# PMO Conference

LONDON 2023

# How our Portfolio Management Office created a new standard for delivery

**Ian Finch ChPP RPP FAPM**

Head of Portfolio Management Office

***Creating a new delivery standard within a Framework ensuring the 'best of both' organisations is retained when two Telecommunications giants merge***

# Learning

1. How creating a common purpose creates the foundations for successful transformation by enabling fast decision making that underpins rapid development and change
2. How company cultures and maturity levels play a key role in the design and roll out of processes and tools
3. The challenges of rolling out change amidst companywide change
4. The safeguards and techniques deployed to ensure a successful launch and continued transformation
5. The first year of our transformation – our Lessons Learned

# Background

**Two telecoms giants O2 and Virgin Media came together as part of a joint venture between their parent companies Telefonica and Liberty Global.**

**The new company announced their senior leaders very quickly thereby enabling them to shape and bring together the former companies into a single organisation at pace.**

**The guiding principle in this was use the ‘best of both’ and ‘keep things simple’ to ensure the highest possible synergies were achieved.**

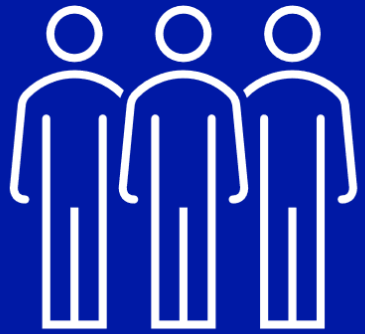
# Agenda

1. Our Journey from Legal Day one to the joint Framework Launch
2. Our Continuous Improvement Journey
3. Lessons Learned from the Launch and in our first year

