PTS

PTS | **ENTERPRISE PROJECT AND PROGRAMME MANAGEMENT**

Services Prospectus

September 2023

PTS

1 | INTRODUCING ENTERPRISE PROJECT AND PROGRAMME MANAGEMENT

1. INTRODUCING ENTERPRISE PROJECT AND PROGRAMME MANAGEMENT

1.1   The Proposition

When complex clients seek accelerated change and new solutions, a PTS Business Manager tailors a mix of technical capabilities into a solution. PTS' Enterprise Project and Programme Management enables a client to:

- Design and Operate Project Structures

- Deliver project outputs

- Manage programme outcomes

- Maintain project governance

- Assure business benefits

- Accelerate change

- Make timely innovations, remediation and project refactoring

1.2   A Challenge for most Enterprises

Operational complexity is a drag anchor on the accelerated change that organisations require to deliver business benefit. This complexity has many faces:

- Globally distributed multinational and multi-product structures

- Hierarchical scale of operations

- Myriad, interrelated lifecycles of assets, infrastructure and applications – for example, buildings with twenty-year lease to applications with a 3 month lifecycle

- Diluted impact of project outputs and outcomes on business benefit realisation

- How do we integrate Agile methods?

Accelerated outcomes are not accidental. Only carefully tailored programmes – finely tuned project structures married to deep industry expertise – offer the guarantee of benefits realisation within the Enterprise project environment.

The Enterprise Programme Environment is the specific Enterprise context in which projects and programmes operate. In its widest context, this comprises the wider business environment, (Political, Economic, Societal, Technological, Legal and Environmental). More specifically it comprises the internal dimensions of structure, strategy, organisation and culture specific to the Enterprise.

1.3   Accelerated Change

Some of the world's most recognised enterprises have been able to accelerate change and deliver business benefit with support from PTS. It is a relationship that ranges from small 'experimental' engagements and specific interventions, through to strategic partnerships of greater scope and scale.

Whether at the level of the IT system, IT service or whole organisation, change is delivered through projects and programmes. That change can take many forms:

- Focused change – improving or accelerating progress to a specific Enterprise output

- Integration of Agile methods, tools, and techniques

- Supported change – using centralised best practice to support and guide projects and work streams

- Systemic change to the programme environment

- Enterprise-scale change – delivering with confidence a strategic outcome which accumulates business benefit through several areas of activity

This Prospectus explains how the EPPM services supplement Enterprise endeavour while accelerating desired change.

1.4 Components of a Solution
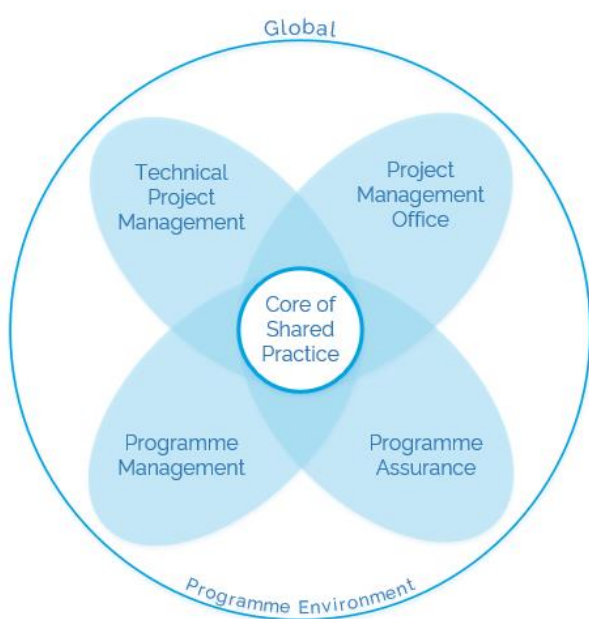
For such complex enterprise environments, PTS offers the services of its Enterprise PPM Practice; it is the product of forty years' experience and consists of four distinct but mutually reinforcing disciplines.

Technical Project Management – the discipline by which change is accelerated output by output

Project Management Office – the transient management vehicle to govern multi-method, multi-project environments with the greatest efficiency

Programme Management – the delivery of business outcomes from projects in combination

Programme Assurance – the reshaping of the project environment to retain and restore confidence in the change programme

These four are inter-connected via a **Core of Shared Practice** – industry best practice, PTS proprietary practice, standards, methods, disciplines, tools and techniques that can be leveraged over global projects and programmes to accelerate change.

The four services may be viewed as complimentary and aggregative.

Deployment of a Solution
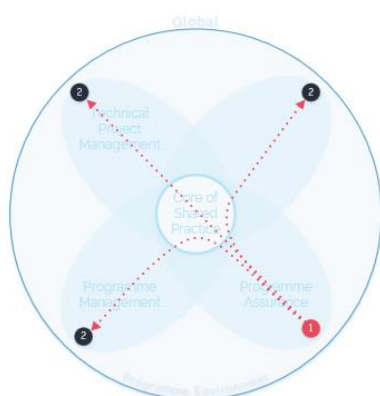
Depending on the change to be implemented, there are several pathways in which the Enterprise PPM services might be deployed. Four typical illustrative solution implementation 'pathways' are as follows:

Context: An enterprise seeks resolution to an identified problem in an existing project or programme and seeks an external intervention.

Pathway: Starting from a project intervention (project assurance), the enterprise builds out a local intervention. If this proves effective, the enterprise further implements wider remediations to existing projects, programmes or project office governance.

Context: an enterprise implements a solution to rolling out a major technology investment.

Pathway: Starting from professional programme design, the enterprise implements a high-level programme structure. This discipline is then brought into the Programme Office. If this proves effective, the enterprise commissions technical project management and programme assurance on an 'as-needed' or phased basis. The Programme is closed out through a reversal of this pathway.
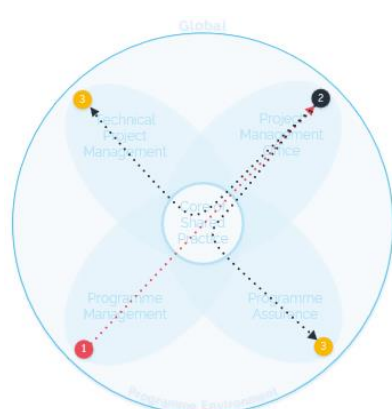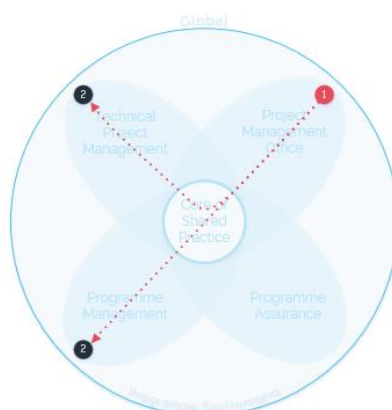

Context: An enterprise has the hypothesis that a project office function will provide an efficiency and control mechanism that more than compensates for a governance investment.

Pathway: Starting from a design brief or set of governance requirements, PTS Consulting creates a Project Office bespoke the enterprise requirements for unified reporting and standardised project practice. This might be on a 'try and buy' basis but if the standard prove the hypothesis, the service may be expanded into developing project and programmes. This might be sustained or ramped down over time.
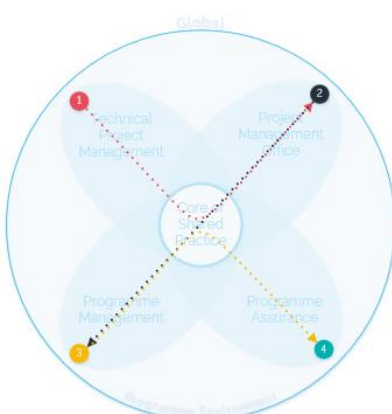
Context: An enterprise wants to ramp up and ramp down project capacity through a B2B provider relationship.

