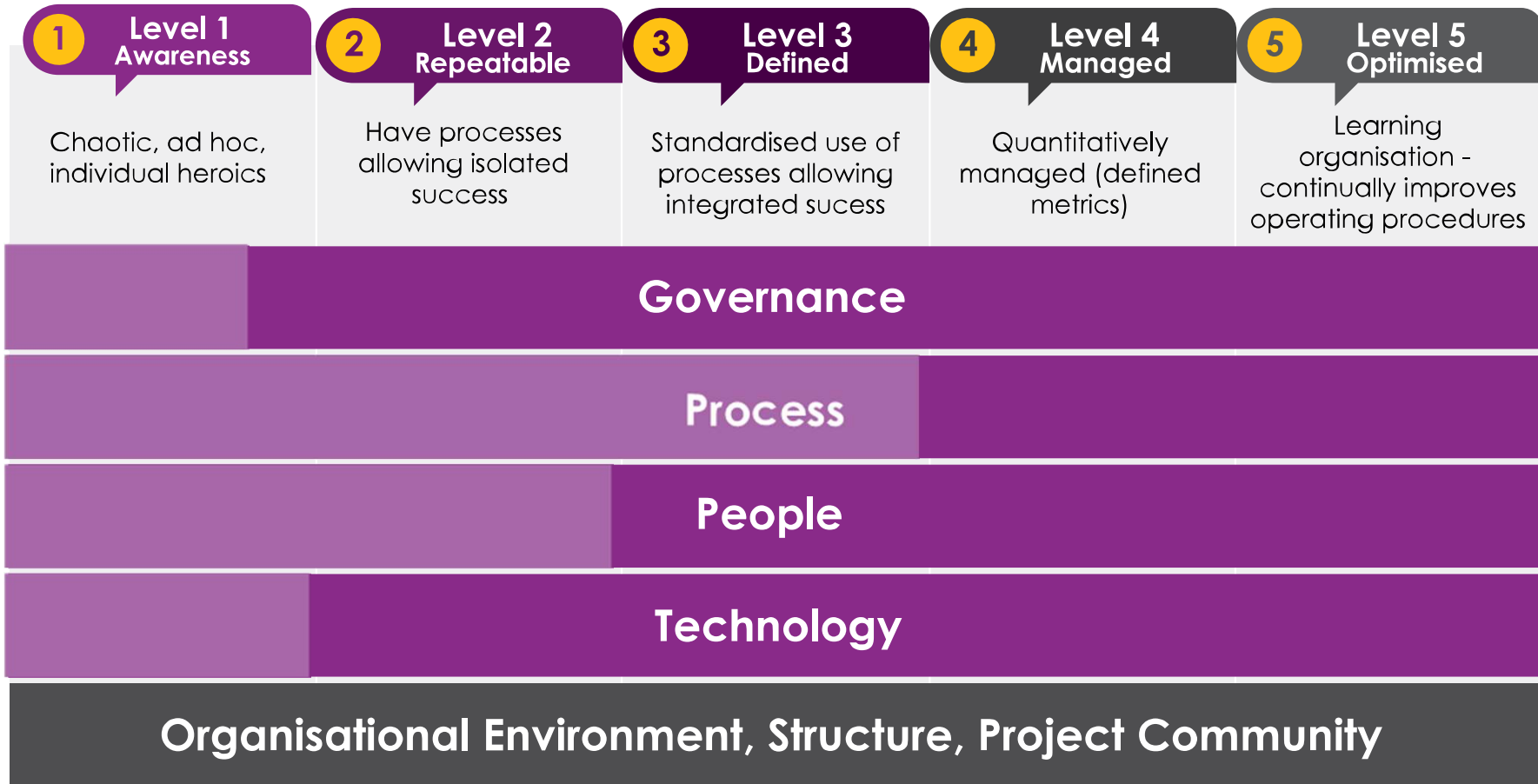


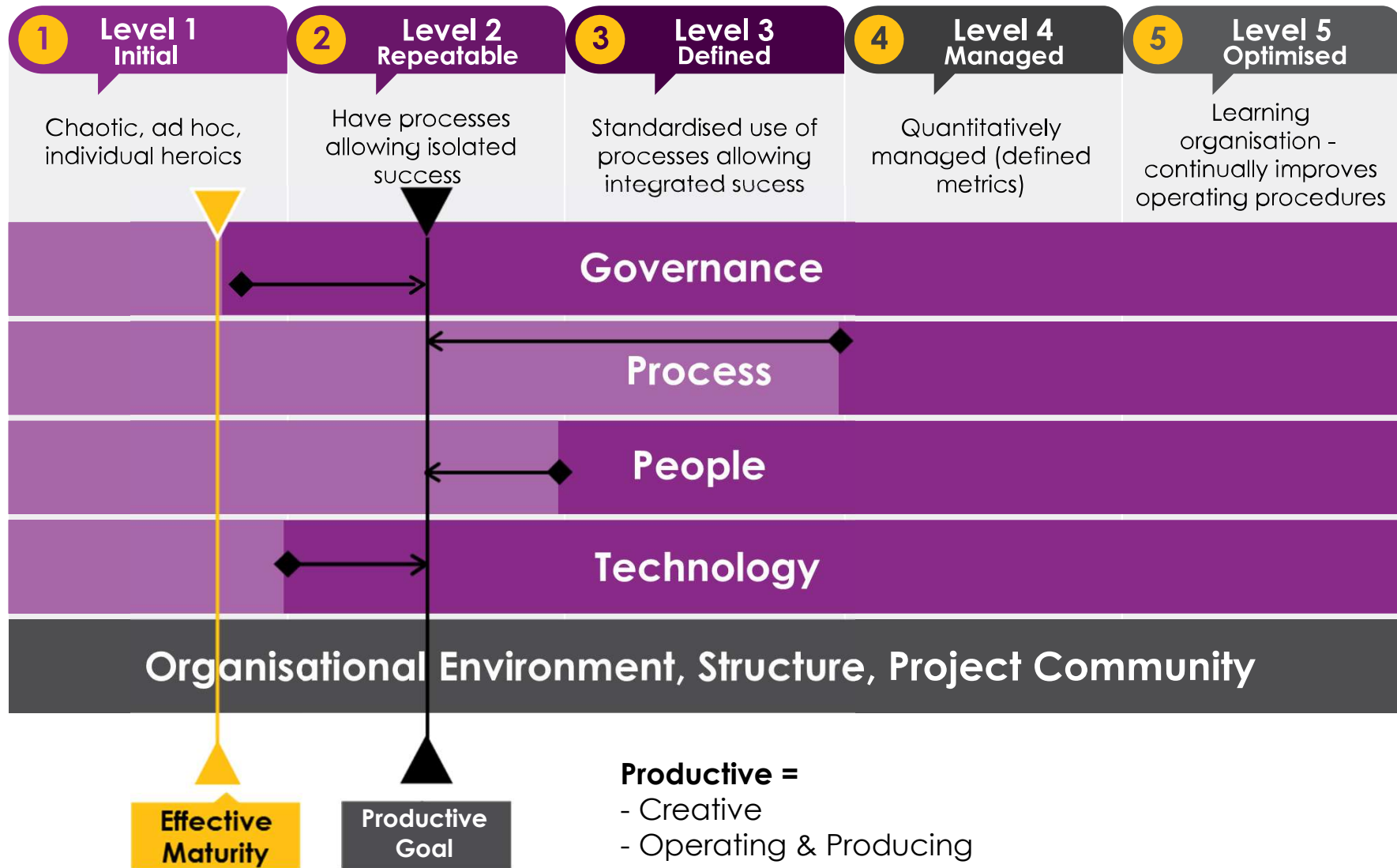
OPTIMISED

Understanding maturity levels in the organisational context









Maturity Models

Maturity Level



Project



Programme



Portfolio

Level 1: Awareness of Process

Does the organisation **recognise projects** and **run them differently** from its **ongoing business**? (Projects may be run informally with no standard process or tracking system.)

