



Operational Excellence in a PMO

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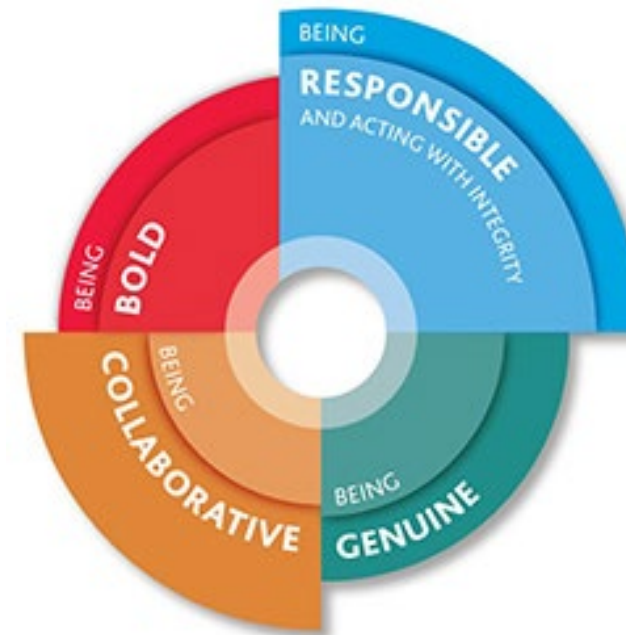


WHO ARE BDO?

- A provider of tax, audit and assurance, advisory and business outsourcing services
- Founded as Stoy & Co in 1903
- Many mergers, most recent Moore Stephens in 2019



Purpose
“Helping You Succeed”



IDEAS | PEOPLE | TRUST



PMO BACKGROUND

In Spring 2021 the Operations Board agreed we need a PMO to:

PMO OBJECTIVE

► ‘Do Less, Better’. Helping BDO deliver the ‘Right change Initiatives’, the ‘Right Way’, faster.