Pathway: Starting from a workstream being run under PTS Technical Project Management, the enterprise passes further projects to PTS on a 'try and buy' basis. If operationally successful, there is merit in deploying this capability though a project office structure and passing control of other project streams in line with capacity. This ramp up might extend to the programme and assurance levels. As the programme needs to ramp down, PTS phases out services in a sustainable and controlled way.

This pathway can be illustrated in a roadmap format as follows:

Technical Project Management

Programme	
PMO	
Project A	
Project B	
Project C	

Time

Technical Project Management brings together the Project Management and Solution Development required by the Project Scope. It is a service provided through a team of resources drawing on project and technology skills and a shared pool of practice. The accent of Technical PM is on creating delivering high quality outputs through the structured management of project scope, schedule, budget, risk, quality and human resources.

Project Management Office

Programme	
PMO	
Project A	
Project B	
Project C	

Time

Project Management Office (PMO) Governs, communicates and coordinates multiple Technology Projects where benefit can be derived from higher order management control. By aggregating the management across multiple projects, PMO aims to achieve the commonality of practice and economy of scale..

Programme Management

Programme	
PMO	
Project A	
Project B	
Project C	

Time

Programme Management Provides broader governance by controlling all related project tranche activity and transformation management, including change management activity and outputs, within a framework of activity to maximise outcomes. The performance of Programme Management is principally measured through business metrics and benefits supported by the performance of the PMO and projects under management.

Programme Assurance

Programme	
PMO	
Project A	
Project B	
Project C	

Time

Programme Assurance Is the provision of a set of professional operational levers to improve the quality, effectiveness and efficiency of projects and programmes. Programme Assurance activities include quality control, audit, project health improvements and governance interventions over the programme lifecycle for rapid remediation.

Key

Project Management	Solution Development	Management of Multiple Projects	Project Tranche Management	Quality Improvement
Technical Project Management		Project Management Office	Programme Management	Programme Assurance

1.5 Why do Enterprise Clients choose PTS?

The Enterprise PPM offer is framed by four signature themes, each of which resonates deeply with executives:

- Sensitivity to risk

- Delivery through IT Service Management Best Practice

- Assurance of regional or global scalability

- The character of Practitioners

1.5.1 Sensitivity to Risk

Though PTS clients sit in various industry sectors from finance through construction, government, health to education, all share an acute awareness of project risk, operational risk and reputation risk. Clients often conceive and craft projects as a direct countermeasure to reputational or operational risk. Having committed to embark on a project, our clients have a mature understanding that projects themselves are inherently risky. In fact, any project endeavour is not truly a project if it has zero risk. Risk management is one of the six principal management domains in any project, the others being scope, schedule, budget, quality and human resources.

Our clients also have a tacit appreciation of the risk of delay. Many enterprises function on an 18 month cycle of management attention. This 'executive heartbeat' confines projects to deliver outputs at speed. Delay risks diminished sponsorship and reduced quality of project output.

Clients understand the value at risk through performing a project as keenly as the value imperilled from neglecting to commence a project. Within this tension, projects are ideally conducted at speed using methods with scheduled quick wins within a schedule of risk-mitigating results and outcomes. The interplay of features, scope, time and money are as true of management thinking as they are of agile project methodology.

While PTS' Programme Advisory offer directly addresses the matter of risk through strategic interventions, our Project and Programme Management professional practice ensured every assignment is delivered through a Standard Project Delivery Process characterised by active risk management.

1.5.2 Delivery through IT Service Management Best Practice

Enterprise clients demand repeatable and auditable practice.

PTS applies its own competence in IT Service Management to its Enterprise PPM services. Technical PM is a mature service that has been in operation for many years and is continually refreshed to reflect emergent best industry practice, PTS' practical experience and the expectations of PTS' most demanding clients. PTS actively manages its capacity to deliver Technical PM and the availability of that capacity.

Projects are provided as a service. Each appointment comes with the warranty of service levels and the use of proven service management practices. These service levels and performance measures are established in our initiation documentation, specifically the Project Definition Report, all management and project products are maintained under a regime of formal Configuration Management, our professional work is visible through Work Performance Reports and works conclude with a summative Project Completion Record.

Whichever specific project method is used in any client appointment, that instance of the service follows a linear process from appointment, marked by a Project Definition Report through to the Close marked by a Close Record. The management products selected and used are managed as referenceable configuration items.

The majority of projects are adaptive, iterative and subject to progressive elaboration. These projects generally fall under the title of 'agile'. Change control is the essential discipline to support agile working and the Technical PM ensures that the project maintains control within an agile environment and agility within a controlled environment.

1.5.3   Assurance of regional or global scalability

Enterprise clients require assurance of supply. Whether in support of an individual project or a wider programme, Enterprise Clients value scalability. This means that any practice deployed in one project in one country can be performed similarly in another location with an assurance of consistency and scale. Likewise there are repeatable components and common characteristics shared across all technical appointments to larger programmes. Though important, this is more than simply tools and templates but the application of method in its widest sense, including operational practices, language and structures. Scalability requires the leveraging of Best Practice, whether that is industry best practice or the professional Proprietary Practice that PTS has accumulated over hundreds of technical assignments. In summary, this is the PTS philosophy, a Core of Shared Practice inter-connecting all project activity.

The EPPM services draw on a Core of Shared Practice. This core includes and combines industry best practice and PTS operational practice and learning.

The Industry Practice includes adherence to:

- Project Management Frameworks and Methods (PRINCE2, PMBOK, DSDM Agile PM and Scrum)

- Programme Management Method (MSP) and Business Benefits Realisation

- Best practice IT governance, including CoBiT

- Best practice Service Management, including ITIL

- Application of Business Analysis tools and techniques

PTS Operational Practice in IT Infrastructure includes:

- The Enterprise PPM Library - supporting files, tools, documents, templates, artefacts, situational responses, 'how-to' sheets, dashboards and standards created out of specific practice and maintained under configuration management

- Consulting Handbook to the Engagement Model and supporting techniques

- Enterprise PPM Benefits Model (systems – services – operations – business – society)

- Project Journals and Cases

- Proficiency in project software applications

- Standard Project Delivery Process- the Business process through which PTS delivers all projects

- Quality Management ISO9001:2015

- Information Security Management ISO27001:2013

1.5.4   The Character of the Practitioners

Projects are social constructs: great people make the difference and this remains a people business. Technical Project Manager is essentially a role which requires technical rigour, analytical ability, broad competence in Solution Development and the ability to lead the team. The Technical Project Manager is a qualified, experienced 'enterprise-class' professional working to a Code of Professional Conduct.

Enterprise clients have an expectation of Project Management borne out of current best practice. The Technical Project Manager combines specific technology domain skills and experience with Technical Project Management skills. As an empowered individual, the Technical PM can, at any moment in the project lifecycle, address the five major management domains:

- What is the scope, and is the project in scope?

- What is the schedule, and is the project on schedule?

- What is the budget, and is the project within budget?

- What are the main project risks, issues and the respective counter-measures in place?

- How project quality is defined, and is the project within tolerance?