Does the organisation recognise **programmes** and **run them differently** from **projects**? (Programmes may be run informally with no standard process or tracking system.)

Does the organisation's **board recognise programmes and projects** and **run an informal list of its investments** in programmes and projects? (There may be no formal tracking and documenting process.)

Level 2: Repeatable Process

Does the organisation ensure that **each project** is run with its **own processes and procedures** to a **minimum specified standard**? (There may be limited consistency or coordination between projects.)

Does the organisation ensure that each **programme** is run with its **own processes and procedures** to a **minimum specified standard**? (There may be limited consistency or coordination between programmes.)

Does the organisation ensure that **each programme and/or project** in its **various portfolios** is **run with its own processes and procedures to a minimum specified standard**? (There may be limited consistency or coordination between portfolios.)

Level 3: Defined Process

Does the organisation have its own **centrally controlled project processes** and can **individual projects flex** within these processes to **suit** the particular **project**?

Does the organisation have its own centrally controlled **programme processes** and can individual programmes flex within these processes to suit the particular programme?

Does the organisation have its own centrally controlled **portfolio processes** and can individual initiatives flex within these?

Maturity Level



Project



Programme



Portfolio

**Level 4:
Managed
Process**

Does the organisation **obtain and retain specific measurements** on its **project management performance** and **run a quality management organisation** to **better predict future performance**?

Does the organisation obtain and retain specific measurements on its **programme management** performance and run a quality management organisation to better predict future programme outcomes?

Does the organisation obtain and retain specific management metrics on its **whole portfolio of programmes and projects** as a means of predicting future performance? Does the **organisation assess its capacity** to manage programmes and projects and prioritize them accordingly?

**Level 5:
Optimised
Process**

Does the organisation run **continual process improvement** with **proactive problem** and technology management for projects in **order to improve its ability to predict performance** over time and **optimize processes**?

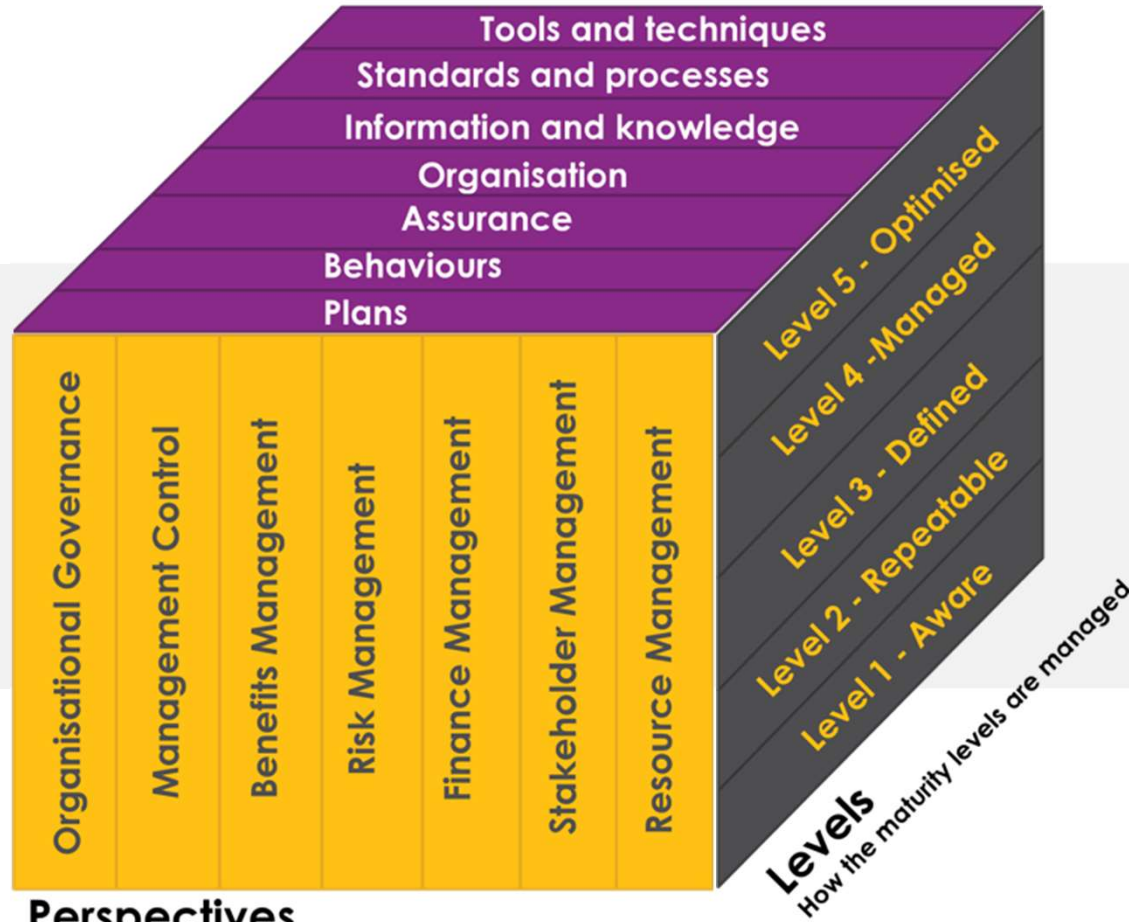
Does the organisation run continual process improvement with proactive problem and technology management for **programmes** in order to improve its ability to predict performance over time and optimize processes?

Does the organisation run continual process improvement with proactive problem and technology management for the **portfolio** in order to improve its ability to predict performance over time and optimize processes?

How to determine maturity

Threads

Common assessment areas across each perspective



Perspectives

The major process grouping within P3M3



Understand your business strategy and drivers, the PMO model, mandate, functions and services provided. **Define** the scope of the assessment.

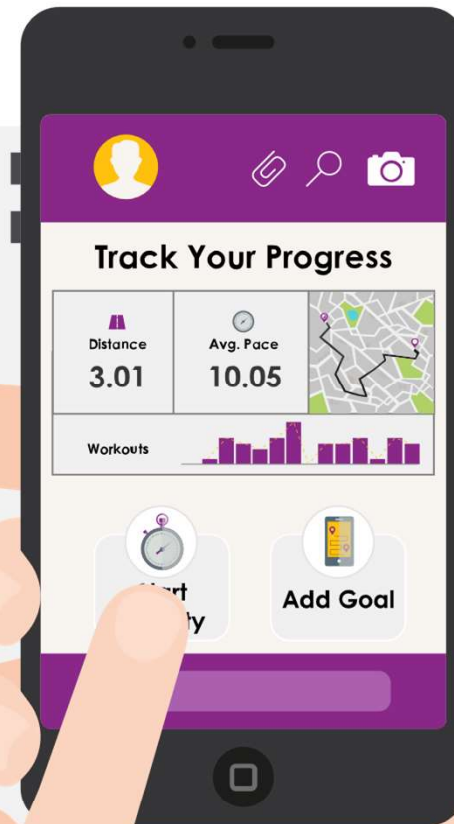
Plan the assessment based on a sound understanding of the organisation's objectives. Identify the documents and systems to review, select interviewees. Communicate to key stakeholders.