01
Maximise Change Investment Relevant to Our Strategy



02
Help Deliver Change Effectively and Efficiently

04
Track, Record and Report on Expectations

03
Help Build Firm Wide Change Capability

TURNING OUR VISION INTO OUTCOMES

In November 2022 We Revisited our Purpose

PMO OBJECTIVE

► Realise Strategic Value | The Right Way | Faster



01

WE ARE CONFIDENT THAT
CHANGES DELIVER OUR STRATEGY

02

WE MAKE
INSIGHTFUL DECISIONS

03

REGULAR OUTCOME FOCUSED
CHANGE IS PART OF OUR DNA

04

CHANGE DOES NOT
COME AS A SURPRISE

05

RISKS DO NOT
SLOW US DOWN

06

WE ARE READY TO
ABSORB CHANGE



IDEAS | PEOPLE | TRUST

BDO

PMO STRUCTURE



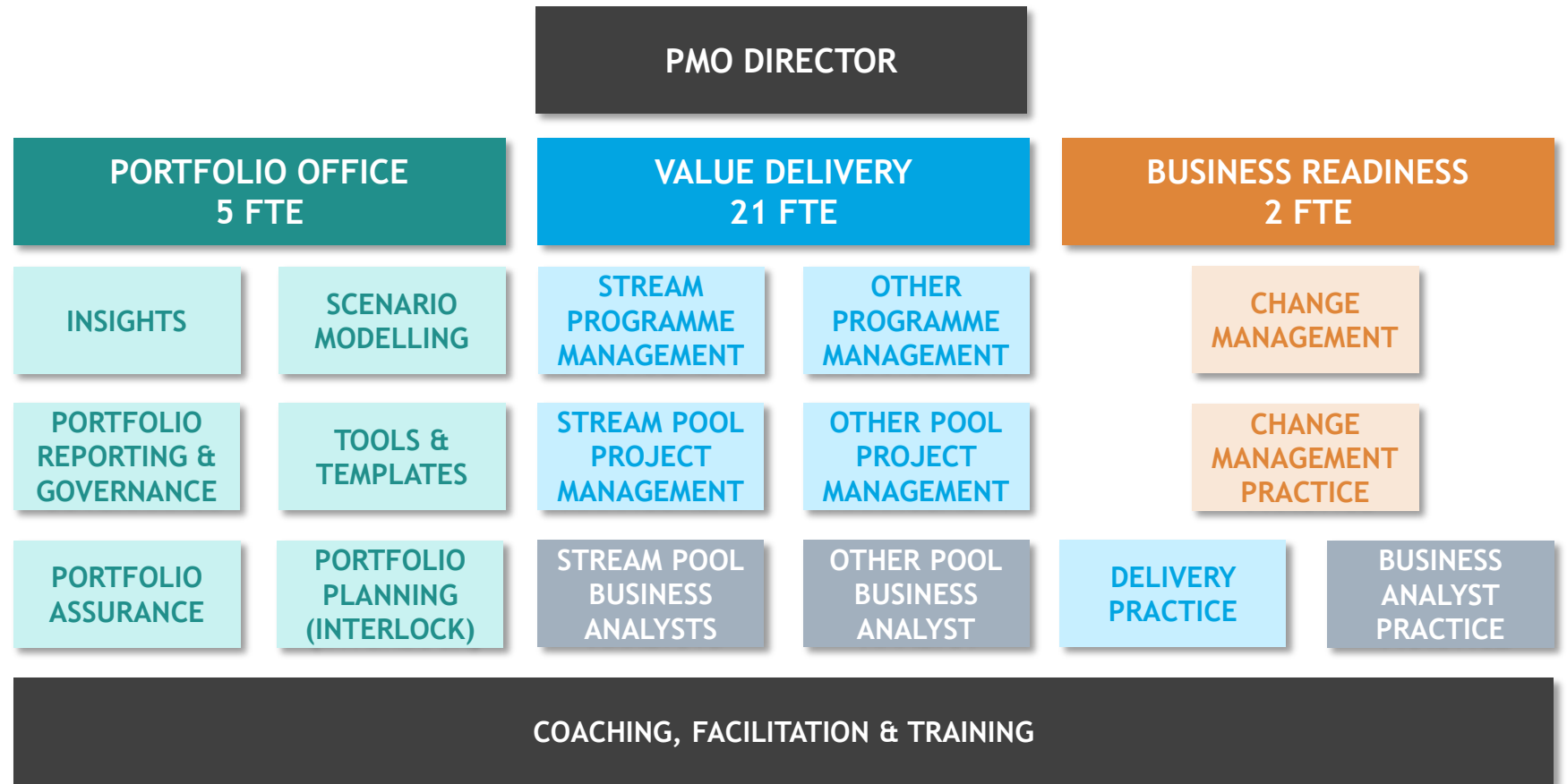
Formed in
Jun'21



28FTE
in 2 years



REALISE
STRATEGIC
VALUE | THE
RIGHT WAY |
FASTER



STRUCTURE PROS AND CONS



Trust

(share what good / not good at)



Conflict

(encourage Candid Debate)



Commitment

(support a Common Purpose)



Accountability

(Clear Roles and Responsibilities)



Results

(focused on Common Results)



A little Bit Cosy

(sometimes more trust than conflict)



Escalation of Issues

(want to resolve issues for themselves)



Behaviours

(expect same behaviour from other teams)

On the journey to high performance (leverage Lencioni / Myers Briggs)

HOW DO WE ENSURE OPERATIONAL EXCELLENCE

Understand What Problems We Are Here to Fix (Our Purpose)

Develop Approaches For Delivering Our Purpose

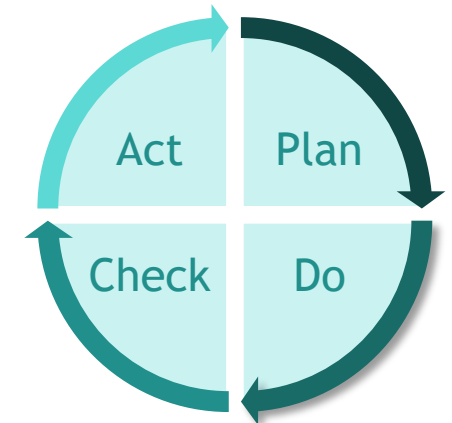
Understand Approach/Process Priority Pain Points

