

Moorhouse
Anything together

The **inside track**
on developing
PPM capability.

Seven practical steps to maximise
the benefits of PPM delivery.



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Introduction

As business transformation specialists, Moorhouse is experienced in supporting clients seeking to enhance their internal programme and project management (PPM) delivery capability. As part of our 'Inside Track' series, we have identified seven practical steps to maximise the benefits of PPM capability enhancement programmes. To bring these seven steps to life, we have also included our experience of supporting a major organisation in a multi-award winning, 'best practice' case study.

We hope you find this guide helpful.

Case study: Project SPEARMINT

The Surface Transport Division of Transport for London (TfL) was charged with delivering a £2.5bn component of an overall five-year Investment Programme. This equates to about 1000 projects per year and a £2.5m investment every working day. Faced with this challenge, they recognised that they needed to develop their ability to 'do the right projects' and 'deliver projects right'.

Like many organisations they needed to consolidate the many inconsistent ways projects were delivered into a common approach. They needed clearer governance structures and controls in order to provide an accurate picture of project delivery status across the business. They also wanted to support the on-going professional development of their project management community.

The result was a multi-award winning one-year PPM capability improvement initiative, SPEARMINT, led by Moorhouse.



Step 1: Establish a discrete, formal project to deliver the capability improvement required

At the risk of peddling platitudes, an initiative to improve the PPM capability of an organisation should be run as a very tight project – pedantically so. This would be glib if it were not for the observation that many similar initiatives do not incorporate the very disciplines they seek to promote.

Aside from courting ‘classic project failure’, ‘loose’ initiatives will flounder very quickly on credibility challenge.

Case study: Project SPEARMINT

Project SPEARMINT was clear in its scope and timeline. From the outset the team communicated the fact that it would be a discrete, one-year initiative and this was central to developing the necessary momentum and delivery focus. It concentrated all concerned on the project ‘end game’ i.e. successfully transitioning from the delivery of required ‘enablers’ to an operational focus on embedding new and sustainable practices.

The Project SPEARMINT team self-imposed a strict regime of PPM management control on themselves, through the use of a project board and quality assurance function, tight stage management events and the comprehensive adoption of project management control products and tools. This approach, which the team concede was laboured at times, was fundamental. Aside from the inherent control it introduced, it enabled the team to constantly debate ‘what aspects of this methodology work for us?’ and communicate, through practical example, core aspects of the resulting SPEARMINT methodology to an observing audience.

“Practice
what you
preach”



Step 2: Establish the project team - with 'light touch' external support as necessary

Key to the success of an endeavour of this nature is the composition of the project team – both in terms of individual skills but also, more importantly, in the combination of internal staff and external support.

For long term project success it is important to ensure a balanced project team. Some organisations have so habitualised the use of consultants, they forget to challenge whether their own staff have the internal capability to undertake sustainable change.

Don't mistake habit for logic.

Home-grown change is inherently more sustainable than externally-agitated transformation regardless of how collaborative the client-consultant team is. Large-scale transformation invariably requires some external expertise and support but ensure you always exhaust your own 'talent pool' before you hire externally.

Case study: Project SPEARMINT

Project SPEARMINT was supported by a small team of specialist programme management advisory consultants from Moorhouse. More importantly, however, it was staffed by committed TfL staff members who could credibly represent the PPM challenge within different business areas and act as the residual 'change agents' on project completion.

This approach is strongly advocated as the balance required to ensure sustainable benefits.

“Physician
heal
thyself”




Step 3: Focus on the fundamental imperative of leadership as the 'force multiplier'

The importance of leadership is another truism, but what does it mean in practice? Well, aside from the somewhat ethereal qualities of visioning and motivating people, it entails giving people unequivocal role clarity and letting them know that they are 'in charge'. Remove the ambiguity and clutter and it is often startling how well people respond to 'stretch targets' that are clearly theirs to achieve.

It is essential that the roles of Senior Responsible Owner and Project Manager not only imbue individual leadership traits but work in combination to provide a real sense of purpose. One without the other is nugatory; for instance, a project team can be well led (from an isolated perspective) but deliver a product the business doesn't want.