Perform the assessment of the PPM framework, standards and techniques. Assess PPM initiatives and conduct interviews to investigate and validate findings.

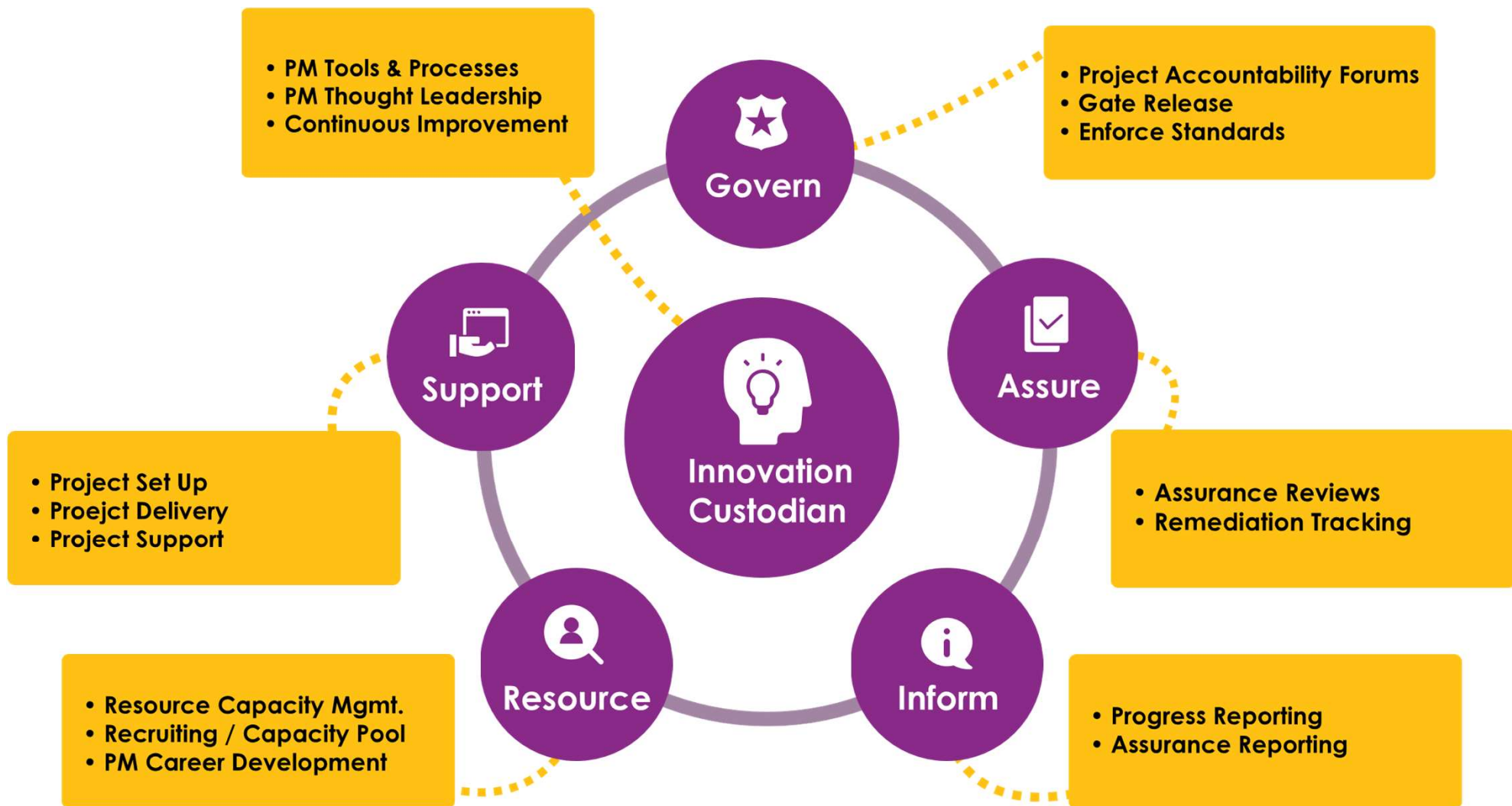
Capture the **outcomes** of the assessment in the assessment tool. Analyse findings and document initial observations. Conduct initial client feedback session.

Develop the **final report** with recommendations. Conduct the formal client feedback session. Assist client with development of capability improvement roadmap and plan.