Identify Root Causes of Pain Points

Fix Pain Points

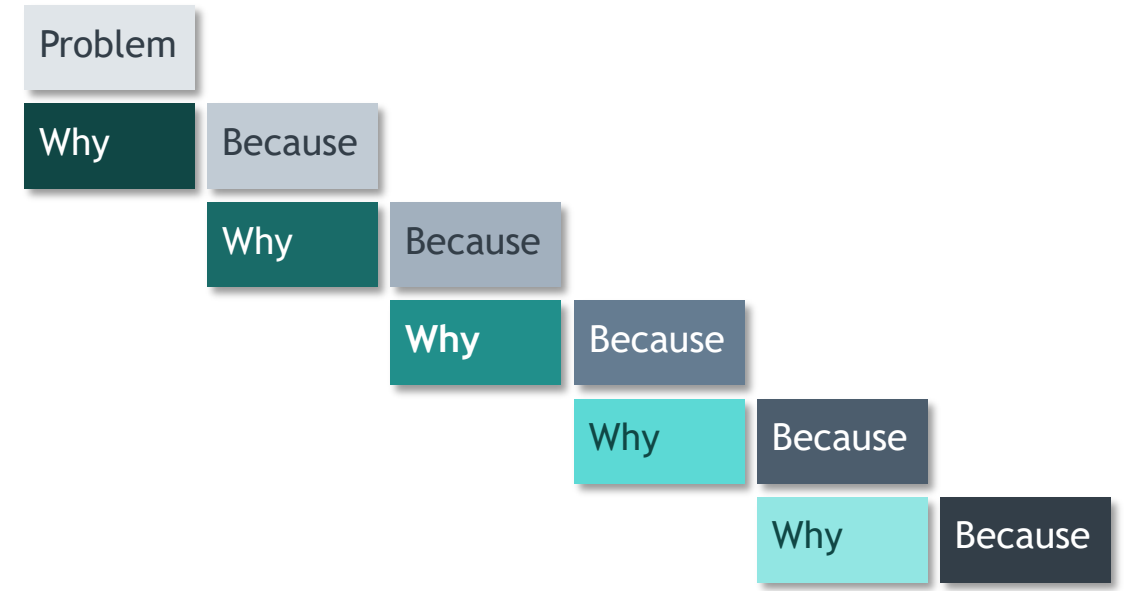
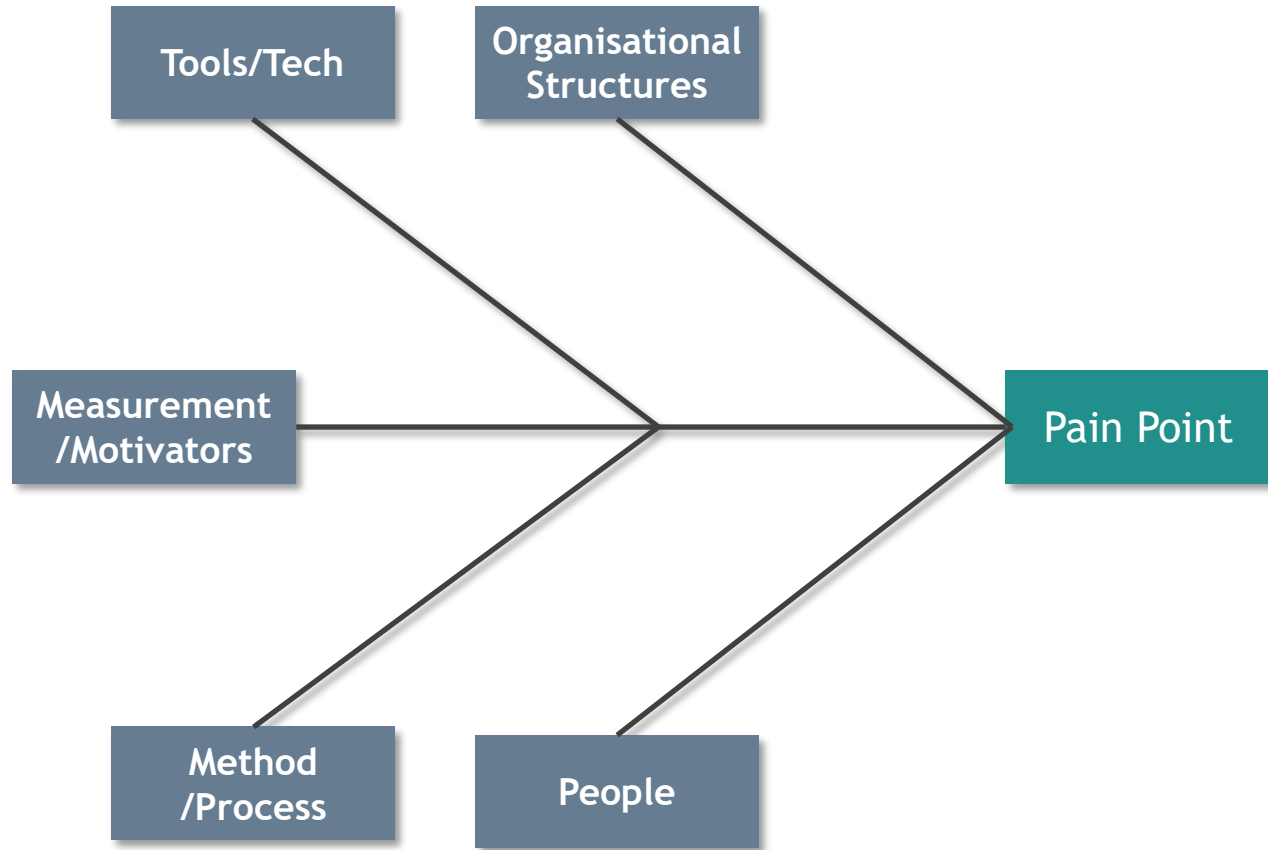
Key Levers We Can Improve Outcomes & Key Results (OKRs)