Whilst leadership is a 'soft' topic that is described in tomes of management literature, it should not be ignored; aside from a focus on recruiting and nurturing individual leadership traits, an organisation can systemically encourage the development of this aspect through project role clarity. Leadership is always the force multiplier that facilitates project teams in treading that 'extra mile'.



"Lead and others will... lead"

Case study: Project SPEARMINT

Project SPEARMINT dealt with this in two ways; firstly by the behaviours it adopted internally and, secondly, by the messages it communicated to the business through the resulting methodology and training.

Within the SPEARMINT team there was a very clear role division and dynamic between the business lead (Senior Responsible Owner) and the Project Manager. This 'partnership' was critical and, accordingly, it is a key component of SPEARMINT's PPM governance framework.

Additionally, a Project SPEARMINT Board was constituted to represent the key directorates of the Surface Transport business and to provide counsel to each critical (stage) gate. Setting up a project board was essential and the vested time of these directors ensured that senior leadership support for the change was strongly signalled. The resulting SPEARMINT Framework now enforces the mandatory assignment of a Senior Responsible Owner (SRO) and Project Manager to all of its projects. It was recognised that in some areas of the business this was a cultural change as, previously, some projects languished in the 'comfort of committee'.

In recognition of this, a core element of the project was focused on training future SROs – emphasising the responsibilities of the role and the necessity for fast-tempo decision making.

Whilst this concept has been well embedded in large tracts of the UK Public and Private Sectors, there are still many organisations that can benefit from the clarity this role brings to project delivery.



Step 4: Scope the initiative to cover all change dimensions – ‘hard’ and ‘soft’

There is a growing recognition within the boards of many public and private organisations that competent programme and project delivery is a primary capability to develop within an organisation. Without such a capability there is a ‘dialogue of the deaf’ between those who craft strategy and those charged with its practical implementation.

If it was easy, however, it wouldn't be an issue that can differentiate organisational success because everyone would do it overnight. A nuance of the challenge is that previously ‘project management’, as a profession, competence or knowledge area, has been under-valued (especially in engineering-based sectors). There exists in many organisations an unstated assumption that competent PPM is a ‘given’ and that all professional managers can deliver projects as a natural subset of their wider skills. Such a view is often naive.

The first stage of PPM organisational maturity is to recognise PPM capability as both vital to an organisation's delivery success and an aspect which can be explicitly targeted and improved.

Case study: Project SPEARMINT

Project SPEARMINT scoped its initiative as a broad affair with multiple components – development and communication of a PPM method, staff communication and training, establishment of an organisational ‘infrastructure’ to govern projects and the establishment of support forums to help embed change.

All of these focused on the ‘softer’ side of PPM capability development, recognising that this needs to be in place before an organisation is mature enough to really derive benefit from any enterprise-wide IT tool.

Beware of any PPM capability ‘fix’ that extols a single, primary element – be it a training ‘roll out’, an IT tool, a CD replete with control templates or the latest methodology buzz.

“Engage on **multiple** fronts”



Step 5: Ensure the communication workstream is adequately planned and resourced

There is a danger that the topic of communication management has become so hackneyed that many have now put the basic tools (e.g. stakeholder maps, communication plans) back 'on the shelf'.

Think again.

Communication is without doubt the most important and challenging aspect of an internal PPM capability improvement initiative. Two important areas to consider are:

Brand the project

This is essential. Aside from being a mouthful, a project referenced primarily as "improving the programme and project management capability within X" also becomes somewhat bland and unmemorable. Before you know it, it will be lost in the homogeneity of internal corporate initiatives.

Use multiple communications channels

Once you have mapped stakeholders, use multiple channels when building the communications plan.

Some words of caution are also apt; steel yourself for the default reaction to the first communication effort which is invariably one of "why haven't I heard about this before; it is always the paradox of project communication that the first, concerted effort is met with "you need to communicate" feedback. The good news is the change journey of awareness - scepticism - challenge - understanding - advocacy has started.