**Technology
helps drive
maturity**

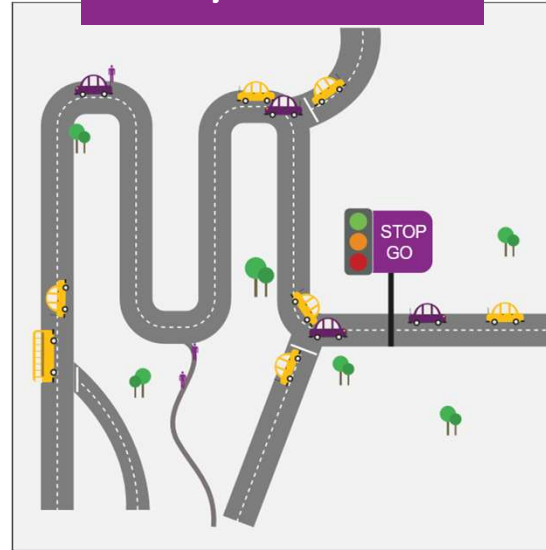


Impact of PPM technology on the role of the PMO and its services



PMO Services

Project Activation



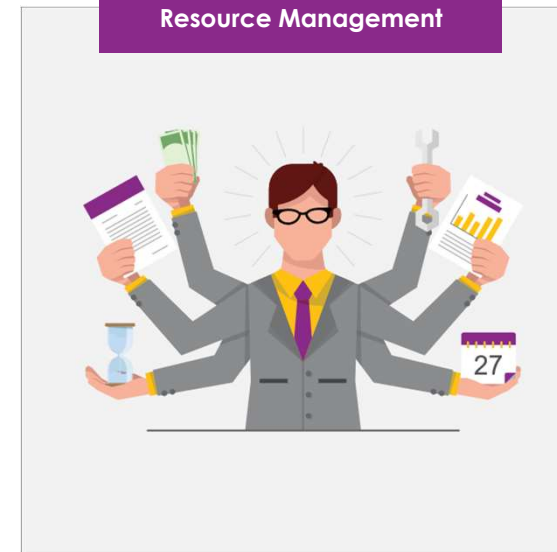
Governance



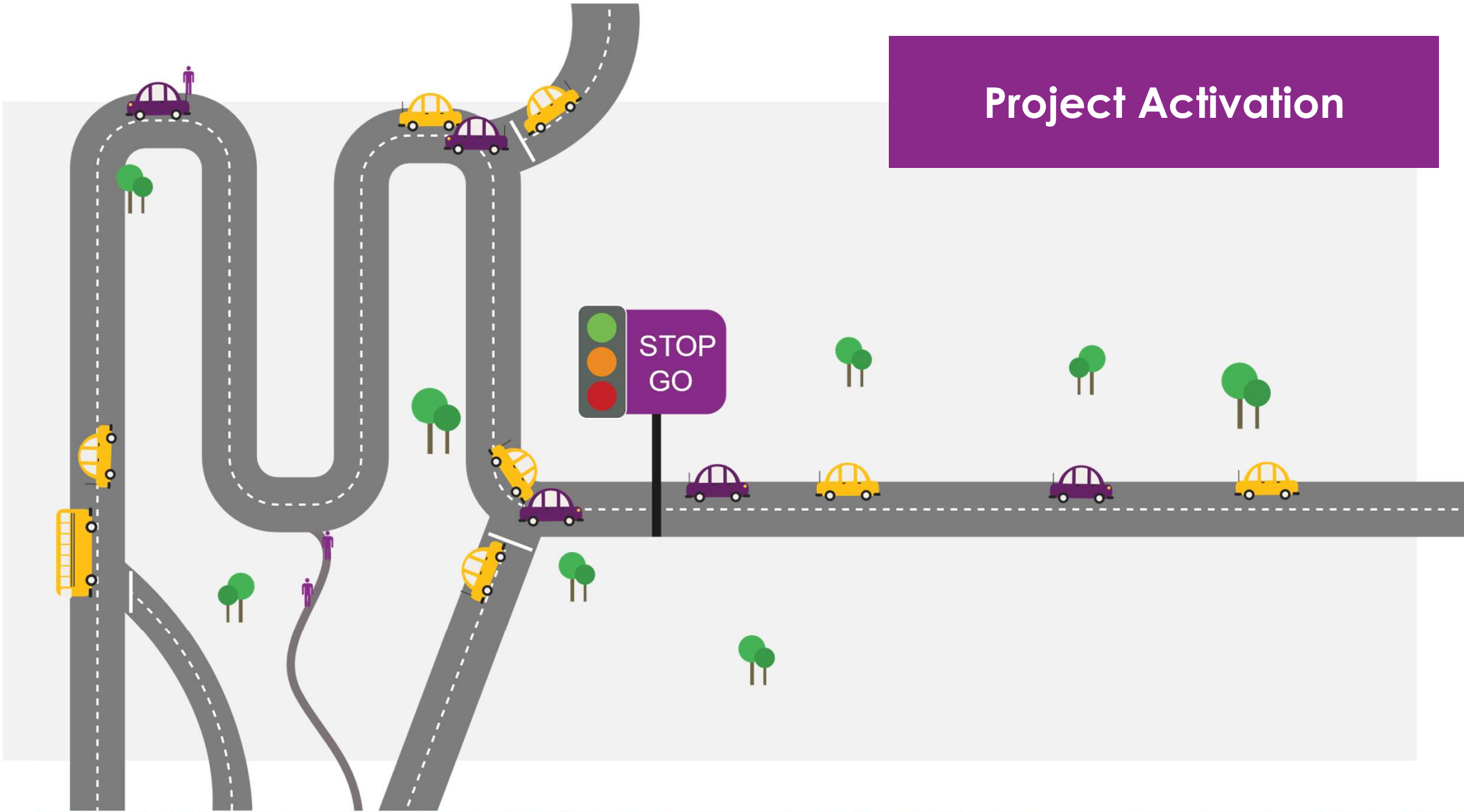
Project Status Reporting



Resource Management



Project Activation





Symptoms



Level 1

- No clear definition between projects vs. BAU
- No single place to register projects
- Project approved without formal registration
- Some initiatives run as BAU but should be projects
- Lack of effective project sponsorship early on
- A consolidated project register is not even on the radar



Level 2

- Clear distinction between projects and business initiatives
- Limited project consolidation
- Project activation process defined but not all departments using it
- Basic prioritisation of projects and programmes
- Some strategic alignment of the portfolio
- Less projects activated without the knowledge of the PMO



Level 3

- Activation of projects is aligned to the portfolio
- Single entry point for the activation of projects
- Projects cancelled / put on hold in favour of new projects more aligned to strategy
- Accurate, consolidated project list accessible and available to the entire organisation
- Effective sponsor / executive support



What To Do



Level 1

- Develop a **definition** for what a **project** is and most importantly isn't
- Create a **consolidated project list**
- Define the **project approval process**



Level 2

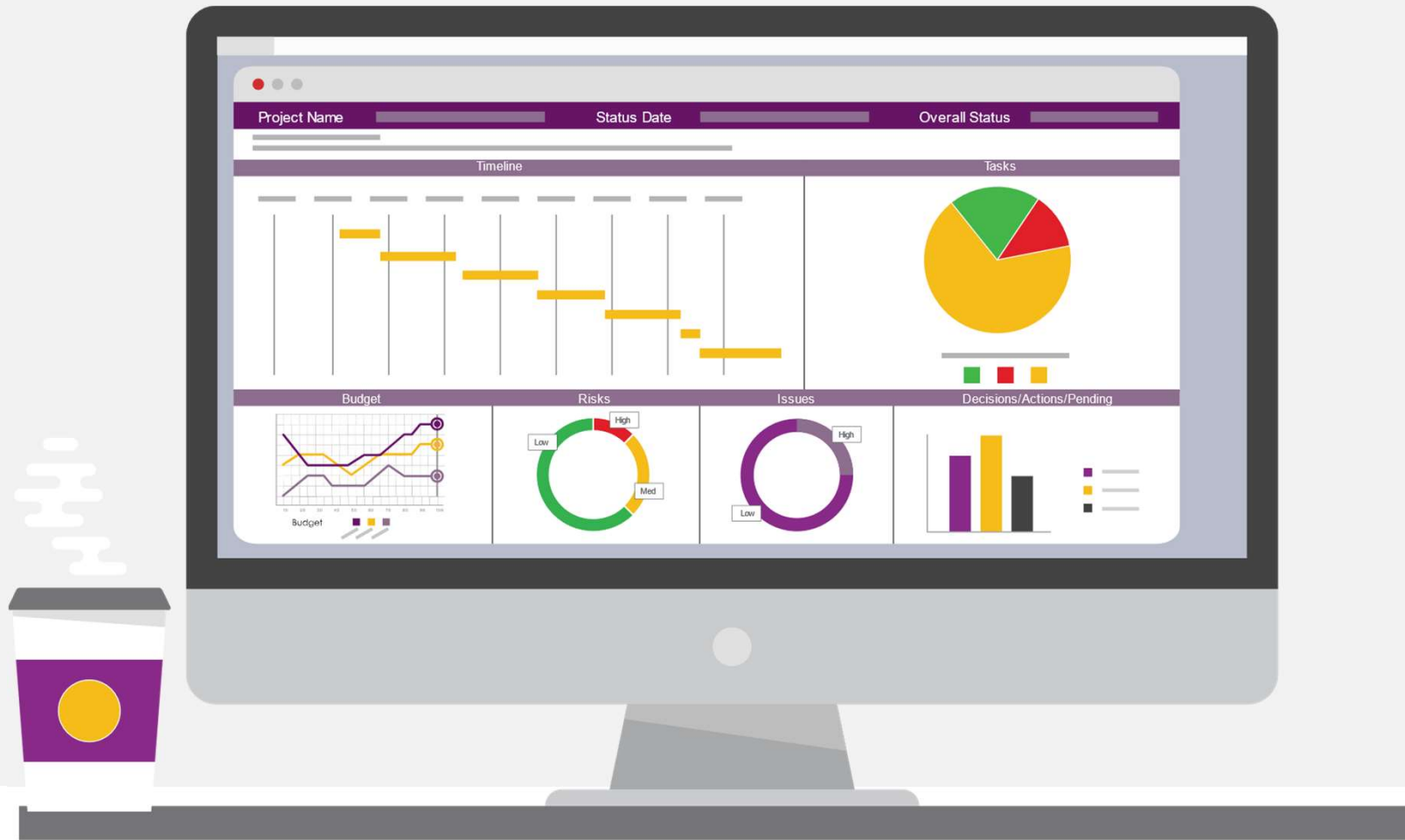
- Build a **single entry point to register** all projects
- Define a **simple project categorisation model**
- Constitute a **portfolio review committee**