If the above is seen as 'within expectation', there remains the sixth management domain; Human Resources Management. The Technical PM delivers the project through people, and this requires technical pedigree, industry experience, ability to transfer knowledge, emotional intelligence and an innate understanding of what is important at any moment in time. Failed communications and human interaction are a source of project failure; therefore PTS supports and coaches the Technical PM in their own skills and provides the management cover and escalation where necessary

2 | TECHNICAL PROJECT MANAGEMENT

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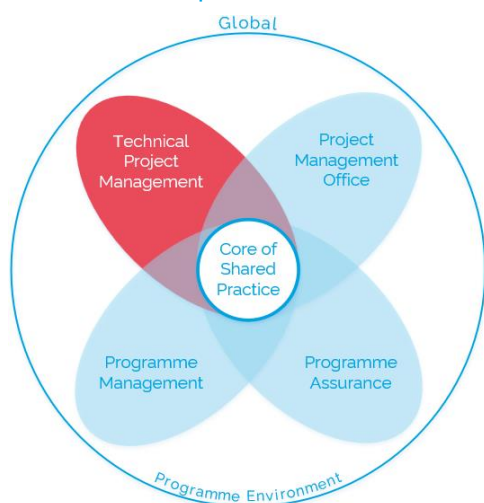
In each case, Technical Project Management is the provision of technical and project resources, methods and structure to deliver technical outputs. These outputs may be created in tandem with an Internal Project Group or on a standalone basis.

2.1 Service Objectives

The three objectives of Technical Project Management are to:

1. Deliver discrete technical projects within client expectations, scope, schedule, budget and quality

2. Deploy best practice in the creation of project products (outputs) and of the management products (auditable processes and decisions)

3. Support business change expressed though business benefit

2.2 Service Scope

Technical Project Management is one of four Enterprise Programme and Project Management services provided by PTS.

The scope of Technical Project Management couples the technical disciplines of Project Management to the technical disciplines of Solution Development to address the full capability required of technical projects.

Technical Project Management is a service provided through one or more dedicated human resources drawing on the shared pool of practice, with the accent of Technical PM being on the management of project scope, schedule, budget, risk, quality and human resources enabling projects to deliver the intended output.

Technical Project Management, individually or in combination with other services, provides a coordinating function to assist the CIO in delivering change

2.3   Service Description

The Technical Project Manager (Technical PM) has familiarity with project disciplines to deliver an agreed output within agreed expectations, scope, schedule, budget, and risk and quality parameters.

The Service applies standards-based project method within the enterprise programme environment. That method is likely to be indigenous to the Enterprise or, alternatively, require a standard such as Construction PM, PRINCE2, PMBOK, DSDM Agile PM or Scrum or a combination tailored to the environment.

The Technical Project Manager has familiarity with one or more of the technical disciplines of Enterprise IT infrastructure, including Data Centre systems, public infrastructure, intelligent building systems, cabling systems, network systems, communications systems, storage and server systems, desktop systems, Enterprise software applications, IT architecture, IT governance and IT service management.

Every project is delivered via the PTS Standard Project Delivery Process or framework.

2.4   When is Technical Project Management used by Enterprise Clients?

From experience, Enterprise clients use Technical Project Management service to serve one or more business objectives, including to:

1. Undertake specialist technical projects outside the skillsets of the Internal Project Team

2. Undertake specialist technical projects in order to free internal resources

3. Preserve confidentiality both internal and external to the organisation

4. Augment existing capabilities in the delivery of complex projects

5. Accelerate project delivery to meet deadlines and/or targets

6. Increase the auditability of project activity through performance baselines

7. Support Management Intervention, such as a quality baseline

8. Support a learning stimulus to inject new ideas into the Project Delivery (change agency)

9. Deliver a project work stream identified in an Enterprise Programme

10. Deliver the project works recommended by PTS as a professional advisor

11. Write Business Cases and Benefits Models

From experience, clients benefit from specifically identifying the one or more business objectives relevant to a specific project undertaking.

PTS therefore delivers Technical Project Management either a standalone service, alongside the Internal Project team or in combination with another PTS Practice. In any event the client is assured that a common set of standards and practices will be applied.

2.5   Summary of Benefits

Our philosophy is to find the right balance of the apparently divergent aims of flexibility and control. Multi-method (adaptive/agile) management allows us to offer 'Flexibility within Control' and 'Control within Flexibility'.

Delivering to expectation, scope, schedule, budget and quality is an absolute minimum requirement; in a carefully managed project, additional benefits ought to be acquired. Indeed, on an adaptive project basis, the benefits identified at the outset will evolve while the project is in flight.

While benefit is tailored to a given appointment, the following real-world benefits have been realised and provide instructive examples:

2.5.1   Project benefits

Deploying a Technical PM resource has many benefits including:

- Technical enhancements identified and realised during the project

- Trusted advisor for CIO or Sponsor

- Product documentation improvements

- Enhanced relationships with suppliers

- Increased efficiency of software licenses

- Knowledge transfer of technical skills and competence

2.5.2   Management benefits

- Challenge or stimulus to best practice

- Process documentation improvement

- Additional auditability

- Reduced operational risk (specifically reduced reserves held in insurance)

- Structured and unstructured coaching – 'Learning by Doing'

- Enhanced reputation of the IT management

- Knowledge transfer of management skills and increased management competency

3 | PROJECT MANAGEMENT OFFICE

3. PROJECT MANAGEMENT OFFICE

Enterprise organisations are becoming increasingly 'projectised'. This means that:

- The balance between business as usual and special projects is better understood

- Finance is often allocated between 'run the company' and 'change the business'

- Sophistication in building the transient management structures is needed for complex projects.

In practice, interim project management structures involve a combination of internal project resources complemented by market contracting. The Project Management Office (PMO) is such as structure now accepted as an industry practice for the projectised enterprise. Such a PMO might be enterprise-wide in its scope or stood up in response to a specific programme.

In either case, the PTS provision of a PMO is an established service available to enterprise clients. PMO is a management vehicle to accelerate change through fast start-up, established operations and timely close-out.

3.1   Service Objectives

The three objectives of PMO are to:

1. Operate and coordinate a transient management structure for the efficient operation of projects and programmes

2. Build and deploy best practice to generate the greatest value from projects and programmes

3. Maintain governance and adherence to best practice and standards of project delivery

3.2   Service Scope
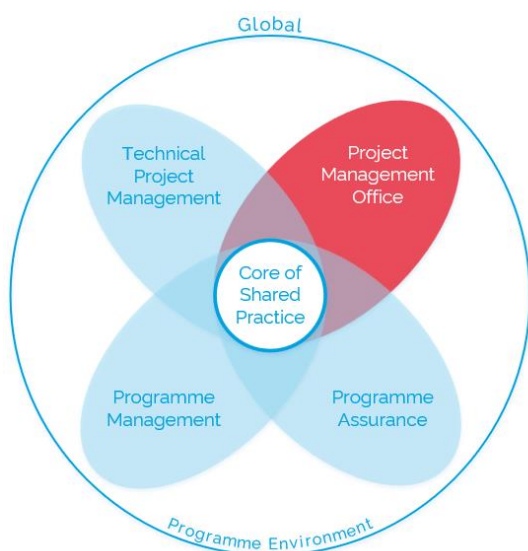
PMO is one of four Enterprise PPM services provided by PTS.

The scope of PMO is to control, communicate and coordinate the management function with oversight of multiple projects which benefit from an overarching management control. By aggregating the project management from multiple projects, PMO aims to achieve the commonality of practice and economy of scale.

All services draw from a shared pool of practice with the accent of PMO being on the management and communications infrastructure that enables projects and programmes to create their intended impact. PMO, individually or in combination with other services, provides a coordinating function to assist the CIO in delivering change through controlled activity.

3.3 Service Description

3.3.1 Governance and Control Structure

The PMO as a function coordinates technical and project resources, methods and communications to support the effectiveness and efficiency of projects and programmes. The structure may be created in tandem with an Internal Project Group or created to act on a standalone basis.