Use Pareto Rule
Fixing Top 20% of Root Causes Solves 80% of Problems



HOW DO WE UNDERSTAND ROOT CAUSES

Use the simplest techniques and make relevant to us



WHAT KIND OF THINGS SLOW DOWN THE DELIVERY OF OUR PURPOSE



Change Maturity



Change Language
Maturity



Solution Focused
Organisation



Autonomous
Partnership



All in it together
financially (one bill
for change)



Entrepreneurial
Business Service
Mindset



Who's Accountable



Anti Bureaucratic

HOW DO WE SURVIVE

Apply Cultural Excellence

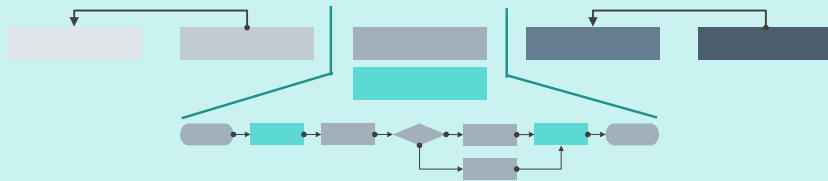
- *** Customer Centric
- 🍏 Simple Processes
- ☢️ Focus on Risk not best practice
- 🎯 Keep All Involved Engaged
- 👤 Lead by Example
- 📈 Continuous Improvement
- 🚶 Allow Autonomy within Limits
- 🧠 Keep Challenging Ourselves
- 🚫 Be Prepared to Stop stuff
- 🐉 Pareto Principle - Fix the bigger problems
- 💡 Pilot Ideas

Customer Centric Macro Processes

- 🔍 Programme Scoping
- 🧱 Project Delivery
- 🔄 Change Portfolio Prioritisation
- 👑 Change Portfolio Governance
- ☢️ Change Portfolio Risk Management
- 🔭 Provide Change Portfolio Insights
- 🦏 Ready the Business for Change
- 📋 Programme Assurance
- 🚚 *Coming Soon: Manage Downstream Costs of Change*

TOOLS WE USE TO ENSURE WE ARE CUSTOMER CENTRIC

SIPOC MACRO Processes



Clear OKRs



Apply Cultural Excellence at every opportunity

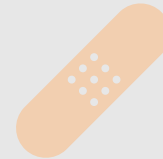
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Understand what Influences Processes

 Change Maturity	 Change Language Maturity	 Solution Focused Organisation	 Autonomous Partnership
 All in it together financially (one bill for change)	 Entrepreneurial Business Service Mindset	 Whose Accountable	 Anti Bureaucratic

And Continually Remedy Them

Avoid 'Band Aids'



Regular Review



Focus on Customer Centric Macro Processes

- 🔍 Programme Scoping
- 🏗️ Project Delivery
- 📅 Change Portfolio Prioritisation
- 👑 Change Portfolio Governance

