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Portfolio & Programme Management (PPM) Global Service Catalogue

July 2017
v1.1

PPM Global Service Catalogue 2017

What we do

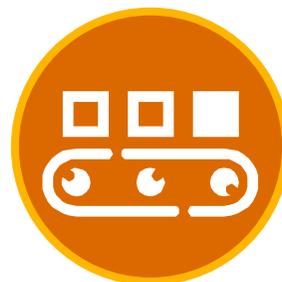
Our service offerings:

 <p>What is PPM?</p>	<i>Prioritise</i>		<i>Execute</i>			<i>Realise</i>
	1	2	3	4	5	6
	<i>Portfolio Management</i>	<i>Programme Mobilisation</i>	<i>Programme / Portfolio Maturity Assessment</i>	<i>Hybrid Delivery</i>	<i>Programme Recovery</i>	<i>Benefits Management</i>

How we do it



12 Elements of Delivery Excellence



Our Tools and Methodologies



User Guide

What is PPM?



What is Portfolio and Programme Management?

We are a global team of Portfolio and Programme Management (PPM) professionals who specialise in designing and delivering complex transformation programmes.

“Our passion is helping our clients execute their strategy”

Our clients are dealing with unprecedented challenges driven by factors such as shifts in global economic power, demographic changes in an ageing population, the digital economy, and the emergence of global players disrupting traditional sectors.



As a result, our clients are need to deliver bigger, transformational change, and do so at a faster pace than ever before. At the same time, the cost of failure is increasing, and organisations cannot afford to deliver change programmes using the same old ad hoc approach and processes.

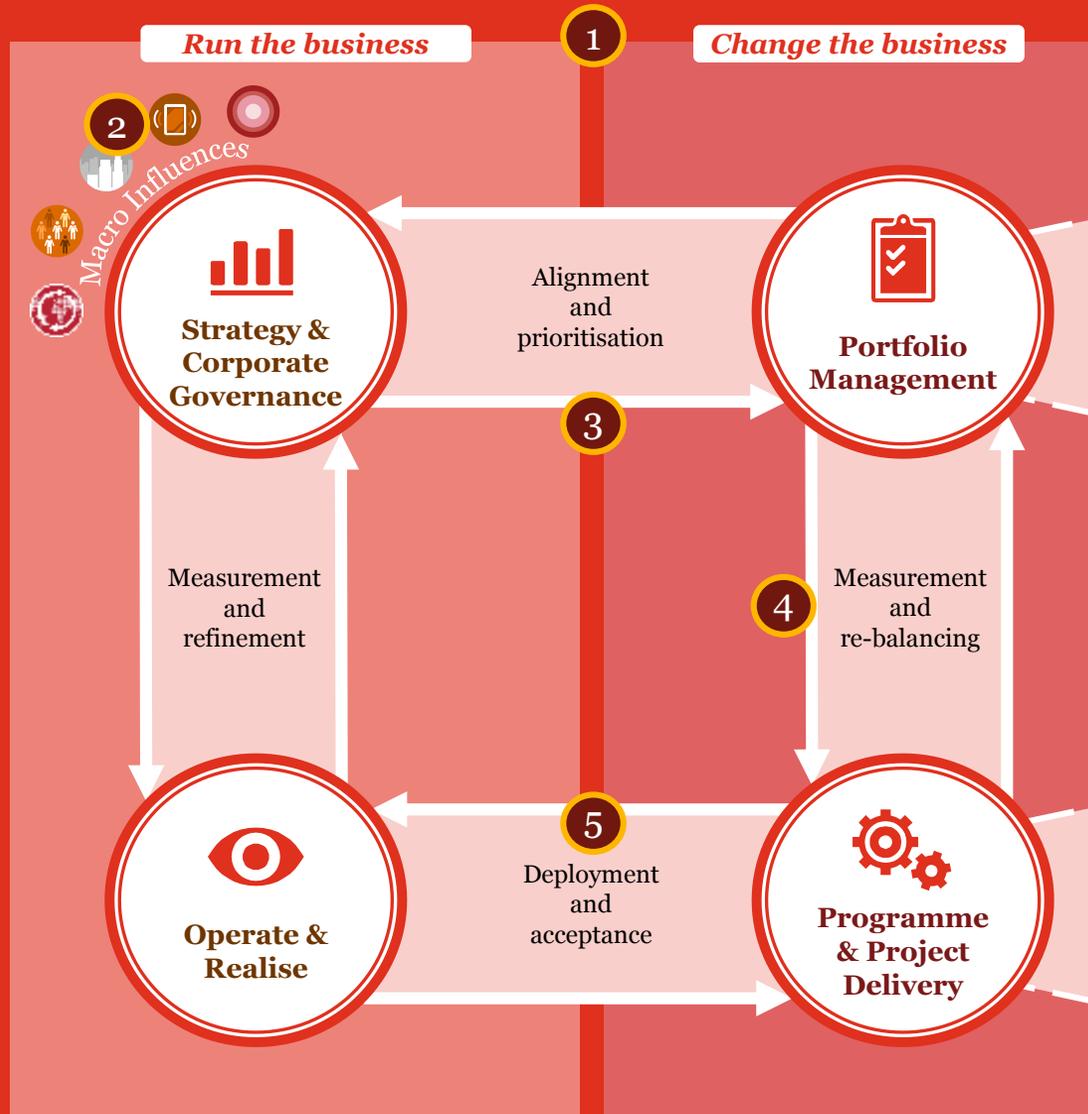
PwC’s PPM capabilities have been developed to address the most frequent and significant challenges our clients face when approaching organisational change. We bring the best of our extensive experience, industry knowledge, tailored tools and templates, and specialised professional networks to help our clients **prioritise** their change activities, **execute** them effectively, and **realise** their benefits.