PMO is designed to serve a range of coordination and communications activities in line with the strategic aims of the Enterprise client. This could range from the provision of a single Project Officer, whose role is to provide administrative support for a single project for three months, through to a fully functional team coordinating a multiyear global IT infrastructure deployment and operational change programme.

PMO provides a range of operational activities to the extent required by the Enterprise client, including:
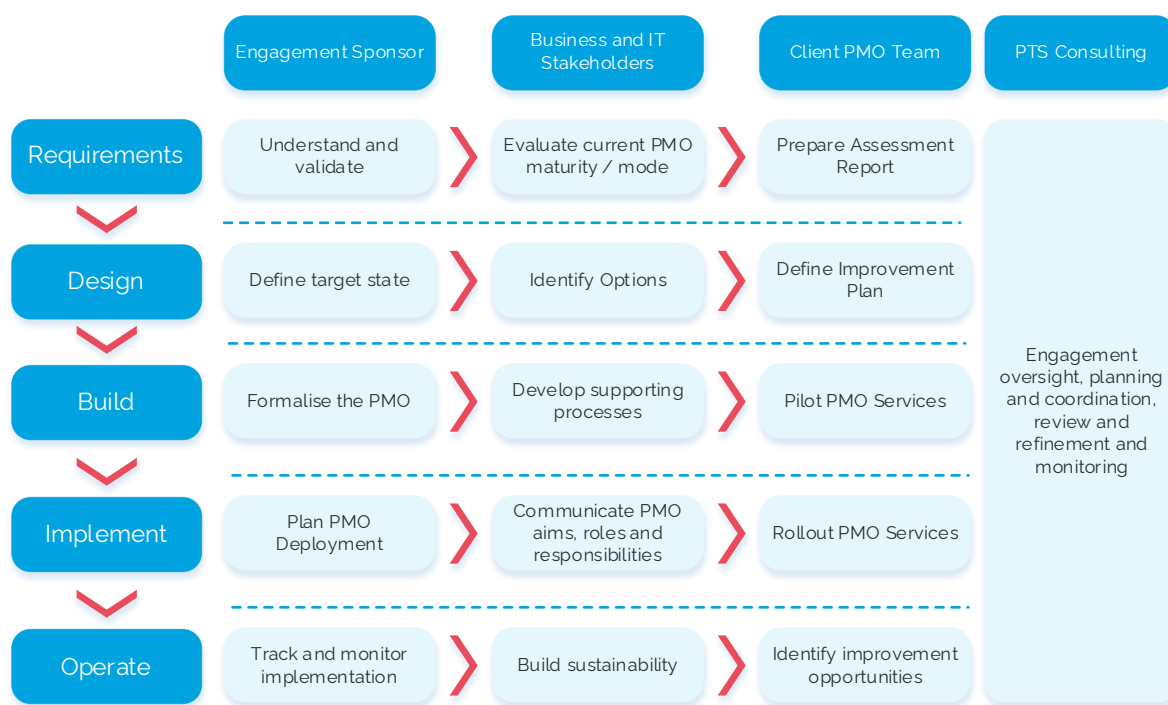
- Coordinating project administration, communication and quality

- Managing the centralised tracking and reporting of risks and issues

- Providing budget and resource profile management

- Scheduling and structuring regular review, including stage gates and project health checks

- Aligning projects with the objectives and benefits model of the Enterprise

- Providing coaching and training on best practice

- Managing learning and knowledge transfer activities

3.3.2 Design and Build of the PMO function

In addition to operating a PMO function, PTS designs and builds turnkey PMO functions that may be typically transient or permanent outsourced PMO. Design and Build applies both to a situation where a PMO does not yet exist, or where an existing PMO function requires enhancement, refinement or performance improvement.

Some clients need to rapidly create a Programme Environment in which the PMO brings the benefits of coordination, centralisation and common project processes. As the PMO is by nature a transitory organisational structure, a different set of disciplines are needed in its creation. PTS ensures that this function is built out for the organisation, starting with management requirements and the construction of a blueprint, or Target Operating Model, for the function.

The business case for change requires careful mapping to the Benefits Model and becomes a point of contention for many organisations. After Management mandate, the project environment can be designed and built out in a structured manner. Project Assurance uses a Requirements, Design and Build process.

	Engagement Sponsor	Business and IT Stakeholders	Client PMO Team	PTS Consulting
Requirements	Understand and validate	Evaluate current PMO maturity / mode	Prepare Assessment Report	
Design	Define target state	Identify Options	Define Improvement Plan	Engagement oversight, planning and coordination, review and refinement and monitoring
Build	Formalise the PMO	Develop supporting processes	Pilot PMO Services	
Implement	Plan PMO Deployment	Communicate PMO aims, roles and responsibilities	Rollout PMO Services	
Operate	Track and monitor implementation	Build sustainability	Identify improvement opportunities	

PMO functions within an organisation merit bespoke design and must accommodate a mix of internal and external staff, multi-method workstreams with a programme context and new forms of management dashboard.

Successful design and build will ensure that capability, knowledge and impact grows with the transient organisation but is retained as the PMO reduces size in the last third of its lifecycle.

The key human resources are PMO Lead, Project Analysts and Project Coordinators, specifically trained to function in these environments.

3.4   When is PMO used by Enterprise Clients?

From experience, enterprise clients in pursuit of change, use a PMO function in a variety of operational configurations and for varying durations. The PMO may contribute additional capability and capacity to the client's existing Project or programme Office.

For convenience, PTS recognises five generic operating modes for the PMO function. These modes might helpfully be seen as varying levels of operational maturity or facilitation of business impact. These five generic PMO archetypes or operating modes are:

- Mode 1: Project Support Office

- Mode 2: Essential PMO

- Mode 3: Defined PMO

- Mode 4: Strategic PMO

- Mode 5: Enterprise PMO

Each mode is aggregative, building upon the capabilities explicit in lower modes

3.4.1   Mode 1 - Project Support Office

Context: a short-term, single project or programme environment where typically one resource takes on Project Management tasks and management products without the need for a dedicated management tool. This provides:

- Control of scope, schedule and budget

- Elements of central progress reporting

- Risk and quality management

- Ad hoc templates and spread sheets

3.4.2   Mode 2 - Essential PMO

Context: a medium-term, multiple-project environment where multiple Project Managers are supported by a small PMO team. This provides:

- Overarching project information management reporting

- Project Management reporting and collaboration procedures

- Elements of project alignment to strategy

- Standards and repeatable governance structures

- Project Management methodology

- Use of configured 'out-of-the-box' EPPM tools

3.4.3   Mode 3 - Defined PMO

Context: a medium-term, multiple-programme environment where multiple Project Managers are supported by a dedicated PMO Lead and team. This provides:

- Coordinated stakeholder communications

- Monitoring of projects and people with consulting services or training

- Support mechanisms and infrastructure to support and govern a cohesive project environment aligned to strategy

- Joint decision-making and increased transparency

- Dedicated tools and dashboards to manage information

- Benefits realisation

- Feedback and lessons learned information

- Use of configured Enterprise PPM tools

3.4.4   Mode 4 - Strategic PMO

Context: long-term, multiple-programme environments across multiple business areas where Project Managers are managed and supported by a dedicated PMO lead and team. This provides:

- Coordinated stakeholder communications

- Monitoring and active support of projects and people through a consultative process

- An optimised portfolio factoring risk and aligned to strategy

- Coaching and training on best practice

- Active monitoring of the health of projects

- Transparency and joint decision-making by the wider Enterprise organisation

- Benefits realisation, decomposed into tracking of specific Key Performance Indicators (KPIs)

- Transfer of learning into the Enterprise

- Proposal of Enterprise architecture and standards

- Use of customised or highly configured Enterprise PPM tools

3.4.5   Mode 5 - Enterprise PMO

Context: a long-term, enterprise-level programme environment where Programme and Project Managers are managed and supported by a dedicated PMO Director and PMO teams. This provides:

- PMO as a centre of excellence to projects and programmes

- Best practice optimised for a long-range and continuous process

- Alignment to the strategic benefits of projects and the business mission and goals

- Analysis of project knowledge management system capabilities

- Benefits realisation and achievement of Critical Success Factors (CSFs) or KPIs at the centre of delivery

- Creation of Enterprise architecture and standards

- Understanding of advanced tools and knowledge management capabilities

- The capability to act as a centre of competence for other organisations

- Use of customised Enterprise PPM tools

PTS therefore delivers PMO as either a standalone 'PMO-in-a-box' function or as a capability deployed to augment an operational service alongside the client's internal team and other enterprise project functions.