Level 3

- Include **strategic contribution** on project the project request form
- Introduce the **recording of quantifiable business benefits** as part of project registration

Project Status Reporting







Symptoms



Level 1

- Impossible to obtain clear indicators of the state of each project
- No templates, guidelines to produce status reports
- Status reporting in the form of chats at the water cooler



Level 2

- Inconsistent use of templates, inconsistent frequency
- Status means something different for each person
- Isolated areas of the business producing status reports



Level 3

- Can monitor the status of each project
- Standardisation of RAG indicators
- Status reporting is less data and more information



What To Do



Level 1

- Formalise status reporting
- Standardise the reporting heartbeat
- Develop a project status report template



Level 2



Level 3

<Insert LOGO>

Report Date: 08 November 2016

<Project Name>			
Project Information		Project Stakeholders	
Code:	0000	Portfolio/Type:	Grow the Business
Status:	Active	Department:	IT
Phase:	Planning	Project Sponsor:	Harry Adams
Priority:	1	Project Owner:	Barry Linekar
Project Health:	AMBER	Project Manager:	Ravi Naidoo

Project Comments
General Comments & Issues
 This project is currently in initiation and the charter is almost complete. Some detailed planning sessions have begun and thus the scope and PMP is also work in progress.
Milestones & Deliverables Achieved this Period
 Project initiation began and some workshops around planning and scope are underway.
Milestones & Deliverables Planned for this Period
 - Approval of the Project Charter
 - Approval of the Project Management Plan (and planning)
 - Move into Execution Phase
Decisions Required from Stakeholders
 The stakeholders must approve the project charter followed by the project management plan.
 The stakeholders must provide feedback on the benefits listed in the business case based on the new organization structure.

Health Indicators			
Title	Current RAG	Previous RAG	Comments
Progress	A	R	Project on track and currently in initiation.
Costs	G	A	Provisional budget loaded yet detailed planning will determine and baseline budget.
Risks	G	G	Risks have been identified during initiation and are being addressed.
Scope	A	R	Project still in initiation and thus scope yet to be determined.
Issues	G	A	Only two issues currently and neither are show stoppers.

Project Tasks							
Title	Responsibility	Planned Start Date	Actual Start Date	Planned End Date	Planned Progress	Actual Progress	Variance
Business Architecture Blueprint		2016-10-20	2016-10-20	2017-01-25	10%	7%	(3%)
Project Management		2016-10-20	2016-20-10	2016-10-29	100%	35%	(65%)
Project Management Plan	Mary Eksteen	2016-10-29		2016-10-29	100%	0%	(100%)
Complete Execution		2016-10-30		2017-01-15	0%	0%	0%

Project Costs							
Category	Budget	Actual/Spent	% Spent	Estimate to Complete	Total at Completion	Variance	% Variance
CAPEX	R 203 000	R 26 000	13 %	R 177 000	R 203 000	R 0	0%
Grand Total	R 203 000	R 26 000	13%	R 177 000	R 203 000	R 0	0%

Project Risks								
Risk No	Title	Description	RAG	Type	Risk Owner	Follow-Up Date	Age	Days Overdue
0002	Poor Staff Involvement	When processes...	R	Quality	Mary Eksteen	2016-11-04	2	(3)

Project Issues							
Issue No	Title	Description	Priority	Issue Owner	Follow-Up Date	Age	Days Overdue
0005	Process Flow Stoppage	The flow from operations to HR...	Low	Manny Sanchez	2016-12-15	2	0

Scope Changes							
Scope Change No	Name	Description	Impact on Cost	Approval Status	Requested By	Impact on Time(Days)	Implemented
0010	Report Inclusions	A request to include 2...	5 000	Pending	Mary Eksteen	21	No

Project Status Report Template



Level 1

- Formalise status reporting
- Standardise the reporting heartbeat
- Develop a project status report template

