

news from CITI – for projects and programmes



active benefits realisation

Active benefits management is a journey to grow the value from the organisations investment.

The purpose of benefit realisation or, more specifically benefit measurement, is not simply to 'look-back' and see if we got the benefits. Nor is it to help justify and prioritise projects within the portfolio but more importantly to provide the revised operational measures which guide operational change.

We need to get much better at understanding the surrogate measures and performance indicators related to the project delivery, which can be measured quickly and show that operational performance is moving in the right direction. After all, these are exactly the new

by **Louise Worsley**

Design Authority: CITI

performance measures that will be needed to manage and structure the revised operational environment.

research on benefits

In 2009 the APM instigated the 'Active Benefits Realisation Management survey'. This took feedback from 103 organisations in the public and private sectors. The aim of the survey was to assess perceptions of maturity in the take-up of benefits management and to identify areas of strength and weakness across the industry. The results were published in September 2009.

The report includes comments on the barriers to benefits realisation and amongst these the following comments seem particularly relevant:

- Project focus – the excitement/pressure is in the project start and delivery, checking it was worth while doing might be embarrassing...it was delivered on time and on cost, it's a success – don't spoil it by seeing if we should have even done the job.
- Process & compliance – we have good ownership of benefits, but our follow-up does not yet have sufficient rigor. We need to achieve this without the process being seen as unnecessary bureaucracy.
- Political dimension – projects/programmes are started in response to a political commitment and so the task becomes one of finding sufficient benefits to justify the chosen solution.
- Leadership – it is key to ensure that accountable executives (Sponsors) recognise their role, and commit the same time and energy to benefits for delivery and costs; the lead business manager (sponsor) is not incentivised/

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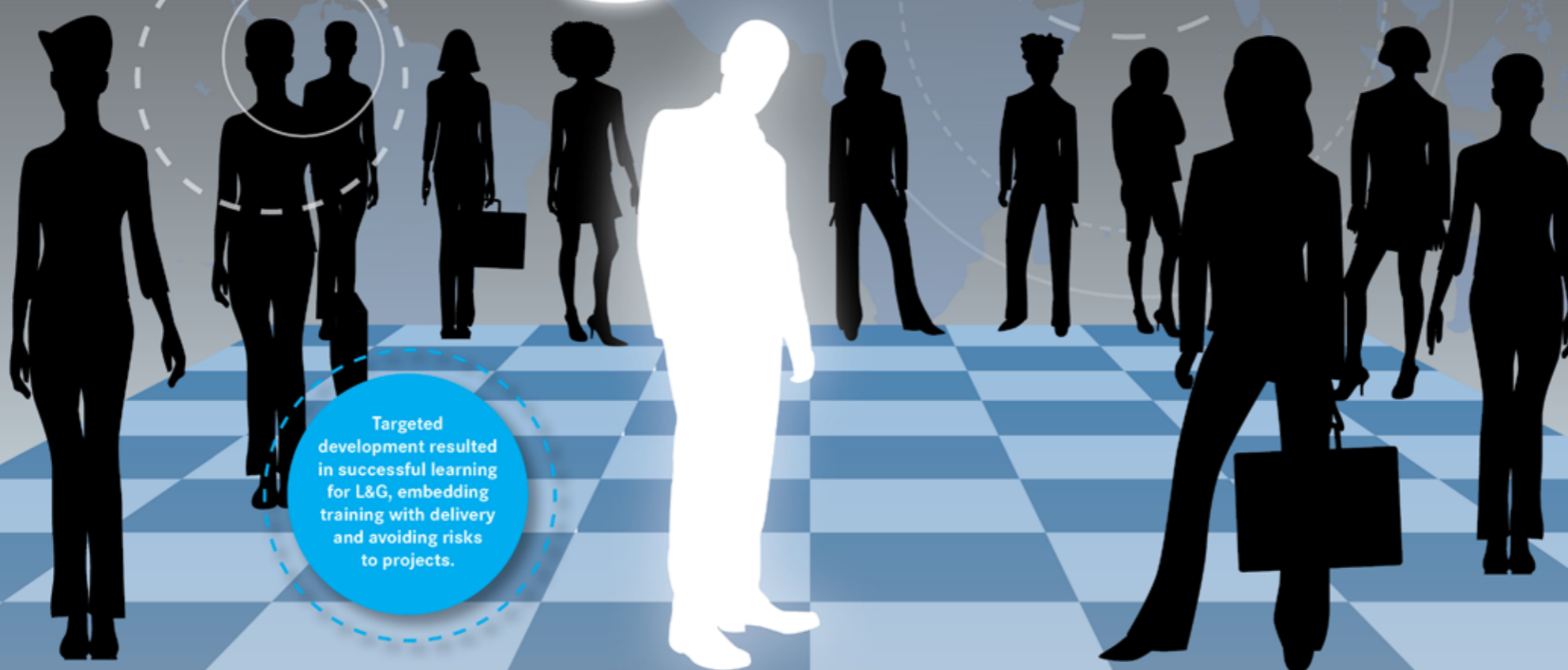
penalised on the outcome.