3.5 Summary of Benefits

Delivering project administration, project communication, risks and issues oversight, budget and resource profiling, review, alignment, coaching and knowledge transfer is a given. This minimum output is acceptable but, in an operationally effective PMO, additional benefits ought to be acquired.

While bespoke to a given appointment, the following additional real-world benefits have been realised and provide instructive examples:

3.5.1 Technical benefits

- Acquisition of best reporting practice

- Consistency and improvement in product documentation

- One view of the project estate

- Technical enhancements identified and realised during the project

3.5.2 Management benefits

- More effective use of Programme and Project Management resources

- Ability to reinforce and provide stimulus to best practice

- Identification and redeployment of excess capacity

- Enhanced influence and reputation of the IT management

4 | PROGRAMME MANAGEMENT
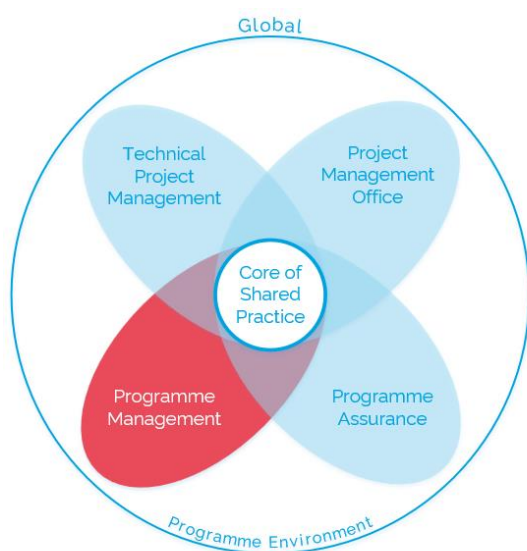
4. PROGRAMME MANAGEMENT

Enterprise change, whether at the level of the IT system, IT service or whole organisation, is delivered through structured programmes and projects. Programmes are the structures binding individual projects and their outputs to an outcome. Programmes therefore attract a range of skills, tools and techniques beyond those to manage projects with the focus being on outcomes. These outcomes may be business benefits in their own right or might be new capabilities that, in turn, foster business benefits. Programme duration is likely CIO-driven and its duration linked to the CIO future vision.

4.1 Service Objectives

The three objectives of Programme Management from PTS are to:

1. Design programmes of interrelated projects which benefit from collective management

2. Deliver programmes consisting of work streams managed by Technical PMs

3. Provide all IT domain expertise within the context of large enterprise programmes

4.2 Service Scope

Programme Management is one of four Enterprise PPM services provided by PTS.

Programme Management focuses on the management structures inclusive of Technical Project Management and PMO to deliver client outcomes.

While some programme methods suggest that programmes need not be time limited, PTS takes the approach that a programme, much like an individual project, benefits from closure as soon as possible. This supports the philosophy of Accelerated Change. Elongated programmes risk being absorbed into 'business as usual', diluting the impact of managed change. As an indication, PTS expects a programme to be delimited to two years' duration consistent with the 'transformation window' of most CIOs.

All services draw from a shared pool of practice with the accent of Programme Management being on the management of the programmes consisting several inter-connected projects or work streams. Programme Management, individually or in combination with the other Enterprise PPM services, provides an organisational capability to assist Enterprises deliver business benefits through structured methods.

4.3   Service Description

The general proposition for Programme Management is the provision of IT management capacity, methods and structure to deliver outcomes and, ultimately, business benefits. Most programmes have an IT dimension to which PTS contributes expertise and experience, often in tandem with a client's Programme Manager.

While concurrent projects may overlap, reinforce and complement, adding a programme structure is an approach aimed at realising the collective business benefit of these individual projects. Therefore, although projects do make up programmes, there is an additional layer of control at the programme level which requires a method beyond that within Project Management.

Not all Enterprises have formal programme methods. In this situation PTS uses the process and method described within Managing Successful Programmes (MSP). This method addresses the programme lifecycle through iterative and interrelated steps known as the 'Transformational Flow', which consists of the following:
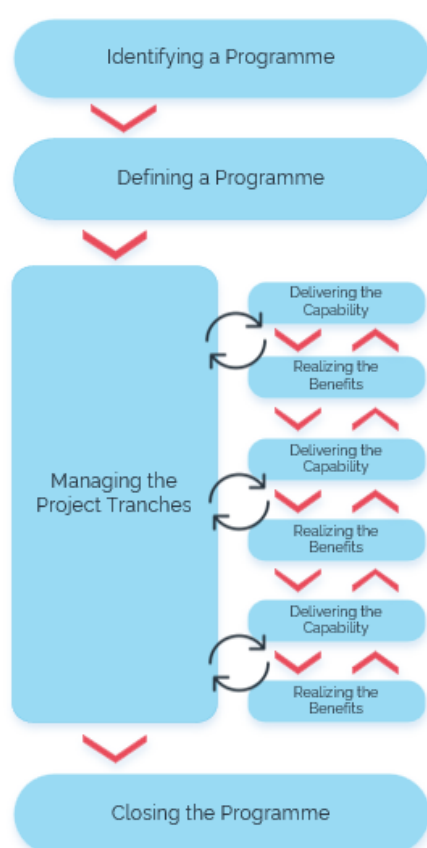
- Identifying a programme

- Defining a programme

- Managing the project tranches

- Delivering the capability

- Realising the benefits

- Closing the programme

The Programme Manager has a deep familiarity with programme methods and disciplines to deliver outcomes from a combination of interconnected projects. This they perform by utilising domain skills in governance; programme organisation, visionary leadership, stakeholder management. Benefits management, blueprint design, benefits mapping, business case creation plus risk, issue, quality and assurance management.

The Programme Manager also has familiarity with one or more relevant disciplines of Enterprise IT infrastructure, including IT architecture, governance, risk management and service management.

4.4   When is Programme Management used by Enterprise Clients?

From experience, enterprise clients use Programme Management in order to experience a variety of business benefits through structured change contexts, including the following:

- Support of existing programme management

- Transformation – where specific benefits of agility, accountability, auditability, operational risk reduction and delight the customer are sought

- Service Management investments

- Technology integration – pre- and post-merger

- Multi-method workstreams

- IT governance initiatives

- Introduction of Project Management

- Construction programmes – IT aspects

- Office relocation programmes supporting Construction Programme Management

- Situations where PTS is appointed as a Project Manager but the works would be more effectively completed as part of an integrated programme

PTS therefore delivers Programme Management as a standalone management service, or as the delivery vehicle for other PTS Practices. In either event, the client is assured common standards and practices will apply.

4.5 Summary of Benefits

Delivering outcomes from a business case is a given. This minimum output is acceptable but, in a carefully managed Programme, additional benefits ought to be realised. Specifically, the public profile of a Programme provides wide and diverse exposure into the client organisation. This allows the Programme Manager to make connections and identify root causes elusive to operational staff, or to identify opportunity for improvement that would otherwise fall between the gaps in the fabric of the organisation.