Finally, don't expect a 'eureka moment'; improving something so fundamental happens in increments over time; notwithstanding, a concerted and well run communications campaign eventually produces a 'tipping point' – the point at which a vanguard of internal advocates achieve 'critical mass'. At this point, the potential to realise radical improvement is truly enabled; just be prepared to work for it.



Case study: Project SPEARMINT

Project SPEARMINT had a dedicated communications team leader and rotated this role to accord for the work rates required to do it well.

From the outset the SPEARMINT team recognised the need to brand the project. They branded the project in terms of name, logo and consistent 'look and feel' communication templates. This quickly gave all staff a 'tag' with which to quickly reference the project which in turn helped forge an important sense of initiative identity and permanence.

The SPEARMINT team deployed resources in senior director one-to-one meetings, management briefing forums, roaming support visits to each business area and to create in-house magazine articles, branded emails, posters and seminars.'

Barring the use of a wandering Styrofoam SPEARMINT mascot (it was discussed), the project team felt confident that full use had been made of media types and communication channels.



"Communication,
communication,
communication"



Step 6: Benchmark with others and objectively measure 'change' progress

You can take comfort in reading this that you will not be working within the first organisation seeking to drastically improve its PPM capability or, indeed, the last. Once the executive 'green light' has been given to such an endeavour, it is always tempting to jump straight into solution mode. Avoid this seduction and 'hold your nerve' for a short period, as there is much to be learnt from those that have 'trod this path' before.

Once the external environment has been 'scanned' for 'best practice', it is important to propose, and subsequently measure, success indicators for the change initiative. The goal is clearly to demonstrate that the organisation is not just 'doing projects right' but 'doing the right projects'.

Excellence can be described as 'being able to measure what others cannot even describe'; it is often the case, therefore, that in 'immature' organisations baseline data describing project delivery will not exist. This data facility should therefore become an output of the project itself.

In the interim, a project of this nature should propose 'proxy' measures that support intelligent conjecture that the organisation is moving in the right direction; for example, the number of Project Managers who have professional accreditation/training; qualitative awareness of a common framework etc.

Change is always about moving perceptions and feelings at an individual and emotional level. Without such a tool, the perception of change progress is often biased to the project team's wishes – as opposed to the reality.

“Look around often but obsessively at yourself”

Case study: Project SPEARMINT

The SPEARMINT team spent the first weeks of the project visiting other public and private sector organisations that had similar project portfolios and had undertaken an initiative of this type.

These organisations (SPEARMINT visited five multi-national telecommunication firms and government departments) were all acknowledged PPM 'leaders' with much to impart in relation to their own experiences (good and bad).

A number of site visits were organised and benchmark reports written up; these subsequently proved invaluable both in terms of shaping the project's approach and for building credibility when proposing new ideas.

The SPEARMINT team thoroughly advocate this type of exercise at the inception of any similar initiative. The SPEARMINT effort also adopted a simple 1 to 10 (Proactive Detractor to Proactive Advocate) change scale that it measured during all interventions with the business – for example, before and after visits to business areas, before and after training courses etc.

Whilst simplistic, when aggregated, this data provided invaluable trend analysis and supported the project team in understanding which change approaches were moving the team closer to the 'tipping point'.