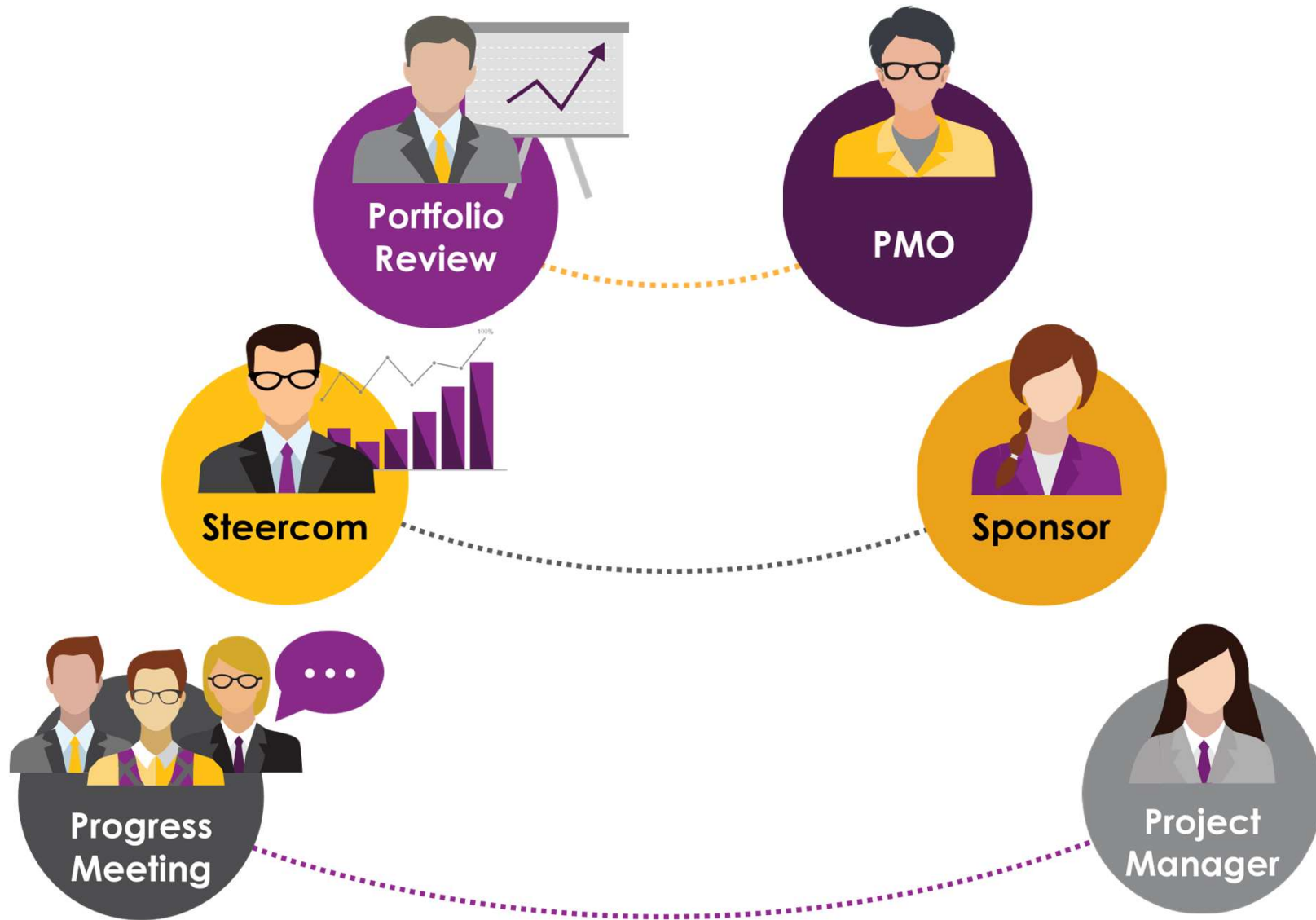


Level 2

- Tailor templates based on audience



Level 3





Level 1

- Formalise status reporting
- Standardise the reporting heartbeat
- Develop a project status report template






Level 2

- Tailor templates based on audience
- Apply a standard for how to report on project status



Level 3



Indicator	RED IF 	AMBER IF 	GREEN IF 
Progress	The baseline planned end date will not be achieved or the negative variance on the project will not be resolved.	A negative schedule variance exists or the baseline planned end date is at risk but the team has identified and are implementing mitigating actions that have a high chance of succeeding in bringing the schedule variance back in line and completing the project by the baselined planned end date.	The project variance is acceptable and the project will be completed by the baselined planned end date.
Scope	The project is at severe risk due to the scope of project not being defined, documented and approved by PPO and the client or the current work / expectations are not aligned to the approved scope.	The project has a serious challenge in that the scope of the project is not defined, documented or approved by PPO and the client or the current work / expectations are not aligned to the approved scope but the team has identified and are implementing mitigating actions that have a high chance of succeeding in defining, documenting and approving the scope or aligning the current work to the currently approved scope.	The scope of the project is defined, documented and approved by PPO and the client and the current work is aligned to this scope.
Costs	The project is at risk with unplanned costs and/or hours expected to exceed the current budget.	Costs and/or hours may possibly exceed the original budget but the team has identified and is implementing mitigating actions that have a high chance of succeeding to correct this.	Cost and hours are being incurred but are not expected to exceed the current budget.



Level 1

- Formalise status reporting
- Standardise the reporting heartbeat
- Develop a project status report template



Level 2

- Tailor templates based on audience
- Apply a standard for how to report on project status
- Acknowledge only the status reports adhering to the reporting heartbeat using the defined templates



Level 3

- Gamify submission of project status reports with a project manager leader board to achieve consistency
- Provide information not data through story telling in reporting via constant review, coaching and potentially training

Governance





Symptoms



Level 1

- No formalised governance controls in place
- Poorly controlled projects
- Each project handled differently
- Little organisational support for project management



Level 2

- Limited compliance to governance in some areas
- Processes are reactive
- Use of common techniques for some project processes



Level 3

- Projects tailor project processes to organisation's needs
- Clear assignment of roles and responsibilities
- Consistent use of tools and techniques for project management processes



What To Do



Level 1

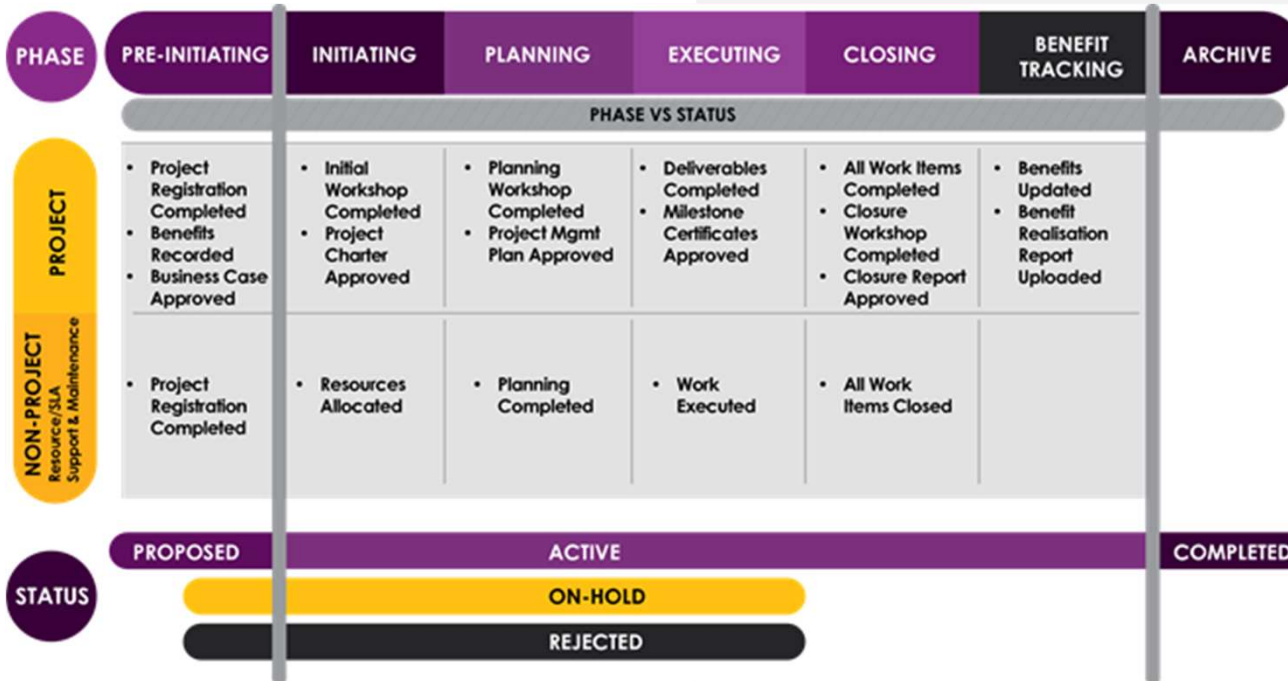
- Define governance requirements per stage or phase
- Define stage / phase vs. status



Level 2



Level 3



Governance Framework



Level 1

- Define governance requirements per stage or phase
- Define stage / phase vs. status