# Our Journey

***2021***
***01 Jun***

# Our Journey



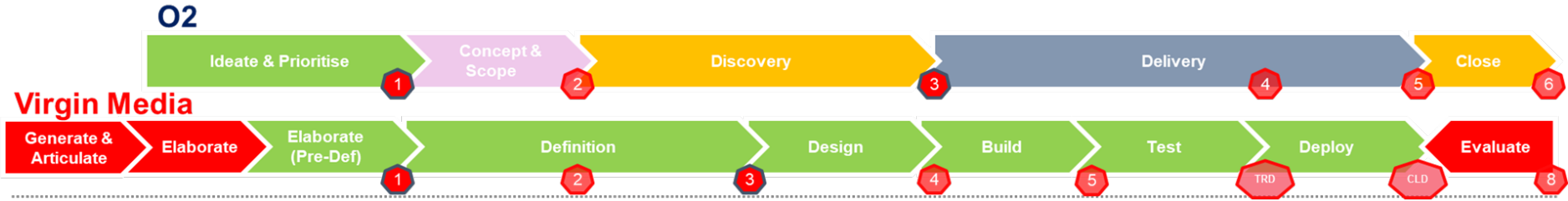
***Senior Leaders Confirmed***

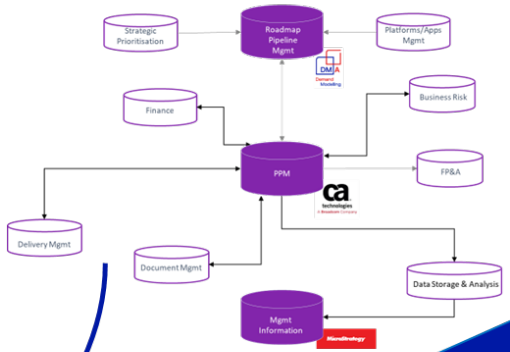
Legal Day One

***2021***

***01 Jun*** ***01 Jul***

# Our Journey




Legal Day One

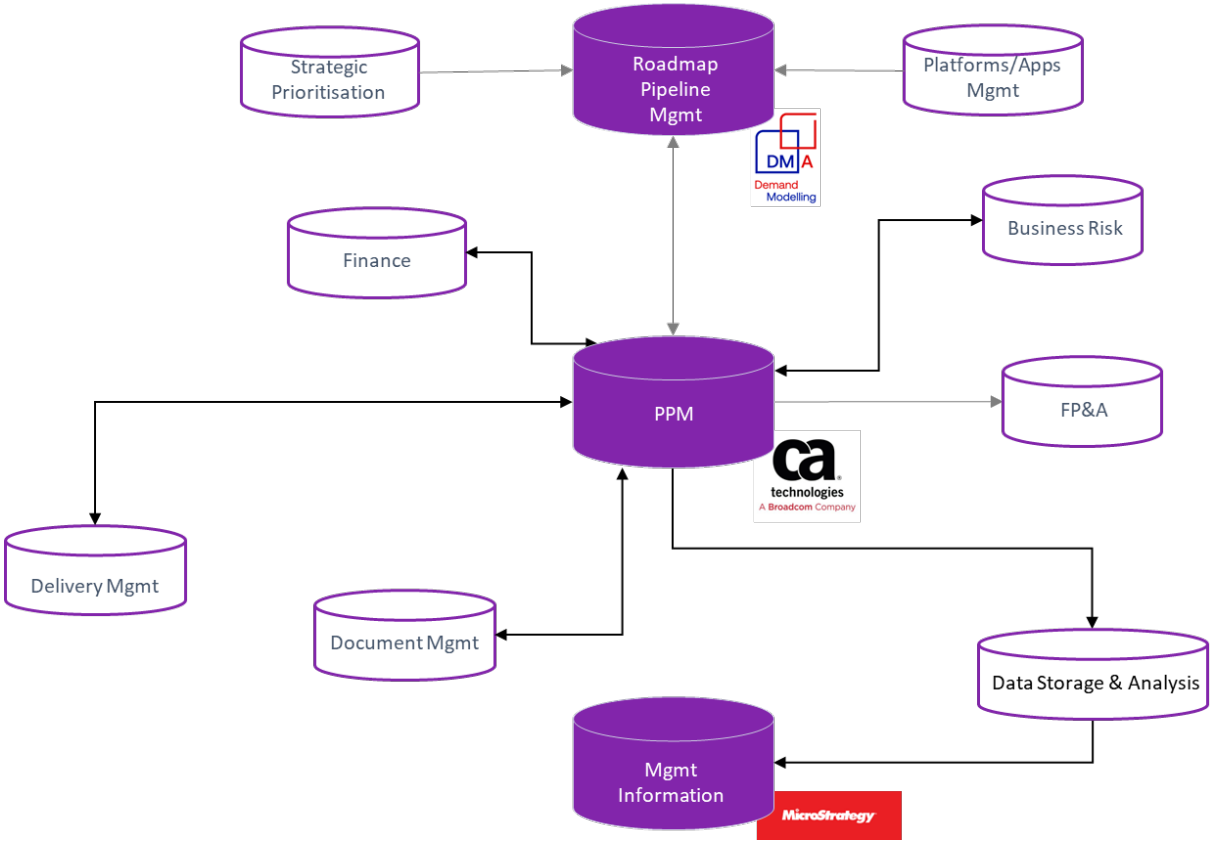
Senior Leaders Confirmed

Senior Leaders Approve Delivery Approach

2021

01 Jun — 01 Jul — Sep

# Our Journey


Strategic Prioritisation
Roadmap Pipeline Mgmt
Platforms/Apps Mgmt
DMA Demand Modelling
Finance
Business Risk
PPM
FP&A
ca technologies A Broadcom Company
Delivery Mgmt
Document Mgmt
Data Storage & Analysis
Mgmt Information
MicroStrategy

# Our Journey

Legal Day One

Senior Leaders Confirmed

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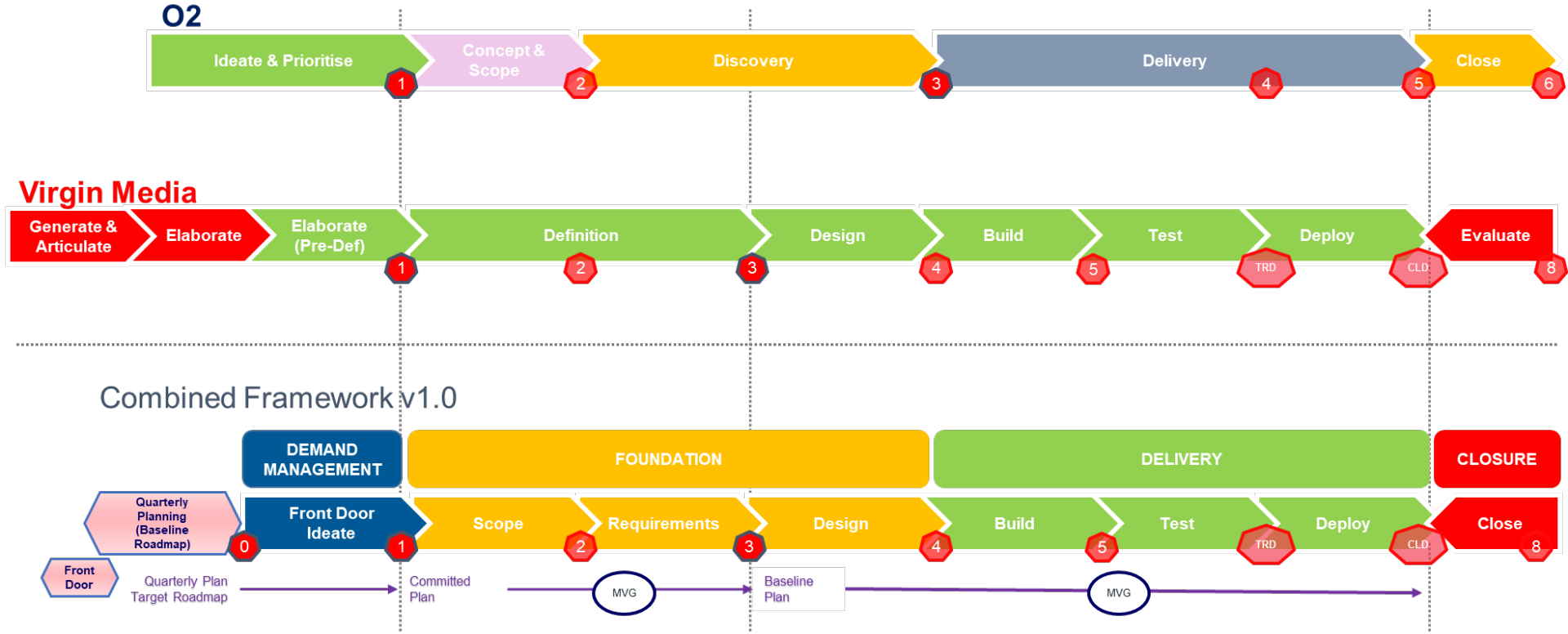
2021

