

bulletin

news from CITI – partner in change

are you
free?

suitability
is far more
important than
availability

by **Dr Christopher Worsley**

CEO: CITI

good practice is lost. The second is that the importance and status of resource management is not recognised – being regarded as ‘pay, rations and pastoral care’ rather than a fundamental, critical portfolio management discipline.

satisfactory solution

Of the many factors to be integrated into a final satisfactory solution the following five are ‘must-haves’:

- Identifying and managing golden or scarce resources as corporate assets
- Holding a dynamic KASE profile of individuals who are in technical and management roles
- Having a mechanism for matching resources to the particular capability demands of the projects
- Maintaining details on managerial and technical personal aspirations
- A forward resource demand schedule for a rolling three months for these types of resource.

Having the information is important, but without management processes, it is just expensive administration. As the allocation of resource is one of the six fundamental sources of power – and everybody intuitively knows this – there must be very clear separation of accountabilities and responsibilities between and amongst the powerbrokers in the project community. This will involve directly addressing the Gordian knot of entangled interests that exist between portfolio management and project governance groups (project boards and project selection committees), project management offices, projects and the resource owners. And, it is essential that the resultant process is ‘lean’; any delay created by bureaucracy in allocating resources immediately invalidates it! I said it wasn’t easy – but the rewards are great!

Can it be done? Has it been done? Yes it can and has been implemented with considerable success. But, it requires that organisations come to realise how important implementing a resource forward demand modelling process that ‘matches’ and ‘stretches’ key resources to projects is, and often this realisation comes after experiencing the apparently expedient but ultimately destructive approach of allocating by availability and ignoring abilities and aspirations.

One of the most rewarding problems to solve is properly and appropriately resourcing your project portfolio.

Not that it is easy, as many factors shape the solution, and it is dynamic, with good current solutions decaying, sometimes quite quickly, into poor ones. Nevertheless it is worth the effort, as compelling research evidence backs up everyday common sense in proving that the choice of personnel on a project has more impact on its successful conclusion than any other.

In its simplest form, the problem boils down to identifying the suitability of a resource and its availability, and even though suitability is by far the more important, it is availability that most frequently determines allocation. There are two reasons why this unsatisfactory state of affairs arises: the first is when for extended periods of time the demand for project resource so outstrips supply that the monitoring and custodianship of

leading the w

The economic turmoil of 2009 made a dramatic backdrop to the commitment The Co-operative Financial Services has made to becoming the UK's most admired financial services business.

Through the merger of The Co-operative Financial Services and Britannia Building Society – two values-driven, customer-owned businesses – the UK gained a diversified 'supermutual', uniquely positioned to offer a member-owned, customer-led and ethically guided alternative to the shareholder- or government-owned financial services model.

With a joint holding of £70 billion of assets, nine million customers, 12,000 employees, 300 branches and 20 corporate banking centres, The Co-operative Financial Services is a major player, and the Board and the new leadership team have wasted no time in creating a shared corporate vision and set of values, putting an integrated senior management structure in place to reflect this.

Mergers cause enormous organisational change, and that means projects, lots of them.

With the organisation embarking on a three-year transformational change journey The Co-operative Financial Services Functional Leader,

by **Steve Hall**, Functional Leader, Delivery and Portfolio Management, The Co-operative Financial Services, **Peter Collin**, Principal Consultant, CITI and **Susanna Mitterer**, Sales Consultant

Delivery and Portfolio Management, Steve Hall, knew that successful project delivery depended on highly capable project managers working in a close and constructive partnership with knowledgeable project sponsors. He called upon the expertise of CITI to help make this happen.

following a direction

"With a large portfolio of projects ahead of us," commented Steve, "we wanted to ensure our leadership team were supported and enabled to take on their change leadership role and deliver benefits on behalf of our customers. What I wanted," said Steve, "was a series of short but engaging briefing sessions, delivered by recognised experts, to allow sponsors to understand their roles, responsibilities and successful behaviours, to effectively challenge and diagnose project performance, support risk management and manage issues and understand how to get the best from their project managers."