Our mission as a global team is to help our clients with:

Choosing the right set of projects; effectively executing them; and realizing their benefits.



What is PPM?



High-performing enterprises understand the relationship between 'running' and 'changing' the business

The model to the left shows the key factors in this relationship, and the five areas where leading organisations focus their attention.

1 Changing versus running a business
 The differing considerations and approaches necessary when considering 'Run the Business' and 'Change the Business' functions

2 Macro Influences
 Changing external factors which impact the business (positively or negatively);

3 Embedding Strategy
 The activities behind successfully embedding strategic imperatives into the business

4 Measuring Performance
 The necessary metrics and processes for determining the fitness of current business operations and the effectiveness of delivering change

5 Embedding Change
 The important processes and interactions to be considered when designing, constructing and embedding changes into business as usual

What is PPM?

Run the business

Change the business

Change takes more than a project team and a budget - high-performing organisations...



...Prioritise their portfolio and align it to their business strategy



...Execute their programmes and projects to deliver the outcomes the need



...Realise every benefit, and embed benefits management in their organisation



Operate & Realise

Deployment and acceptance



Programme & Project Delivery

Portfolio
 Aligning strategy to project selection, benefits optimisation and investment.

Programme
 Implementation of a set of related projects or workstreams to deliver business outcomes and benefits.

Project
 A short term set of activities to deliver one or more outputs in accordance with a specific business case. A particular project may or may not be part of a programme.

Portfolio Management
 A function dedicated to supporting delivery of a portfolio's overall benefits through insightful reporting and controls, appropriate resource allocation, and continued refinement.

Programme Management
 A central function to provide visibility and allow control of all programme or project activity being undertaken to achieve change.

Project **Project** **Project**



Portfolio Management

1.

Do you need to upgrade your portfolio management?

Your programmes are overstretched, under-resourced, or off-track

Complex or large-scale changes are conflicting or impacting business as usual

You see variation in performance or outcomes at different sites or across territories

Your pace of change needs to increase due to competition or market changes



Of PMs say there is a coherent link between the programme's benefits, objectives and organisational strategy and vision



Of PMs say that planned benefits are "always/often achieved"



Of PMOs report spending most of their time on simple reporting rather than more strategic activity

The portfolio management lifecycle

In a nutshell:

“Portfolio Management is an approach that helps clients deliver the best possible outcomes and return on investments from their portfolio of transformational programmes, projects and other activities.”

1 - Portfolio Mobilisation:

Translate strategy into action.
We build a holistic view of change and investment across your organisation, work with you to determine priorities, and begin engaging stakeholders.

2 - Portfolio Management Design:

Setting up for success.
We work with you to design the portfolio management function with the right processes and controls, unblocking organisational issues that may jeopardize delivery along the way.