01 Jun

01 Jul

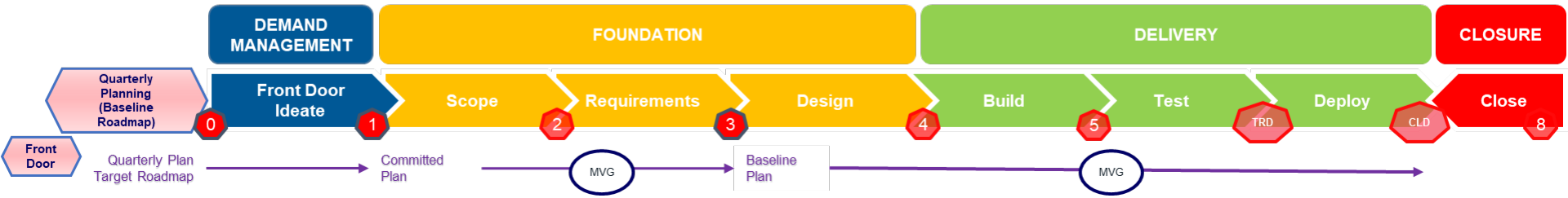
Sep

# Our Journey


O2
Ideate & Prioritise
Concept & Scope
Discovery
Delivery
Close
1
2
3
4
5
6
Virgin Media
Generate & Articulate
Elaborate
Elaborate (Pre-Def)
Definition
Design
Build
Test
Deploy
Evaluate
1
2
3
4
5
TRD
CLD
8
Combined Framework v1.0
DEMAND MANAGEMENT
FOUNDATION
DELIVERY
CLOSURE
Quarterly Planning (Baseline Roadmap)
Front Door Ideate
Scope
Requirements
Design
Build
Test
Deploy
Close
0
1
2
3
4
5
TRD
CLD
8
Front Door
Quarterly Plan Target Roadmap
Committed Plan
MVG
Baseline Plan
MVG

# Our Journey

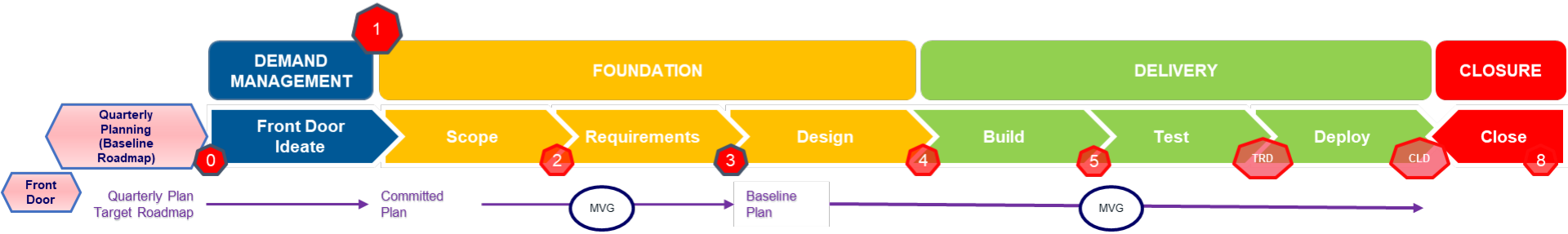
***OKRs***



# Our Journey

## *OKRs*

1. ***KR1*** *– Starting a Project to the agreed Roadmap Plan*

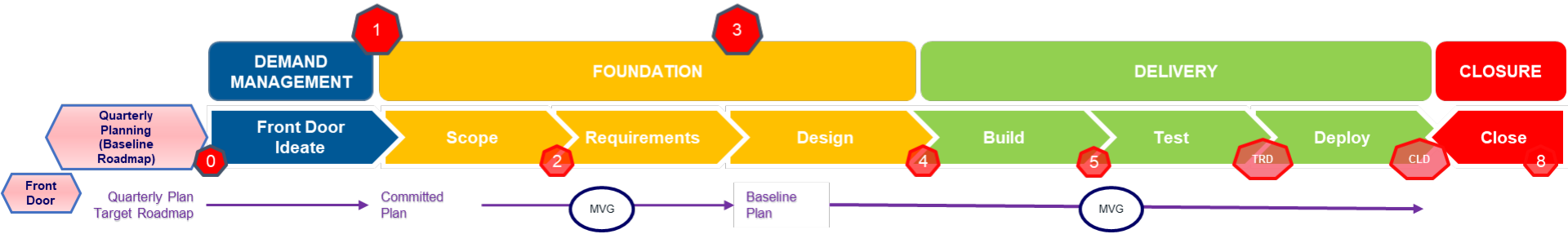


# Our Journey

## *OKRs*

1 ***KR1*** – *Starting a Project to the agreed Roadmap Plan*

3 ***KR2*** – *Baselining a Project to the agreed Project Manager Committed Plan*