Perhaps more than in any other senior management role, the skills, behaviours and attitudes required to successfully sponsor

projects, knowing when and how to challenge, when to be supportive, when to become directive, is essential. Basing decisions on benefit-risk analyses that themselves are derived from project monitoring reports is not a skill many business managers have to acquire – unless they are sponsors of projects. Through introducing best practice approaches to sponsorship, and by providing evidence and insights as to what works and what doesn't, CITI has, in the words of Steve, "given our sponsors immediate confidence and control in their role". Throughout Q1&2 of 2010 CITI delivered a series of sponsor briefings to the executive board, business leaders and functional leaders who are directing the transformational change programme.

the result

The Co-operative Financial Services has continued to flourish, delivering impressive financial results for 2009 despite the recession, creating both an ethically distinctive, but highly competitive, force in the financial services sector.

Jon Marchant, Business Leader, Change Management, remarks: "Without the right leaders, managers and staff to drive change, and to deliver the business benefits, the expected synergies from the merged businesses will be lost. The open-mindedness and enthusiasm shown by all is undoubtedly a core strength

what's going on in the next few weeks?

2010 CENTRES OF EXCELLENCE CLUB MEETING

Date: 24th June 2010
Times: 10:30 to 16:00
Venue: 39 Victoria Street, Westminster,
London SW1H 0EU

The twentieth meeting of the Centres of Excellence Club (CofEe Club) will be convened on the 24th June 2010 at Selex Systems Integration, part of the Finmeccanica Group, London.

The topic for the day is **Contracting for success**. Does your organisation use third party suppliers to produce project outputs? Do you know or care if they subcontract out to other suppliers? Are you in control of the contract? Do you believe you are transferring risk to the supplier(s)? The June meeting of CofEe Club will discuss these and other issues. It will separate out contract requirements from product requirements and will look at factors to do with successfully managing each of these.

In one of the sessions on the day construction of Tate Modern will be used as a focus for discussion, through video clips and workshops. CITI is privileged to have worked with the producer of the original 'fly on the wall' TV documentary, and have access to non-broadcast materials. The emphasis is not on the legal niceties of the contract, but on the working relationships between the various parties.

CofEe Club is an invitation-only, membership-based network of like-minded professionals, of senior individuals with responsibility for projects, programmes and portfolios in their organisations. If you are interested in becoming a member please email Amanda Muscat at amuscat@citi.co.uk.

2010 INSTITUTION OF CIVIL ENGINEERS

Date: 8th July 2010
Times: 18:00 to 20:00
Venue: The Milford Hall Hotel,
206 Castle Street, Salisbury SP1 3TE

At the next meeting of the Institution of Civil Engineers, Dr Thomas Docker, Chairman of CITI, will share his insights on the topic of **'Forensic Project Management'**.

Projects do fail, but when the problem was avoidable because it was a repetitive error (one made before and the signs were known but ignored) the impact is worse. A forensic service identifies causes, and may apportion blame if appropriate, but essentially identifies policies and practices to adopt to prevent a reoccurrence. Perhaps the most valuable aspect of the approach is allowing an organisation to move on – with a new maturity and awareness about the factors in the project environment that trigger project failure.

For any enquiries please contact the ICE SW Events Co-ordinator: t. +44 (0)1752 895646, f. +44 (0)1752 895144, e: icesw.events@ice.org, uk, w: ice-southwest.org.uk.

Way

of our culture, invaluable in the development of our change management capability."

Steve Hall concludes: "We have seen substantial changes to the behaviour and approaches of our senior change leaders within days of attending the briefings. There is business ownership of benefits and business cases and clarity on roles and responsibilities. We already see a renewed focus on benefits delivery and partnership working which is essential to achieving our ambitious delivery goals."

"The discussions around effective sponsorship have led us to review the allocation of the right sponsor for the right project and thus enhanced the effectiveness of our project governance. We are also beginning to see sponsors challenging current approaches and making valuable contributions to the ongoing revision of methods and practices," adds Jon Marchant, Business Leader, Change Management.

"we wanted to ensure our leadership team were supported and enabled to take on their change leadership role and deliver benefits on behalf of our customers"

focus on essential skills

When budgets and time are limited our short essential skills courses provide skills that can be immediately applied.

CONTRACT AND SUPPLIER MANAGEMENT

19th-21st June – £1,350
Most projects and programmes contract in or outsource an element of their delivery; this adds additional complexity.