WHAT IS SIPOC

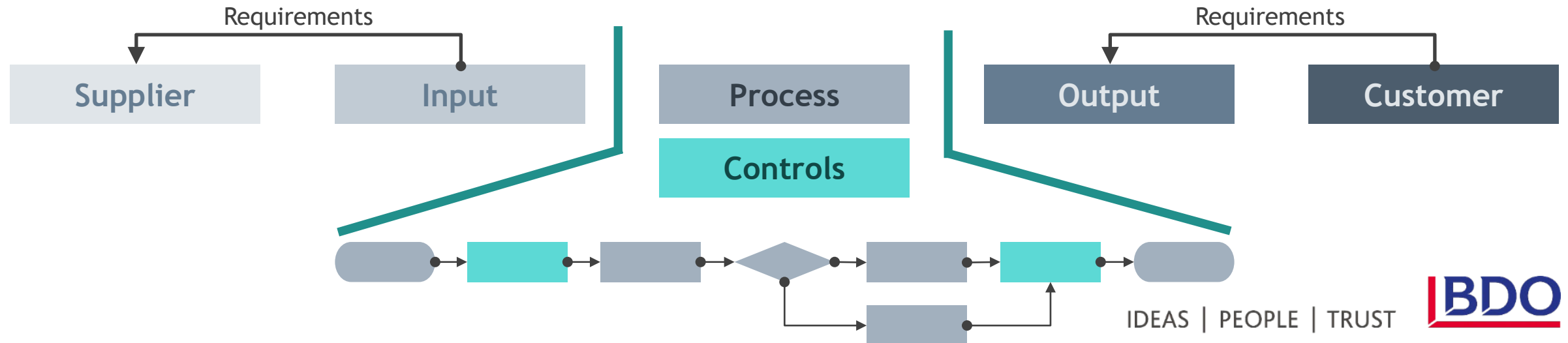
suppliers, inputs, process, outputs, and customers. A simple way to describe processes.

What is SIPOC:

- A simple way to summarise process inputs and outputs
- Defines a business process from beginning to end from before work begins
- Used since the late 1980s and continues to be used today in Six Sigma

How is useful?

- Ensures customer needs are translated into our services (We are delivering what customers need)
- Helps us understand our customer
- Helps us understand if we are taking the shortest / least complex route to delivering what they need

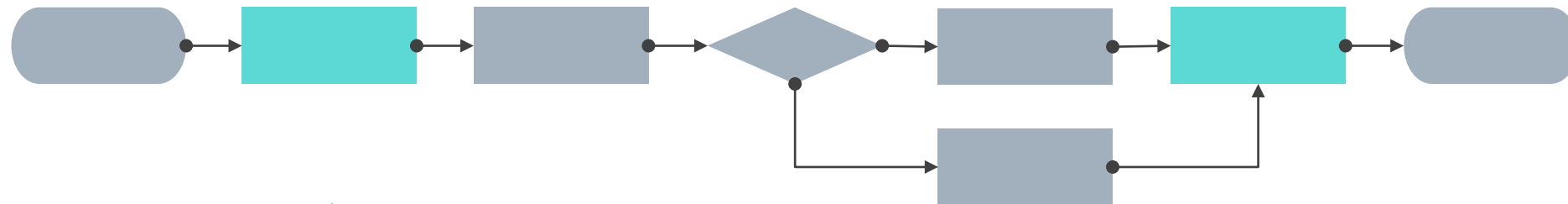
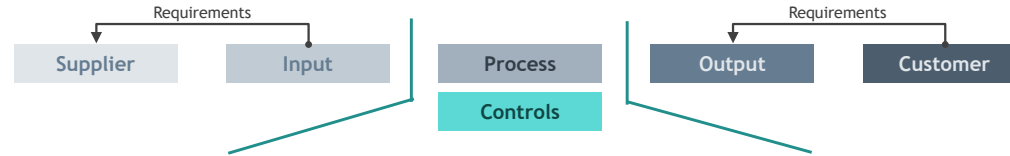


APPLY SYSTEMS THINKING / OPERATIONAL EXCELLENCE

A way of looking at processes as 'whole's' and relationships

Challenge:

- Mindsets
- Conditioned Thinking
- Structures etc.



- ★★★ Customer Centric
- 🍏 Simple Processes
- ☢️ Focus on Risk not best practice
- 🎯 Keep All Involved Engaged



POSITIVE OUTCOMES



77% > 90% of deliverables strategically aligned



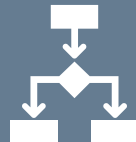
Rolling 12-month deliverables reduced from 164% to 13%



Business Readiness team involvement in 8 Programmes



Now leading 8/10 key programmes



All Cross Portfolio Dependencies Identified and Aligned



11 Simple lessons learned shared with delivery sponsors



34 non change people trained in Agile



£2.6m worth of Change Resources re-allocated to Quality



Automated reporting suite, we do insights not report collation



Standing still is the fastest way of
moving backwards in a rapidly
changing world.

— *Lauren Bacall* —

Any Questions?

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