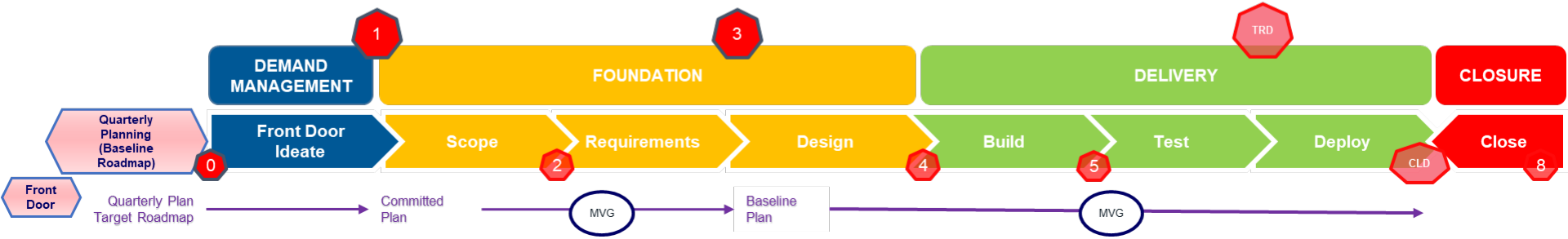
# Our Journey

## *OKRs*

1 ***KR1*** – *Starting a Project to the agreed Roadmap Plan*

3 ***KR2*** – *Baselining a Project to the agreed Project Manager Committed Plan*

TRD ***KR3*** – *Meeting the Baselined Technically Ready Date*



# Our Journey

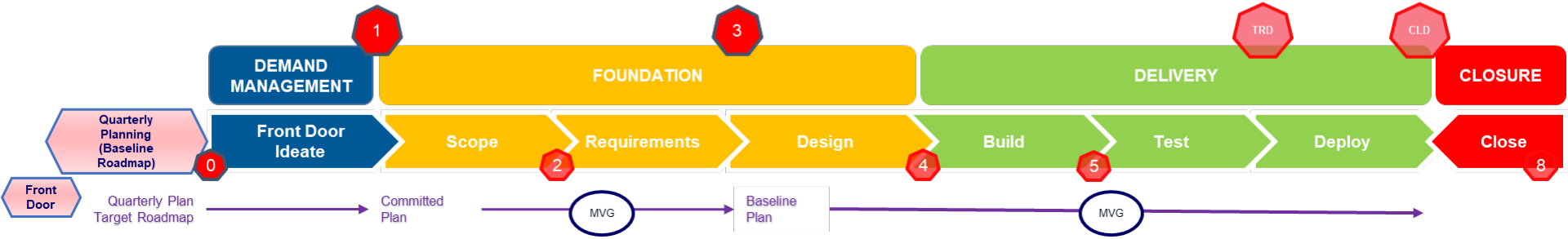
## *OKRs*

1 ***KR1*** – *Starting a Project to the agreed Roadmap Plan*

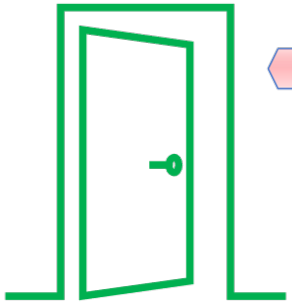
3 ***KR2*** – *Baselining a Project to the agreed Project Manager Committed Plan*

TRD ***KR3*** – *Meeting the Baselined Technically Ready Date*

CLD ***KR4*** – *Commercial Launch of the Project on the Baselined Date*



# Our Journey



DEMAND MANAGEMENT
FOUNDATION
DELIVERY
CLOSURE
Quarterly Planning (Baseline Roadmap)
Front Door Ideate
Scope
Requirements
Design
Build
Test
Deploy
Close
0
1
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4
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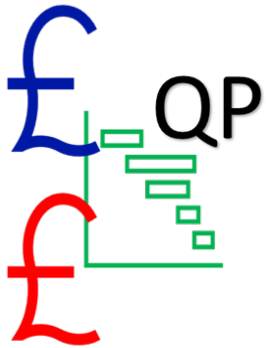
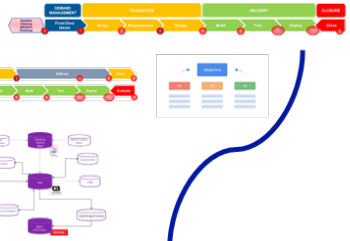
FRD
CLR
8