A Programme Manager alert to the priorities of the Sponsor has a powerful agency role which rarely exists to a permanent staff member and is in many cases therefore able to ask the deep questions of operational IT and its prevailing way of working.

4.5.1 Bespoke Programme Build

PTS builds turnkey programme environments providing a structured set of professional resources that span multiple stream of professional endeavour and the backfill needed when existing enterprise staff are called out of Business as Usual into the Programme. The staff mix provided from PTS is likely to consist a blend of full time resources supported by contracting resourcing secured through our Resourcing function. We see this through the anlaogy of the regular army supported by a reserve force; both trainin the same way, use the same tools and operate under common management. Of course, enterprises can contract direct with the freelance market but fail to achieve the warranty of resilience provided by PTS. The bespoke programme build can include recruitment, coaching, higher education and lifecycle management.

4.5.2 Examples of Additional Program Benefit

The following real-world examples have been realised for our clients and provide instructive examples:

- Knowledge transfer of technical skills and competence

- Ability to reinforce and provide stimulus to best practice

- Process documentation improvements

- Additional auditability

- Reduction in operational risk

- Structured and unstructured coaching

- Enhanced reputation of the IT management

- Alignment of other projects in flight

- Identification of cross-border efficiencies

5 | PROJECT ASSURANCE

5. PROJECT ASSURANCE

That the Enterprise Programme Environment is in constant flux is not a surprise. Projects and Programmes by definition are dynamic and transient 'change the company' management structures. The forces of 'business as usual' can assert a stasis on programmes that is at best unhelpful and at worst a new form of insidious operational risk. In extreme cases, the Project Method can itself become a risk and actually impede the changes that it was intended to enable.

These pains in the project environment are evidenced by symptoms of process failure, poor quality and mismatch of delivery to elevated stakeholder expectations. Robust and sensitive project interventions are a helpful tool at this time. Enterprise PPM has a number of project interventions and project remediations collectively known as Programme Assurance.

Interventions suggest a corrective action, refactoring or remediation. More traditional measures focus on getting the governance structures right. Conversely an enterprise can be frustrated by excessive stage gates and review boards such that informal workarounds are created by employees. Every Board or Governance body benefits from a simple Charter that explains its unique purpose, its membership and its modus operandi.

Not all Project Assurance is 'interventionist' or 'medicinal'. Actually standing up, structuring and implementing governance controls within a new programme environment itself requires the consulting input of an assurance service. Assurance addresses other programme governance arrangement precipitated by situations of merger, acquisition, outsourcing, insourcing and other major business transformations.

5.1 Service Objectives

The three objectives of Project Assurance from PTS are to:

1. Assure the governance integrity of the enterprise programme environment

2. Provide audit, assessment, inspection, obstacle-removal and health checks of projects and programmes

3. Perform on-going quality assurance throughout the programme and project lifecycle

5.2 Service Scope

Programme Assurance is one of four Enterprise PPM services provided by PTS.
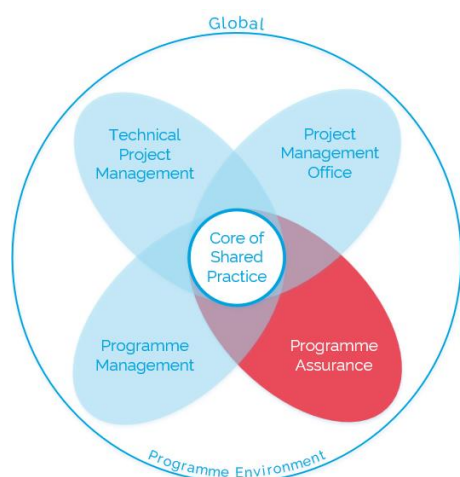
While Technical Project Management, PMO and Programme Management are essentially 'execution services', Project Assurance is 'consulting about projects' and a consulting input into projects and programmes. The scope of Project Assurance includes individual projects, project offices and programmes but also addresses the overall governance of the environment in which projects and programmes take place.

Assurance characterises any PTS project. In addition to the client experience of the project, the set-up, maintenance and close of every project monitored and quality controlled is internal to PTS through internal control mechanisms. Any

project PTS performs as internal development or investment project goes through the same degree of rigour as an external project. This 'double checking' provides general assurance to clients. Beyond general assurance, PTS has available a range of interventions that are appropriate at different points in the project, PMO or programme lifecycle.

All services draw from a shared pool of practice with the accent of Programme Assurance being on specific or systems interventions which enable the Project environment to be better governed, more effective or more efficient. Project Assurance, individually or in combination with other services, supports the CIO to in the delivery of change.

5.3   Service Description

Programme Assurance is the provision of a set of professional operational levers available to the CIO or Sponsor which improves the quality, effectiveness and efficiency of projects and programmes.

5.3.1   Programme Environment - Design and Build

In addition to operating project environments, PTS has the capability to design and build a project environment, comprising a central coordinating PMO governance function and Programme and Project operating models.

Creating a Programme Environment is a technical project in its own right. Commencing from a client-agreed blueprint – often called a Target Operating Model – the environment is conceived, tested and verified. This strategic work utilises PTS' experience in delivering Business Transformation for clients, which goes beyond the PTS Core of Shared Practice within Enterprise PPM.

This set of structured activities is specified in a 'Design and Build' method statement, which is applicable to an Enterprise project environment including those characterised as Operating Modes 2, 3, 4 and 5 in the PMO Service Description.

'Design and Build' applies both to a situation where the PMO role has not yet been created, or where an existing PMO function requires enhancement, refinement or performance improvement.

5.3.2   Project Quality Assurance

Independent Project Quality Assurance is a standard project role. The Assurer acts independently from the project team, to provide a 'sideways' look at project performance. The appointment of Project Quality Assurance may be from the CIO or from a related party such as customer of the project products. A successful appointment requires that project quality tolerances have been established as a baseline.

Likewise, Solution Quality Assurance requires that product quality tolerances have been established and requires the Assurer to have a span of knowledge appropriate to the solution under development. Project and solution quality are often related and certain project approaches, methods and practice will be more appropriate to specific solutions under development.

5.3.3   Project Intervention

Project Intervention means an active injection of remedial action into an in-flight project. This may be at the invocation of a Programme Manager or be triggered in response to a threshold breach. Project Intervention is not solely an emergency measure; it may be appropriate to assert additional control, supply resources rapidly or scale up to meet a specific deadline. Its purpose is to preserve value and project integrity.

Project Intervention is analogous to a fast-track emergency change in the ITIL framework for IT Service Management. Project Intervention reinforces project control, and the right to intervene reinforces project control. In cases where the business case is no longer valid, the result of an intervention is early project close.

5.3.4   Project Audit, Inspection and Assessment

A Project Audit is a retrospective assessment of a specific project or programme, or of the Project Management Office. Project Audit may be part of a programmed sweep of projects in order to check compliance to project process and validate that projects are managed robustly in respect of scope, schedule, budget, quality, risk and human resources. The purpose is to reinforce value and programme integrity.

Project Audit uses repeatable templates to ensure that:

- Projects are audited using a consistent method

- Proposed improvements are evidence-based

- Recommendations are achievable.

The results of this audit feed into Project Knowledge and should inform all projects that are underway within the Project environment.

Audits are typically performed at Project or Programme Close, though this need not be the case. A retrospective review has value at any time during the Project Lifecycle and may be programmed into the project process for longer-term programmes.

Project Audit is analogous to Continual Service Improvement in the ITIL framework for IT Service Management. Project Audit supplements the continual learning philosophy that should interweave projects and programmes.