In this one day master class, you will gain an understanding of the commercial and contractual issues that often sit awkwardly with the traditional time, cost and quality focus of the project manager, and how you can best work with the legal and procurement functions to ensure project success.

EFFECTIVE PROJECT ASSURANCE

28th June – £490
Many individuals act as a guidance or monitoring source for projects and need to be able to review a project and provide a constructive action plan to the project manager.

Having a formal approach to this critical skill, beyond that of an audit function, adds value and ensures that the review is consistent and effective. The CITI health check approach provides a consistent process for project reviews whether the output is focused on guiding the project manager or monitoring the status of the project.

MASTERING THE ART OF STAKEHOLDER ENGAGEMENT

29th June – £490
The active engagement of key stakeholders is at the centre of the project plan. Failure to engage stakeholders correctly is frequently cited as a common reason for the failure of projects.

This masterclass provides an enlightening assessment of the politics of projects and practical techniques for identifying and engaging key stakeholders. The day consists of a series of fast-moving, short lectures punctuated by individual and group exercises.

Multiple-delegate discounts are available for all our open courses. For further details call Anna Havard on 01908 283600 or email opencourses@citi.co.uk.

time is ticking



Are you facing a project management demographic time bomb?

The growth of project management as a major management discipline, and the increasing dependence of organisations on projects, has resulted in a ticking demographic 'time bomb'. Many highly experienced project managers are approaching retirement and, without management action, they will take their practical experience of effective 'on the ground' project management and their ability to manage 'difficult' projects with them.

This potentially damaging problem manifests itself most clearly in the more technical and engineering sectors where 'know-how' rather than knowledge, experience rather than intellect, takes years to acquire, and has to be translated into behaviours and actions by acts of judgement, not drill.

depth of experience

CITI's market-leading, evidence-based profiling findings, based on more than 14,000 project managers, shows beyond doubt that width and depth of experience (measured by variety and complexity of projects managed) is the single most important factor in predicting performance.

The nature of the correlation is such that experience tends to act as an upper bound to capability; project managers may be less capable than their experience would indicate, but are seldom more capable. Good project managers develop:

by Hilary Small, Principal Consultant, CITI

initially Intuitive (knowledge-based), under the right circumstances they adopt a Methodological approach (experiential) and for some 8-9% they progress to Judgemental where they integrate knowledge and skills into 'know-how' and judgement.

Although some organisations have identified the depth of their aging problem, there are many who haven't. There is no 'one size fits all' panacea; the complexities and cultural differences of organisations preclude this. However, the solution can be found by combining developmental and change management techniques.

We have organised combinations of tools, techniques and approaches which, when tailored to meet specific concerns, meet the transfer of skills and 'know-how' needs that these organisations have. We focus on diffusing the threat by selecting mechanisms that address the specific characteristics and scale of the problem. The approach is one that organisations can adopt with confidence as it has been proved in clients with considerable success; and we support the implementation of the solution until it is fully embedded, and becomes 'the way we work' for the next generation.



fast-track your rising stars

The MSc Managing Major Projects and Programmes provides a structured development route over two years to fast-track project managers' knowledge and experience.

Project managers who understand and apply project methods are taken through a development programme that will teach how to apply judgement and deal with the power and politics involved with managing complex projects and programmes.

Using project and programme case studies, MSc delegates accelerate their management experience by applying learning in a safe

by Anna Havard, Open Course Manager, CITI

environment.

Assessment on the MSc requires delegates to apply the learning to their current projects and programmes, so that sponsoring organisations immediately see an improvement in their management approach.

Subject areas include:

- Business strategy
- Translating vision to reality
- Business change management
- Business risk
- Structuring a programme
- Value management
- Risk management

- Stakeholder management
- Project planning
- Leadership and motivation
- Visibility
- Contracting
- Requirements management
- Managing virtual teams

Delegates come from a wide variety of industry and government sectors. Over the two-year programme delegates are encouraged to network to share experiences of what both good and bad look like, increasing their real world knowledge further.

The next group starts in October with the deadline for applications in late July. For further details please call 01908 283600 or email msc@citi.co.uk.

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