QP

Senior Leaders Approve Delivery Framework



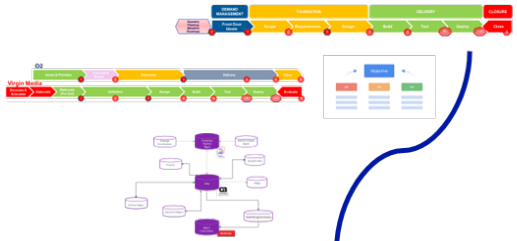
Legal Day One

Senior Leaders Confirmed

Senior Leaders Approve Delivery Approach

2021
01 Jun
01 Jul
Sep
Oct
Nov
01 Dec

# Our Journey



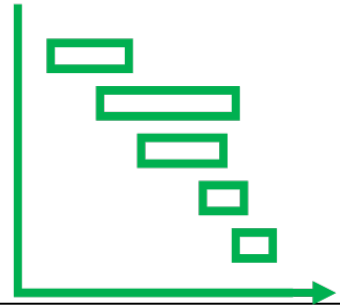
Senior Leaders Confirmed

Senior Leaders Approve Delivery Approach

QP

Senior Leaders Approve Delivery Framework

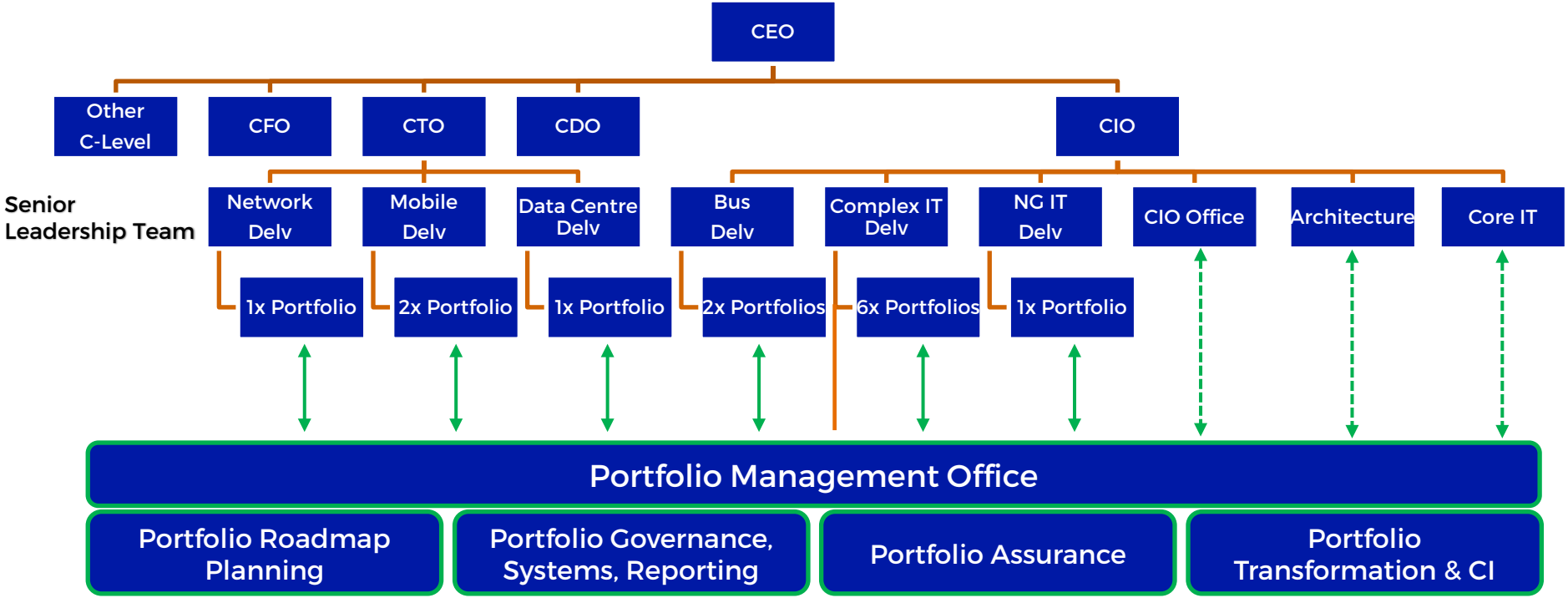
New Company Technology Operating Model Confirmed



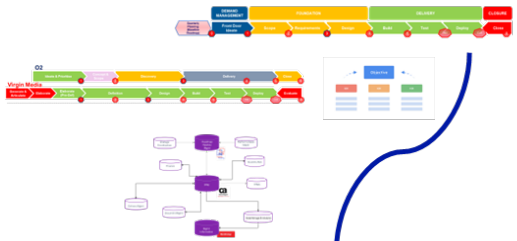
2021

01 Jun — 01 Jul — Sep — Oct — Nov — 01 Dec — 10 Dec

# Our Journey


CEO
Other C-Level
CFO
CTO
CDO
CIO
Senior Leadership Team
Network Delv
Mobile Delv
Data Centre Delv
Bus Delv
Complex IT Delv
NG IT Delv
CIO Office
Architecture
Core IT
1x Portfolio
2x Portfolio
1x Portfolio
2x Portfolios
6x Portfolios
1x Portfolio
Portfolio Management Office
Portfolio Roadmap Planning
Portfolio Governance, Systems, Reporting
Portfolio Assurance
Portfolio Transformation & CI