A programme environment may maintain an audit function as a safeguard from, or a counterbalance to, an Internal Audit function. In the PRINCE2 method, this is known as Quality Assurance and operates with some independence of the project.

5.4   When is Project Assurance used by Enterprise Clients?

From experience, enterprise clients seeking to 'right-size' to meet programme commitments may lack resources for anything other than preserving the status quo and keeping the project environment running. The Guide to the PMBOK (Project Management Body of Knowledge) identifies this as a Level 4 Risk – specifically when a firm's own methodology becomes the risk. It may therefore be prudent to reserve an option on specific tools that can both stimulate positive change or provide remedial help when change is imposed on the project environment.

Programme Assurance Service contributes both capability and capacity and provides a set of operational levers. It is a means by which a judicious investment or small intervention can have a disproportionately positive impact. For illustration, and from practical field experience, below are some situations in which a client may benefit from the tools of Project Assurance.

5.4.1   External Validation – doing things right

A frequently reported challenge is that the governance and standards adopted varies across projects, and that a standardised framework which can flex across the range of projects is needed.

Validation ascertains whether the client's project team is structured, operating and delivering according to internal process and procedure or to external best practice. Validation can be performed at the project, programme or PMO level. An internal Audit may provide this function, or Project Assurance can provide an external assessment that has the advantage of external accountability.

5.4.2   External Verification – doing the right thing

Another frequently reported challenge is that clients do not have a consistent overview of a portfolio's health. The solution is often a framework of regular reviews, including stage gates.

Verification moves beyond validation by asking whether the client's Project team is structured, operating and delivering in a manner most conducive to achieving business benefits. Verification therefore usually happens at the programme and PMO level. A Verification Report is a stimulus for change or realignment of resources.

5.4.3   Project Feasibility and Initial Business Case

A Feasibility Study determines whether a proposed project is actually feasible; it is therefore a specific form of verification. A Feasibility Study is a small project in its own right and sometimes called the 'pre-project' project. A Feasibility Study of a complex project or programme will result in a confirmed scope, schedule and budget. The output may be an Initial Business Case with indicative financials to a level of accuracy providing confidence in a go/no go decision. Alternatively, the output may be the Programme Management Brief. It is essential however that the output enables the management decision to proceed.

5.4.4   Due Diligence

Clients sometimes require an independent view on the structure, operation and performance of external providers who are delivering transition or transformation projects in support of fulfilling client requirements. This due diligence supports the client's decision-making process and is conducted against the client processes and procedures or external best practice checklists. PTS acts as the trusted advisor in this situation thanks to its independence in relation to both the client and the provider.

5.4.5   Specific Challenges of Agile Projects

Increasingly the agile techniques of feature-flexible projects using the technniques of product backlogs, time-boxed delivery cycles, fail-fast, progressive and emergent delivery of product and high visualisation of process are being used to serve development projects outside the traditionla realm of software cretaion. These projects often have characteristics associated with product development and some are experimental ventures that might be suspended early but the high Cost of Delay encourages enterprises to perform 'experiemental projects'. PTS encourages the use of agile methods especially the push effects of Scrum and the pull style of Kanban – both offer useful tools but, more importantly, encourage a way of working that is free from fear and accommodates experimentation. Gartner has identified Mode 2 IT as an enterprise form that fosters agile working and PTS is able to provide project assurance in this area. Sometimes we find that suspending traditional project control disciplines is unhelpful and these still have a role to play in project assurance. When an internal Development Team works co-creatively with PTS technical staff and facilitators, a useful synthesis of talent can reduce development queue time and foster external scrutiny.

5.4.6   Sponsor and Stakeholder Education

The Sponsor has specific project education needs that are beyond standardised 'bootcamp' based training and go straight to the centre of project governance. PTS provides an individual or small group environment and

education structured directly to the sponsor's and senior management's needs. The training will likely reference public methods such as PMI, PRINCE2, DSDM Agile and Scrum in addition to any proprietary methods, tools and techniques in place locally. The application will be highly focussed on the most critiical practical areas of scope, schedule, budget, quality, risk, resourceses, change and benefits. The training will include practical but challenging, thought-provoking exercises. This education is based on PTS own internal education programme so is well proven with demanding professionals.

5.4.7   Project Learning

It is often the case that project lessons are not learned, which means that the organisation fails to improve practice. One solution is to set up a PMO as a custodian of learning to ensure that these lessons learned are continually and consistently adopted in the governance structure. To PTS this means the application of solid Service Management practice to the project service. In many instances, senior management mandates a role for an independent professional assessment. In the PRINCE2 methodology this role is described as Project Quality Assurance and is a useful way of identifying risks not evident to the client. Occasionally, clients suffer from a Tier 4 risk; in this case the project method itself is the source of risk. An external agency is often better positioned to observe such systemic structural risks and advise countermeasures.

5.4.8   Change Management

Change is a key project theme and determines the very method of the project. PTS distinguishes adaptive project management where change is facilitated but not mandated from agile project management where change in the product is expected and encouraged. Selecting the right project method is therefore a critical decision as changing method in flight risks lost time and destabilisation.

Further, once in-flight, change becomes a dominant management activity. Without differentiation, in the change management regime, a request for a small change to a project product specification or a project process might be treated in the same manner as a large change request. This is ineffective and a hierarchy of change is desirable. Too many layers of controlled change and inefficiencies from delayed decisioning can occur. In some projects the cost of lost time increases as the project moves to a conclusion. Right-sizing change management is a critical expertise that Programme Assurance can supply.

5.4.9   Visualisation of Project Performance

Project reporting is the subject of much contention in enterprises. By the time a report for executives has been distilled from low level workstreams through a mid-tier of management through the the highest level, the nuanced early warning data has been so diluted to become useless and worse, can mask important developments that are in waiting. Many process or workflow projects include multiple states through which work must pass – this is especially true of data centre infrastructure works and large installation/decommissioning projects. PTS believes that some of the visualisation techniques that have been surfaces by agile practices such as Kanban product economics working are valid and relavant to a suite of repetitve project types. Cumulative Flow Modelling is an especially promising visualisation that serves many purposes though principally the managemnt of project flow; has quickly total work passes through a programme.

5.4.10 Project Financing Advice – 'Value for Money'

For many years the press has lamented 'project failures'. Project financiers often require assurance that a programme is both achievable and likely to return the benefits upon which the Business Case is based. This can happen prior to signature or mid-term. This type of assurance requires an analysis based on empirical evidence, but also on the tacit knowledge of the programme environment which PTS has acquired.

PTS will identify factors either understated or not recognised at all. The likely analysis will answer the question: 'is the financier's return likely to be in line with the business case?' The final output may be in the form of a Value for Money (VfM) report – especially if it is a retrospective. As either an intended or unintended side effect, the injection of Project Financing Advice stimulates or activates a healthy reactionary response for the Project Provider.

5.4.11 Aligning Project Office with the Programme Environment

In many programme environments, the value of the PMO is underestimated or not fully recognised as a source of advantage. Project Assurance services ensure that the PMO is not merely seen as a clerical function by highlighting where and how it adds value, and guarantees that changes are made to realise this value.

The Enterprise PMO function has a lifecycle throughout which its size and complexity will change. What will not change is the management expectation that the PMO will become a more mature, value-adding component within the Enterprise architecture.

In order to realise business value, PMO requires an operational maturity befitting its purpose. Project Assurance advises on PMO structural and operational adjustments to achieve this alignment. This may require the use of additional tools and dashboards or a greater accent on stakeholder management.

In many instances, there is uncertainty as to whether a PMO is 'right-sized' for an organisation. In many clients the PMO operates functionally as the Project Office when in fact the project environment actually requires a stable PMO.