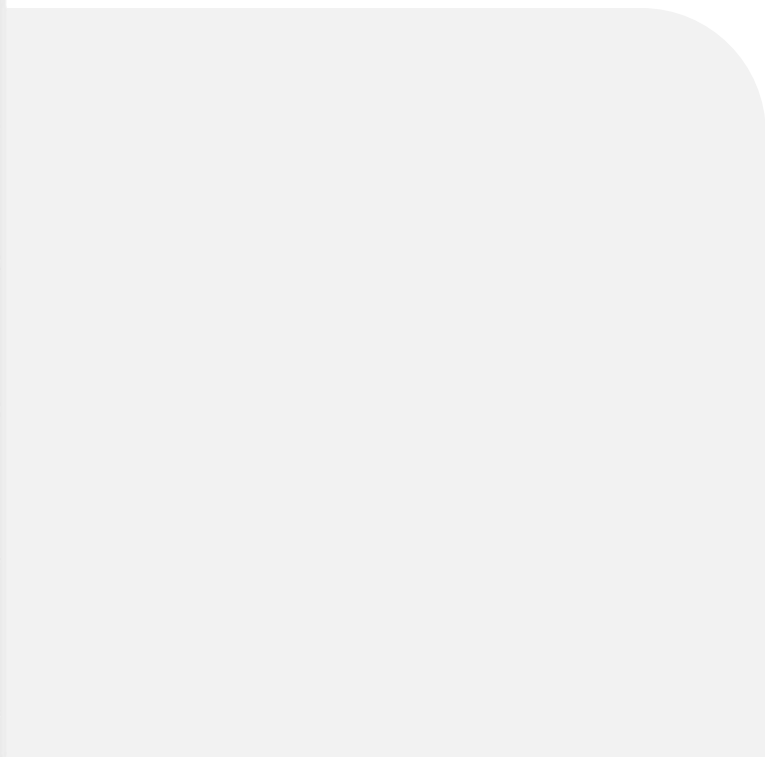
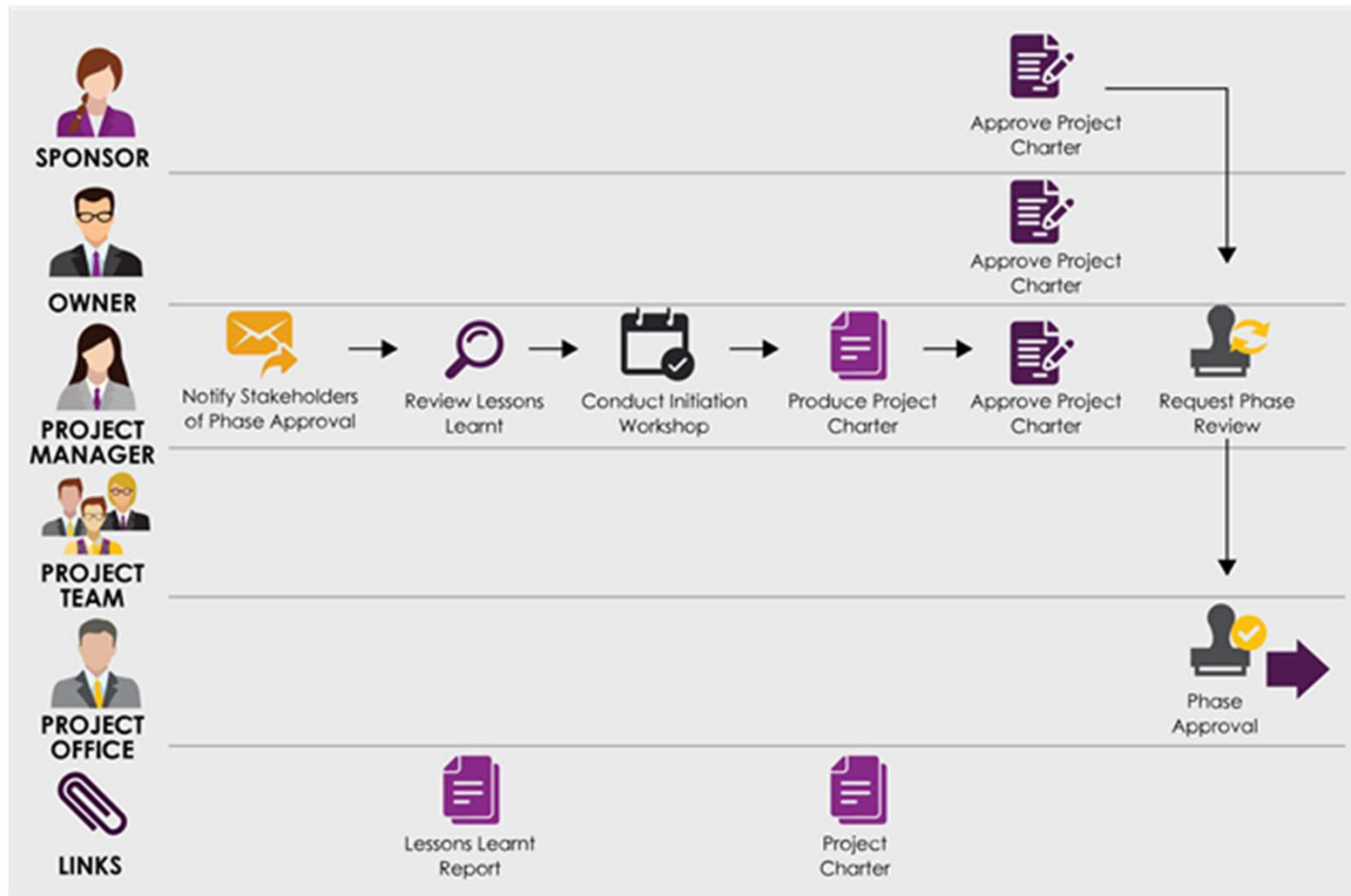


Level 2

- Make governance requirements accessible to the project community
- Audit in-flight projects to assess current governance compliance



Level 3





Level 1

- Define governance requirements per stage or phase
- Define stage / phase vs. status



Level 2

- Make governance requirements accessible to the project community
- Audit in-flight projects to assess current governance compliance



Level 3

- Customise governance requirements based on project type / size
- Publish adherence to governance statistics



Project Governance Report

Generated Date : 2018-06-12

Project Information

Code:	DEMO	Project Manager:	Eksteen, Mary
Name:	X100 Product Launch	Governance RAG:	G
Portfolio / Type:	Portfolio 2	Gate Ready RAG:	R
Status:	Active	Project View:	Link
Phase:	Executing		

Required Documents

Phase	Type	Status	Last Updated	Governance RAG
Initiating	Business Case	Approved	2018-06-11	G
Planning	Project Charter	Approved	2018-06-11	G
Executing	Project Management Plan			R
	Project Plan / Schedule	Final	2018-06-11	A
Closing	Deliverable Sign-Off			●
Benefit Tracking	Closure Report			●

Resource Management





by Project Management Institute



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Symptoms



Level 1

- Lack of understanding of current capacity
- No visibility of resource allocation to BAU vs. projects
- Little or no insight to resource demand per project
- No formal resource request process in place