# Our Journey



Socialise & Refine with VoC

Training Planning

Legal Day One

Senior Leaders Confirmed

Senior Leaders Approve Delivery Approach

QP

Senior Leaders Approve Delivery Framework

New Company Technology Operating Model

Portfolio

2021

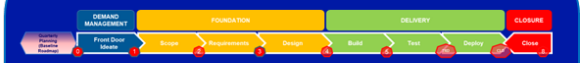
01 Jun — 01 Jul — Sep — Oct — Nov — 01 Dec — 10 Dec

2022

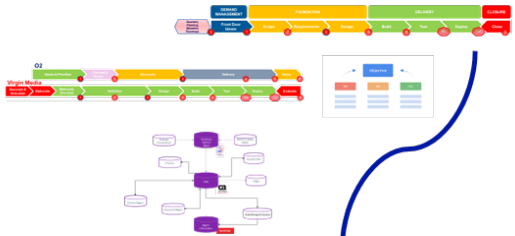
Jan — 01 Mar

# Our Journey

Q&A



Delivery Framework Launched



Legal Day One

Senior Leaders Confirmed

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QP

Senior Leaders Approve Delivery Framework

New Company Technology Operating Model

Portfolio

Socialise & Refine with VoC Training Planning

2021

01 Jun

01 Jul

Sep

Oct

Nov

01 Dec

10 Dec

2022

Jan

01 Mar

14 Mar

# Lessons Learned

**Fail Fast**

**People over process**

**Build Trust (Culture)**

**Compromise**

**Best of Both**

**Learn the Culture**

**VoC – adapt and improve**

**Capture Questions, communicate the answers quickly**

**Communicate, Communicate & Communicate**

**Be Resilient**

# Our CI Journey

*Framework 1.0*

**Stabilise**

**Communications Plan – drumbeat / multi media – AHC, Roadshows, Surgeries, Drop-ins**

DMA Demand Modelling

ca technologies A Broadcom Company

MicroStrategy

**Q&A**

**Voice of Customer**

**Backlog**

Jira

**2022**

**14 Mar** — **Apr**

# Our CI Journey

Q&A

Backlog

Voice of Customer

Jira

Clarity Sprints / Reporting Sprints / MS Architecture Adjustments / Quarterly DMA Releases

Minor Change Systems & Reporting Improvement

Communications Plan – drumbeat / multi media – AHC, Team, Roadshows, Surgeries, Drop-ins

Framework 1.0

DMA Demand Modelling

ca technologies A Broadcom Company

MicroStrategy

CI

Product Owner Group

Stabilise

Embed

2022

14 Mar

Apr

Jun

Sep

# Our CI Journey

Q&A

Backlog

Voice of Customer

Jira

Process Automation

Clarity Sprints / Reporting Sprints / MS Architecture Adjustments / Quarterly DMA Releases

CI CI CI CI CI CI CI

Communications Plan – drumbeat / multi media – AHC, Team, Roadshows, Surgeries, Drop-ins

Framework 1.0

DMA Demand Modelling

ca technologies A Broadcom Company

MicroStrategy

Engagement automation Phase 1

Framework 2.0 Design

Framework 2.0 Training & Launch

Stabilise

Embed

Embed

2022

14 Mar

Apr

Jun

Sep

Nov

2023

02 Jan

# Our CI Journey

Q&A

Backlog

Voice of Customer

Jira

Process Automation

Systems Integration
Machine Learning & AI

Clarity Sprints / Reporting Sprints / MS Architecture Adjustments / Quarterly DMA Releases

CI CI CI CI CI CI CI

Communications Plan – drumbeat / multi media – AHC, Team, Roadshows, Surgeries, Drop-ins