Conversely, a highly sophisticated Strategic PMO function deployed within organisations that have insufficient maturity to use its services efficiently and the PMO becomes entrenched in strategy work and fails to support projects on an appropriate basis. In this case, the PMO should be right-sized downwards. Any misalignment between the project environment and the PMO will result in wasted energy and inefficient investment.

5.4.12 Development of Portfolio Management

The Enterprise PPM services are predicated on the desirability of accelerated change. Programme Assurance in particular is concerned with strategic intervention and structured change of the Programme Environment. One of our larger clients' most significant developments and changes is the creation of a Project Portfolio. Portfolio management places less emphasis on accelerated change and more on gaining efficiency from managing several projects under a shared framework as a managed service.

Central to the portfolio concept is then segmentation of project types and a typical segmentation is based on a matrix of project strategic value and project complexity where different quadrants require a different management posture.

PTS assists with the design, build and operation of as portfolio approach and take on management of portfolios.

PTS itself runs about 400 concurrent projects across the fleet of clients and therefore applies portfolio techniques with respect to internal resourcing, reporting, tracking and scheduling. This intensity is at parity with the largest enterprise organisations.

5.5   Summary of Benefits

Various operational benefits have been realised in real-world examples:

- Identification of risks transparent to the client organisation

- Accelerated start to projects

- Effective and efficient project change management

- Insight into the health of projects

- Accelerated closing of projects mid-term as required

- Integration of Project Learning into the project lifecycle and speed to realised benefit

- Acquisition of best reporting practice

- Dashboards optimised for the programme environment

- Improvements in process documentation

- Clear visibility of the financial value of the Project Management Office

- Understanding how projects and programmes can work in a Portfolio

- Appropriate programme governance structures.

6 | GLOBAL SCALE

6. GLOBAL SCALE

From the outset, Enterprise PPM was designed for regional or global scalability. The practice, ideas, frameworks, concepts, tools and templates that are relevant in Sydney must be equally relevant and applicable in Singapore. The decision support spreadsheet must be as easy to use in New York as in Amsterdam. This knowledge must be available at speed to support the central premise of Accelerated Change. This is the essence of pooling and sharing practice at the heart of the Enterprise PPM proposition. The Core of Shared Practice is the supporting knowledge infrastructure.

6.1 Support Objectives

The objective of the Core of Shared Practice is the frictionless movement of knowledge and practice within and across global client environments.

The Core of Shared Practice as a model for scalability comprises the three aspects of:
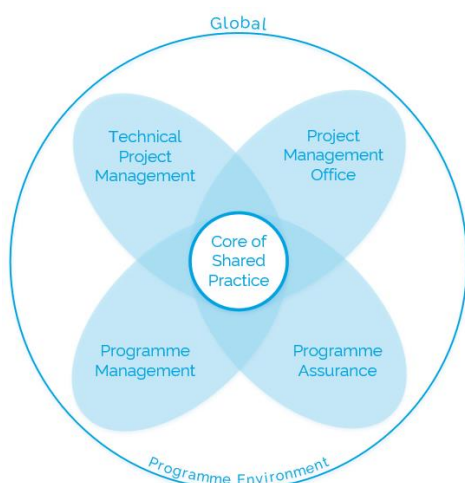
1. PTS global standards

2. Industry recognised body of Best Practice

3. PTS body of Proprietary Practice

This knowledge is managed on a social paradigm that reflects pooling and sharing. The four Enterprise PPM services feed from, and contribute to, this Core of Shared Practice through the practice of practitioners and consultants moving across different operational contexts and varying assignment types.

While many enterprises have captive project and project office functions, the Core hosts the experienced-based knowledge that PTS, as an external provider, will cycle in fresh ideas and practice from other environments cycled through the Core of Shared Practice.

6.2 Components of Industry Best Practice

Enterprises demand the use of Best Practice for very practical reasons:

- Relevance and applicability in the majority of instances and contexts

- External verification and accountability

- Sustainability

- Reinvention avoidance

PTS draws on a number of reference sources of industry Best Practice including published methods:

- Adaptive methods such as PRINCE2, PMI and Construction Project Management

- Agile methods such as DSDM Agile Project Management, Lean and Scrum

- Programme methods such as Managing Successful Programmes, P3O and PMI Program Management

- IT Governance standards and practices including COBIT-5, TOGAF-9 and ITIL-3

6.3   Components of PTS Proprietary Practice

PTS has areas of specific shared practice which have been built up over more 40 years of delivering Project services, and are continually refined. These include:

- Low-level 'cookbook' of procedure and practical guidance for project personnel

- Delivery Policy, Delivery Process and quality standards

- Project Management Work Performance Data and Heuristics

- Body of delivered project work, industry liaison and Higher Education engagement

- 'Interview Season' where industry leaders are quizzed on professional developments

- PMO Express – an immersive six-week instruction programme to train Project Coordinators and Project Analysts

- Access to, and guidance from, seasoned professionals

6.4   Knowledge Management

6.4.1   Knowledge Base

Enterprise PPM practice adheres to the current project management practice of distinguishing project management from solution development. In this way, Project Management stands with its own technical disciplines, tools, techniques, lexicon, books of knowledge and tacit knowledge.

PTS asserts that this distinction is essential to preserve the technical nature of Project Management as a set of distinct enterprise-class management competencies and to prevent erosion (commoditisation) of the value of Project Management. While general project management might be a fungible (easily substituted) resource, the Technical PM remains a valued project specialist.

In actual delivery, a client might experience PTS project management and solution development as a coherent whole. In fact, DSDM Agile Project Management contends that effective solution development only happens within the appropriate project management structure. PTS concurs with this and places value on project management and solution development as separate but tightly connected professional disciplines.

At the same time, PTS specialises in a number of ICT, service management, IT governance and business change disciplines and knowledge areas each with their own unique language, lexicon, tools, techniques, books of knowledge and domain knowledge.   These knowledge domain act orthogonally - project management knowledge and industry domain knowledge, while different, help accelerate change and build solutions, taking us in the same direction of travel. In fact, our clients value our ability to hold conversations across these boundaries as it reduces the number of professional parties that need to be employed on specific programmes.

The Knowledge Base, its maintenance, education and communication, is managed by Project Coordinators or Project Analysts who inject project learning through project closure and sustained industry research.

6.4.2   Knowledge Leverage

The Enterprise PPM Library is architected on a principle of create once / use often. The products and content created are real-time, metadata-tagged using a knowledge indexation as follows:

- Function: standard, schema, reference, drawing, process, policy, template, example, guidance and experimental

- Project Method: Adaptive and Agile

- Lifecycle: Pre-Project, Initiation, Delivery, Close

- SFIA category: PJMT, PGMT, PFMT and PPPO

- Practice: Data Centre, Built Environment, Transformation, Technology Innovation

- Format: MS Office, MS Visio, MS Project, MS PowerPoint, Adobe PDF, BPMN2.0, CAD and BIM

- Geographic format: Australia, Singapore, Hong Kong, Philippines, Japan, UK, UAE, Canada and US

Using an enterprise-class social platform allows both conventional library morphology while encouraging social and co-creative development. This platform of managed knowledge enables the following capability for client leverage:

- Project documentation with value adding social and professional contribution

- Rapid knowledge upload, discussion, refinement, publishing and compilation

- High iteration release management cycles

- Rapid training course development

- Support for ISO 9001 quality requirements

- Support for ISO 27001 information security requirements

To multiply value, project expertise, ideas, learning and knowledge should be transferable across domain boundaries of geography, industry sectors and project type. Clients invariably welcome ideas and practice acquired from alternative sectors, geographies and technical domains. The Shared Practice makes this 'value-add' possible.