



# Welcome to CSI London

or.....Experiences with Portfolio Management Systems

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# Forensic portfolio management?



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## Content

§ The wrong way

§ Integrated approach – the right way(s)

§ Developing Maturity

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## The wrong way - the issues

What EPM tool issues are most common?

- § Now we have it – what do we do with it?
- § All plans are the same.....right?
- § The computer says NO
- § Useless reports
- § Where are my projects?
- § Data is out of date
- § My workload has doubled!
- § How do I.....?
- § I can't access the system (offsite)
- § Dreadful system performance

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## Where EPM goes wrong

- § EPM Tool procurement
- § EPM Tool implementation
- § EPM Tool usage
- § EPM politics



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## Where EPM goes wrong

### EPM Tool procurement

- § Lack of requirements
- § Lack of criteria
- § Lack of capability to use
- § Opposition – Not invented here
- § Lack of budget



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## Where EPM goes wrong

### EPM Tool implementation

**START**

- § Lack of planning
- § Poor design or design implementation
- § Lack of skilled support (from supplier)
- § Failure to communicate
- § Retention of old ways
- § Lack of training
- § Technical issues, e.g. performance
- § Outputs not defined

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## Where EPM goes wrong

### EPM Tool usage



- § User administration slow
- § Data does not remain current
- § No learning and development
- § Lack of resources to evolve system
  - § E.g. bespoke reports and dashboards

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## Where EPM goes wrong

### EPM politics

- § Delight some – annoy others
- § Exposing weakness or failure
- § Sceptics – “never seen it work”
- § EPMO and EPM tool ownership
- § We cannot have a powerful EP MO



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## Integrated approach – the right way

The clue is in the box

- § Functionality
- § Workflows
- § Template – data, reports, dashboards
- § Web enabled

*The tool is not enough*

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## Integrated approach – the right way

Components of an integrated approach

- § Clear management objectives
- § Processes
- § Data standards
- § Information systems – EPM tool
- § Organisation, roles & responsibilities
- § Knowledge & skills
- § *And the EPMO is the HUB*



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## Integrated approach – the right way

- § EPM Tool procurement
- § EPM Tool implementation
- § EPM Tool usage
- § EPM politics

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## Where EPM goes right – C&W

### EPM Tool procurement

- § Part of Integrated PM strategy
- § Defined requirements
- § Set budget – whole life
- § Define assessment criteria
- § Issued RFI
- § Issued Tender to 1<sup>st</sup> shortlist
- § Final selection



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## Where EPM goes right – C&W

### EPM Tool implementation

**START**

- § Planned a phased implementation
- § Worked with IT platform operators
- § Planned the support needed
- § Engaged with users and stakeholders
- § Budget for supplier support
- § Controlled migration and testing
- § Training and support from pre-launch
- § Pilot.....

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## Where EPM goes right – C&W

### EPM Tool usage

- § Live support in place from Day 1
- § EPMO established as owner
- § Phased evolution
- § In house training capability
- § In house configuration capability
- § Continuing engagement



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## Where EPM goes right – C&W

### EPM politics

- § Understood stakeholders
- § Allies, Neutrals, Opposers
- § Communications planning



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## Developing Maturity

- § Maturity and Benefits
- § Maturity models
  - § ProgM - PMMM
  - § OGC P3M3 Levels 1-5
    - § Level 1 - initial process
    - § Level 2 - repeatable process
    - § Level 3 - defined process
    - § Level 4 - managed process
    - § Level 5 - optimised process



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## Summary



§ don't just buy the tool

§ Know what you want it to do and how you will use it

§ Know what might be stopping you from using it well

§ Integrated approach



§ Maturity, capability and benefit

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## Thank you

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