Framework 1.0

Framework 2.0

DMA Demand Modelling

ca technologies A Broadcom Company

MicroStrategy

SharePoint Relaunch

Framework 3.0 Design

Framework 3.0 Training & Launch

Stabilise

Embed

Embed

2022

14 Mar

Apr

Jun

Sep

Nov

2023

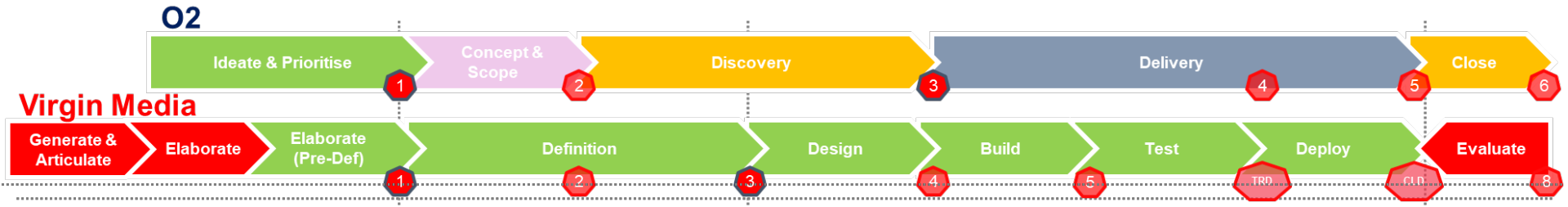
02 Jan

03 Apr

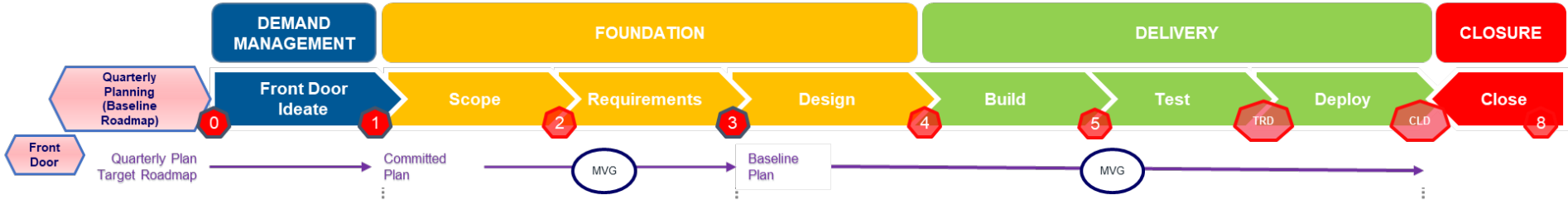
# Our CI Journey in numbers

| CoE Team | No. Sprints / Releases since April 2022 | No. Tickets Completed Jira |
|---|---|---|
| Roadmap Model | 12 [3 RIse] | 110 |
| Clarity | 11 | 136 |
| Reporting | 15 | 132 |
| Governance & Process | 12 | Integral support / assurance of all tickets |
| **Total** | **50** | **378** |