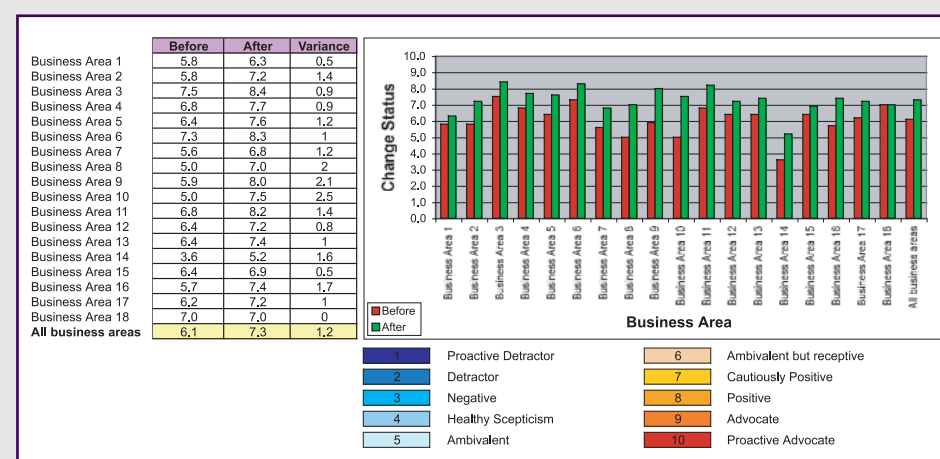


Figure 1 - The use of simple change measurement tools provides useful 'trend data' – the example above shows the before/after results of one of the SPEARMINT interventions.



Step 7: Keep PPM methodology lean and avoid temptation to overly bespoke

Remember to keep any standard project lifecycle simple. Follow these key design principles for an effective programme:

- Align with recognised 'best practice'; there is absolutely no point in developing a finely-tuned, complete bespoke solution – you will only spawn a 'cottage industry' in methodology maintenance and training if you do so.
- Organise the framework by PPM subject matter 'strands' for the easy reference and signposting of materials.
- Provide a 'menu' of control products but only mandate a 'light touch' approach. The onus should be placed on the professionalism of project managers to introduce greater control than the organisation demands. The risk is always that a cumbersome process, mandated from the centre, is either deliberately ignored, or subtly manipulated; a 'light touch' approach encourages a 'Collective Professional Expectation' culture whereby the PPM community self-polices its own standards – a far more potent vehicle for change.
- Include a simple project categorisation system in order that small projects don't get treated in the same way as £ multi-million endeavours. Keep this categorisation simple – SPEARMINT used a 3-level categorisation model that allocates a degree of control proportional to the value, strategic imperative and risk of a project.
- 'Don't throw the baby out with the bath water'. A PPM Framework will touch on many standard practices and operating procedures that pre-exist within the business; the skill is not in reinventing these but in bringing them together in a coherent framework.

Case study: Project SPEARMINT

A core deliverable of Project SPEARMINT was a PPM methodology that integrated the approach of all project managers across all Surface Transport directorates (previously separate companies).

Informed by their findings from the benchmark visits, and knowledge of TfL's project portfolio and business, the SPEARMINT team developed a method (and a supporting guidance/template/tool repository) with the above key design principles in mind.

As befits a portfolio consisting of lots of small projects amidst the monoliths, SPEARMINT adopted a 4-stage lifecycle (with corresponding approval gates) as its mandated minimum.

Whilst the actual SPEARMINT methodology was forged with knowledge of the recipient business area, it was felt by the SPEARMINT team that there is universality in many of these design principles.

"Keep it simple
stupid (KISS)"



Summary

Organisations with large delivery portfolios can make smart strategic gain through targeted interventions that seek to improve internal PPM delivery capability. Such efforts, if well run, return handsomely on their investment – through increased project efficiency, staff motivation and retention – which, in turn, drives greater profits and benefits from the portfolio.

But 'well run' is the elusive, key phrase.

Such efforts need to be discrete and run as formal change projects – with business ownership, membership and leadership carefully considered when bringing together the team.

The project scope also needs to be multi-dimensional – addressing the needs for organisation and governance re-design, process and tool development and the essential, training, coaching and support elements.

A particular emphasis should be placed on keeping any resultant PPM methodology lean and 'fit for purpose' – don't get seduced into developing a complex, bespoke tool or process – as it will bring only marginal benefit and come with a high maintenance overhead.

Like all change efforts, communication will be key – underestimate this at your peril. Finally, don't forget to benchmark with others who have trod similar paths and to use objective data in tracking progress towards attitudinal acceptance and eventual success.

Good luck.



Further reading

Moorhouse helps organisations design and deliver successful transformation. Moorhouse is committed to sharing its knowledge and improving the quality of programme and project management in the UK. As part of this commitment, Moorhouse has produced several publications and articles which can be found at:

www.moorhouseconsulting.com



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