- Business focus and change management – there is still more to do to get it fully embodied into change management including: improved commitment to, and compliance with standards.
- Organisational change – the environment the project is delivered into is different than when project is assessed. Locus of responsibility – roles and responsibilities not clear and the benefits realisation process often end up owned by the project team.
- Cultural issues – need to change the culture to more actively seeking benefit opportunities; no pressure to change or to hold people to account for realisation of planned benefits.
- Technical issues – lack of a link between project/programme benefits and strategic targets; difficulty of measuring long-term benefits and attributing them to a specific initiative; need to improve the toolkit for quantification and valuation of benefits.
- Awareness – lack of experience/knowledge in identifying and quantifying benefits within the PPM community; no clear understanding of how to quantify and therefore measure benefits; lack of senior management interest/understanding in the detail of how benefits realisation should work. No desire to link change activity to benefit achievement, paying lip service to benefits.

A full copy of the paper, Active Benefits Realisation Management – Research Survey of Perceptions of Maturity, Stephen Jenner 2009 – can be found http://www.ogc.gov.uk/documents/BenefitsRealisationManagementPhase2Reportv2_0.pdf

- For more information on how CITI can help you to successful embed Active Benefits Realisation in your organisation please contact Amanda Muscat on 01908 283600.

raising the game



Targeted development resulted in successful learning for L&G, embedding training with delivery and avoiding risks to projects.

Legal & General plc (L&G) has engaged CITI many times over the years in a number of its businesses to provide project, corporate portfolio and programme management education and consultancy.

Legal & General Group (a FTSE 100 company) is one of the best known and respected financial services companies in the UK. They are a leading provider of risk, savings and investment management products in the UK, with nearly seven million customers worldwide.

In response to a rapidly changing business environment in their Individual Protection business, they needed to improve their capability to deliver change. We were asked to outline an approach to assess their current change capability, benchmark this against similar organisations, and design a targeted development programme that didn't impact current priorities of the business.

training model

"The classic training model, taking individuals out of the business to sit in a classroom for a week at a time, was not going to work for us" says Jane Logie, Strategy & Development Director, "but at the same time, we knew we needed to raise our game in managing change". This is a current business issue for many of our clients

by Jane Logie, Strategy & Development Director: Legal and General & Nick Dobson, Principal Consultant: CITI

– the need to develop capability, without the capacity to take large numbers of the change community 'off-line' to attend training courses." CITI were a good choice for us" continues Jane, "having worked with them before, we knew they were able to deliver high quality support coupled with leading edge advice and people. The main attraction of their approach has been the quality of the benchmark data used in assessing our current capability – allowing for extremely targeted development, and the way in which the development has been delivered in-line with business pressures."

The key to success was indeed the way in which the development programme was designed and delivered specifically to suit L&G's environment. Once the profiling element was completed – evidencing strengths and areas for development – project managers were immersed in short, best practice workshops with CITI experts. Delivered over a period of months, these workshops targeted the areas identified for development. After each workshop, individuals were given the opportunity to apply the best practice in their live project environment through supported work-based assignments. A hugely successful approach, it effectively accelerated the learning by embedding it with delivery. At the same time, it did not increase the risk to any project because these new ways of working were supported

with CITI coaching. Reflecting on the engagement to date, Jane says "this approach was far more useful than a week in a classroom. It gave our project managers the opportunity to experience best practice in action, and didn't distract them from our on-going business and change agenda". "And I have to say, your people are brilliant", finished Jane. Nick Dobson, our Lead Tutor for the programme says "this has been a very rewarding and interesting engagement with L&G, together we were able to explore new ways of meeting today's challenges and were hugely successful in our pursuit". The unique approach is being successfully implemented in other parts of the business and we continue to work with Jane's area to meet a challenging business environment.

project conscience

There are some project managers who write lists, and there are those whose head for detail is staggeringly good, and there are a lot of us that wake up with a start as the sleeping brain throws up that thing that you didn't do and should have. It's not the little things, the memos not written or that chat you ought to have made time for that brings on the panic attack. It's when you're not sure, but you have to make the decision; it's when you want evidence, insight, assurance – something – that the path you've set the project on, and the decision about the investment entrusted to you is right, or at least the best one given what is known, and what could be known.