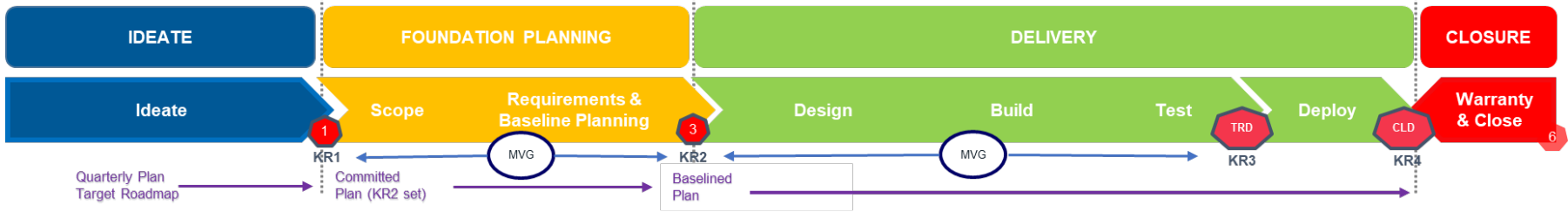
# Our Framework Journey



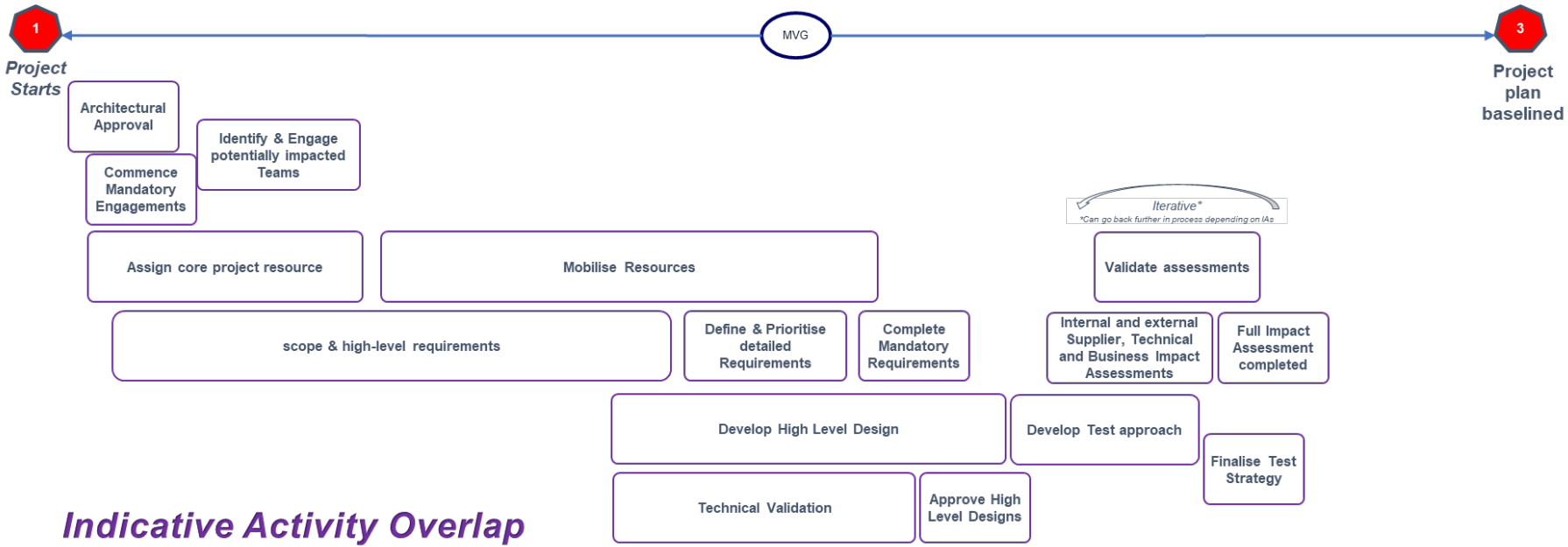

## Combined Framework v1.0




## Current Framework *(Individuals & Interactions over Processes & Tools)*



# Flexible Key Activities example



# CI Lessons Learned

**Formalise VoC and its feedback**

**CI – derived from Q&A, failing fast, VoC**

**Develop Sizing and CI approach as you go**

**Be comfortable with Fail Fast**

**People over process (Culture)**

**Structure the CI – (Jira – Scrum / Kanban / Value Stream)**

**Communicate - use VoC – (you said, we improved)**

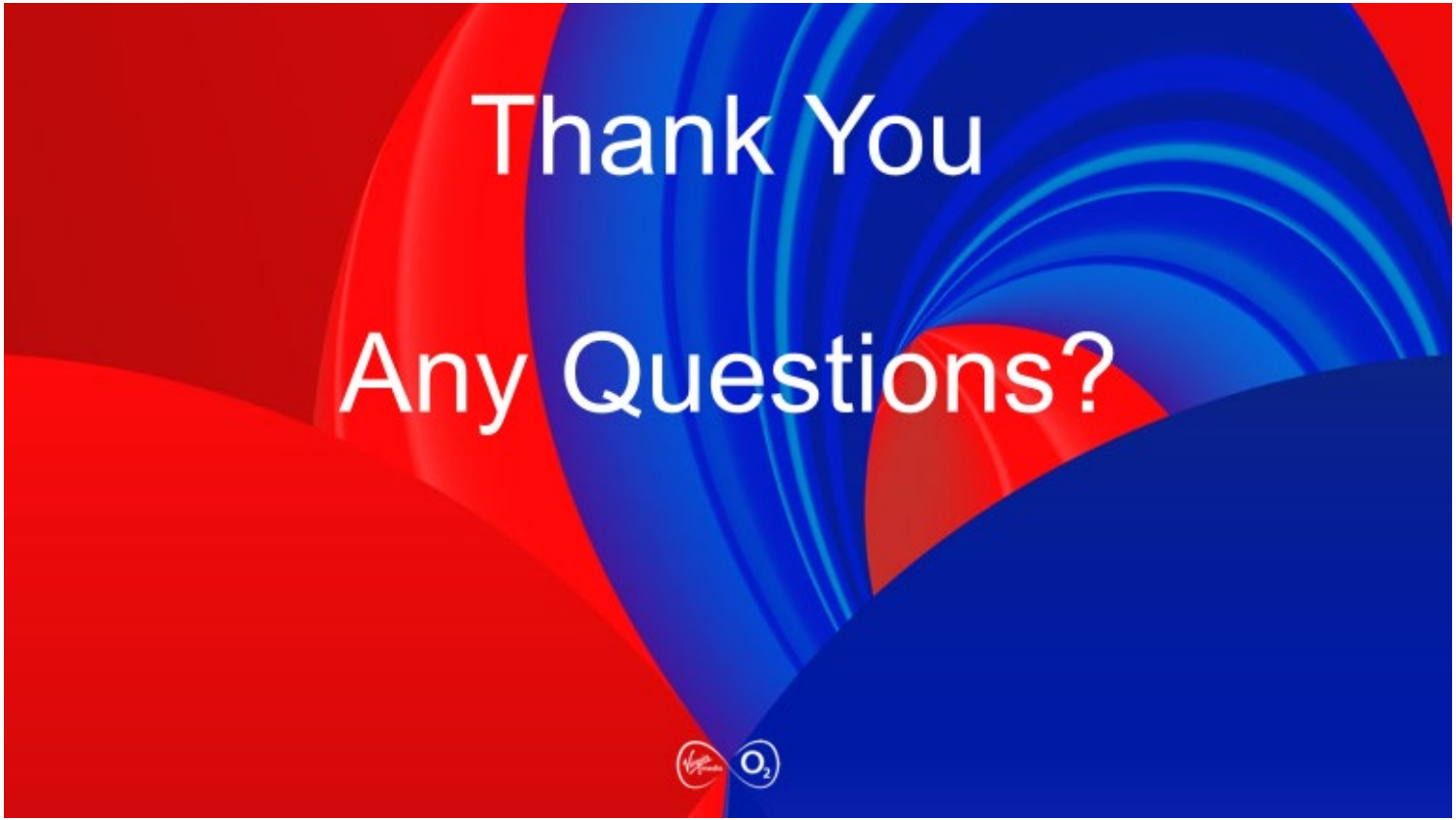
**Use as many communications media as you can**

**Create a drumbeat of communicated CI Plans**

**Delivery Essentials not PMO Newsletter**

# Learning

1. How creating a common purpose creates the foundations for successful transformation by enabling fast decision making that underpins rapid development and change
2. How company cultures and maturity levels play a key role in the design and roll out of processes and tools
3. The challenges of rolling out change amidst companywide change
4. The safeguards and techniques deployed to ensure a successful launch and continued transformation
5. The first year of our transformation – our Lessons Learned


Thank You
Any Questions?