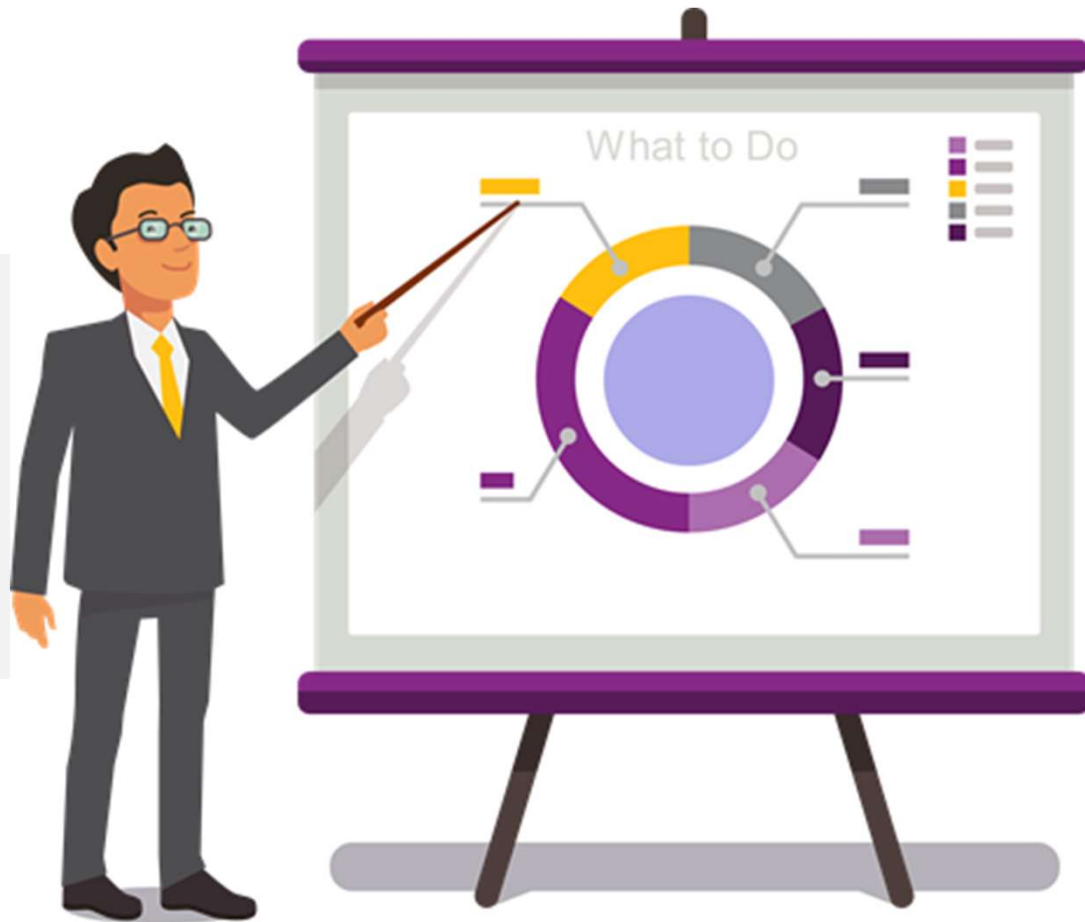
Level 2

- Limited view of the resource pool
- Some insights to allocation across BAU initiatives and projects
- Defined process to request resources
- Limited view of actual time spent on project with a few areas completing time sheets



Level 3

- View of the complete resource pool with charge out rates, skill and allocation per resource
- Comparison of demand vs. actual time spent on projects
- Optimal resource request process in place



What To Do



Level 1

- List the resources available for project work
- Amend project request process to include resource requirements



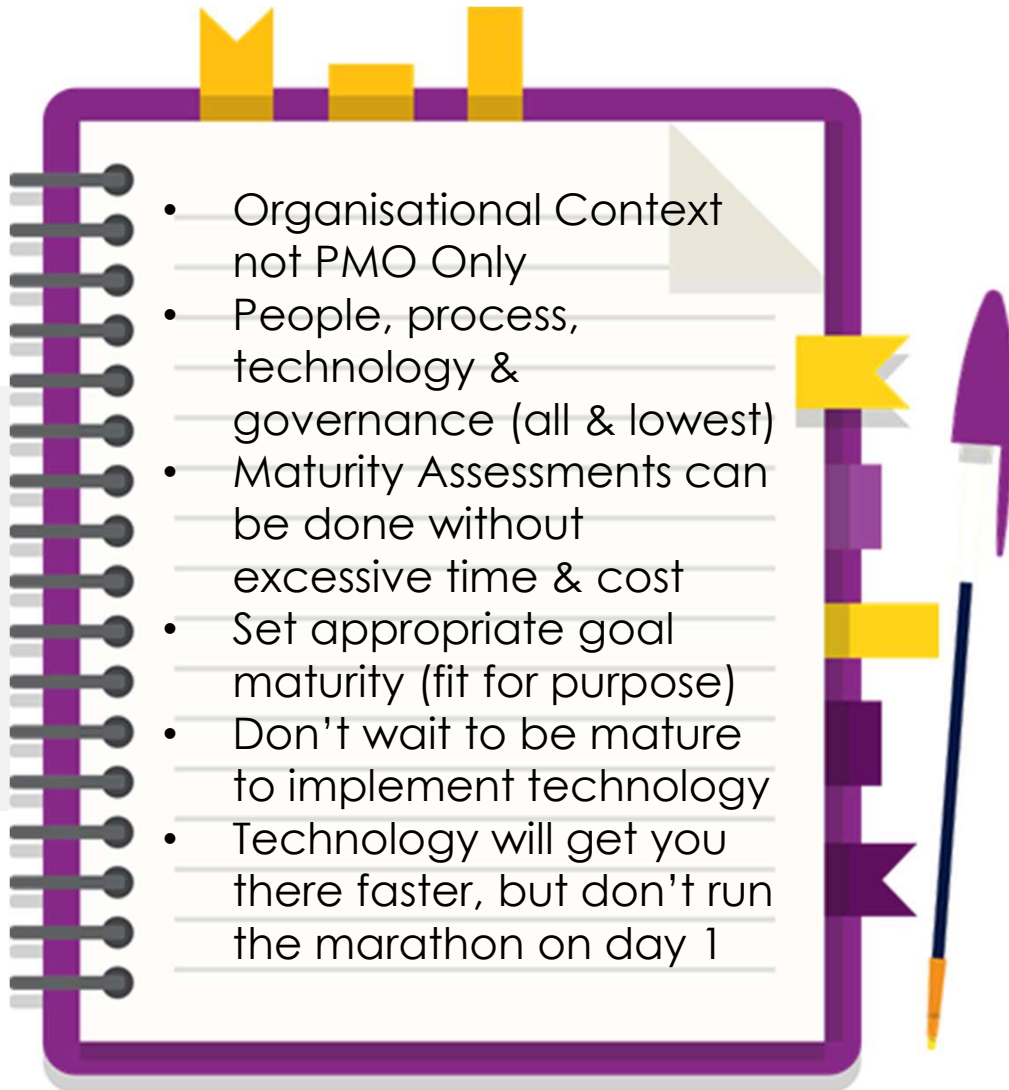
Level 2

- Update resource charge out rates, skills and allocation
- Record actual time spent on project work



Level 3

- Govern resources & proactively communicate capacity matched to the pipeline
- Prioritise resource requests based on a project's strategic value



- Organisational Context not PMO Only
- People, process, technology & governance (all & lowest)
- Maturity Assessments can be done without excessive time & cost
- Set appropriate goal maturity (fit for purpose)
- Don't wait to be mature to implement technology
- Technology will get you there faster, but don't run the marathon on day 1

Lessons Learnt

Questions



Guy Jelley

CEO - Project Portfolio Office

guy@go2pppo.com

 [@GuyJelley](https://twitter.com/GuyJelley)