committed project managers

Project governance – whether project manager or project sponsor – is a lonely job, you are the hub, and in the din of action it is not easy to hear the 'still small voice' of experience that would guide you right. The people who can help are other committed project managers, they understand the issues; they share the disciplines that are the cornerstone of project judgement, but they also share the time pressures and isolation – and they therefore don't help. What you could do with is a project managers' Jimmy Cricket that has considerable PM expertise and experience, and has access to huge resources of evidence, insights and innovation in solving project dilemmas, and knows how to get it across to you so that the important things don't get overlooked and the lessons learned by generations of project managers don't have to be learned anew. What you need is a PM conscience. CITI has these. If you are faced with a difficult and complex project – and you want to do it well; if you have moved jobs or roles and would appreciate support in taking the next few steps; if you have just been thrown a challenge to move your organisations' project performance up a notch or two and would like to achieve it and yet keep some form of work-life balance – you will find having a conscience really helps. Talk to people who've had one, and then come and talk to CITI.

by Dr Christopher Worsley
CEO:CITI



the major change challenge

Due to economic pressures, organisations are increasingly attempting to optimise the use of their resources – particularly in the identification and management of those which are strategic or scarce. This has generated great interest in portfolio management, which is often viewed as an approach by which sound, commercially relevant decisions can be made and implemented.

In defining the criteria for managing a portfolio a key consideration is “as we are unable to do everything – let’s decide what to do that is of the most value to us!” This means that senior managers need to identify the criteria by which projects should be prioritised. Consequently key concerns get debated such as; “what do we really value?”, “how do we control and optimise the use of resource?” and “how should we factor risk into our decisions?” These debates are often robust, challenging and usually require strong facilitation. However they should lead to the establishment of clear set of criteria by which management can make the ‘correct’ decisions when tough choices are necessary. Implementing these criteria as the portfolio of work progresses over time is the role of portfolio manager.

So, that’s how to do it! Or so runs the theory; which generally holds true until the first big NO conversation.

challenges a resource

Typically it happens this way:

Managers meet, criteria are agreed, work is managed, resource allocations are made...and then an issue arises. Manager ‘A’ challenges a resource allocation decision and confronts the portfolio manager. The portfolio manager says “NO – the criteria have been agreed and this is how we are managing the situation”. Manager ‘A’, unhappy with this response, then escalates the issue and confronts the portfolio manager’s line manager. Is the portfolio manager supported or not? This is the first big NO conversation.

Failure to support the portfolio manager can result in the complete destruction of the criteria established with the results of a politically charged aftermath and the discrediting of the entire ‘portfolio’ approach. This is not a trivial matter which is why this challenge is sometimes referenced (e.g. the OGC portfolio management guide speaks of ‘organisational energy’) however, it is seldom adequately addressed.

To allow portfolio management to work effectively it must be demonstrably and visibly supported by the most senior of management when required. For nearly all organisations, this is a major ‘change challenge’ and poses important questions about the senior management’s true commitment to the adoption of portfolio management and its pursuit into the future. Hence the first big NO conversation is likely to prove pivotal to the overall success of portfolio management in any company that adopts the approach.

by **Peter Collin**,
Principal Consultant: CITI



EC Harris's pragmatic programme has led to the identification of individual development needs in line with best practice project skills.

achieving excellence

International built asset consultancy, EC Harris, is the first professional services firm to achieve Corporate Accreditation by the Association for Project Management (APM) for its alignment with best practice in project management and development of the skills of its project managers.

As part of its alignment to the APM, EC Harris has embarked on a development programme for its wider project community based on APM's Project Management Competency Framework (PMCF). The highly pragmatic approach has seen CITI working alongside EC Harris to produce mappings between the PMCF and EC Harris project community roles. For each role, some of the competence areas in the PMCF have been identified as core, while others have been identified as supporting competences.

Individual role holders self-assessed against their core and supporting competences. This was followed up with each person being interviewed by a CITI consultant to evaluate their self-assessment of core competences and identify potential development needs. The analysis of those that have participated so far has been used to identify individual

by **Brian Snowden**, Head of Learning & Development: EC Harris & Simon Green, Client Director: CITI

development needs. Many of these needs are shared with others and a development programme has been planned to address both individual and group activities. A blend of learning events is being used, with a focus on support within the workplace, to ensure that the desired impacts are made.

development plans

This approach is also being used to the benefit of EC Harris' clients. Most recently it has been deployed for the teams working with BAA at Heathrow, ensuring that EC Harris meets critical client requirements of alignment to, and excellence in, industry best practice such as APM and OGC.

As a company that provides managed services, EC Harris has identified other competences that are relevant to their project community and these have been included in the development plans. Brian Snowden, EC Harris Professional Services L&D Consultant observed that, “To be famous for PPM, EC Harris has to be able to demonstrate it is at the forefront in project and programme management. In particular, it is important to us that any development has a focus on building best practice, so that we deliver successful outcomes for our clients.”

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