3 - Data Preparation

Getting to know you better.
We work with your key contributors from across the organisation and use their input to build a holistic view of the portfolio. We look at planned and active projects for their contribution to delivering your strategy.

4 - Portfolio Assessment

Test and refine the ‘to-be’ portfolio.
Using the data we’ve gathered, we model the impacts of various change options for you to review. Then we help you build a functional portfolio that delivers value and helps you achieve your ambitions.

5 - Portfolio Recommendation

Making the right decision.
We present our final recommendations and help you build a plan for communication and delivery of your ‘to-be’ portfolio.

6 - Operate Portfolio

Maintain and deliver.
Your change function is now fully aligned to your day-to-day business and organisational strategy, with continual assurance and learning built into the portfolio.



Your Issues:

- Increased competition and market pressure
- Lack of skilled resources for projects
- Increasing risk across the business
- New leadership or strategic vision
- Challenges delivering change across a global organisation

Benefits to you:

- Strong governance supported by the right information
- Engaged stakeholders
- Fewer barriers to effective communication
- Managed risks, issues and opportunities
- A whole-organisation approach to assurance and learning.

Our approach to upgrading your portfolio

Portfolio Management 1 2 3 4



MOBILISATION



Core activities

- Develop vision and confirm strategy and objectives
- Establish project scope and delivery plan

Moments that matter

We work with you and key stakeholders to establish a clear vision, underpinned by your organisation's strategy and objectives

What you get:

Momentum and enthusiasm for change, underpinned by a clear plan and strategic vision



MANAGEMENT DESIGN



- Define portfolio governance
- Establish portfolio management office

Your key stakeholders are bought into the change and a foundation of strong portfolio governance is in place

A mobilised, robust portfolio management office



DATA PREPARATION



- Assess current landscape
- Interview key personnel
- Collect relevant portfolio and business data

We engage a range of your staff from all areas and develop complete 'as-is' and 'to-be' views of your portfolio based on their input

An agreed, unambiguous view of your current portfolio and options for improvement



PORTFOLIO ASSESSMENT



- Categorise activities
- Data modelling and analytics
- Portfolio optimisation

Early and often, we model various change options and share the outputs with you, helping you agree on a forward view

Clear visualisations of what the future could look like, with effects and impacts modelled



PORTFOLIO RECOMMENDATIONS



- Draft portfolio blueprint
- Share portfolio baseline
- Present recommendations

We present our final list of recommendations, supported by a clear plan for delivery and communication

A final list of key recommendations, and a blueprint for achieving them.



OPERATE PORTFOLIO



- Performance monitoring and reporting
- Embed assurance and learning

Your 'change the business' and 'run the business' functions are aligned, and continual assurance and learning are built into your portfolio

A fully-aligned, sustainable and smooth-running portfolio.

What does working with PwC feel like?

Portfolio optimisation for a Major UK Bank

Client issues

Client was 18 months into a major transformation programme. However, due to internal challenges, the portfolio was:

Uncontrolled	Oversized
<ul style="list-style-type: none"> No link to strategy Weak governance Poor business cases Scarce delivery resources 	<ul style="list-style-type: none"> Mix of “must-do” and “could-do” projects Change demand almost 50% of FY14 Revenue

Project objectives

1. Assess current project inventory for business viability and strategic fit.
2. Create the right framework to evaluate and prioritise projects based on holistic criteria.
3. Develop the best-fit project approach to deliver change over the next 3 years.
4. Build buy-in from stakeholders across the bank for the new, realigned portfolio.

Our approach

1 Agree new framework for evaluating and prioritising projects	2 Establish a baseline of available resources, change demand, and projected outcomes	3 Re-assess the portfolio, challenge business cases, and build a new, aligned portfolio
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Benefits to our client

- Reduced overall portfolio size by ~40%
- Portfolio is now closely aligned to strategic objectives and with agreed, robust criteria, with a critical path of “must-do” change universally understood.
- Achieved agreement amongst the Bank leadership on the revised size and funding of the change portfolio.

Why PwC?

We understand what makes business transformation programmes successful: from programme delivery structures and business engagement models to key technical issues and ongoing learning and improvement.

We are committed to sharing our knowledge and experience with your team, to compliment your existing capabilities and propel you to the next level of Portfolio delivery.

Engagement facts

-  **Duration**
11 weeks
-  **Territory**
United Kingdom

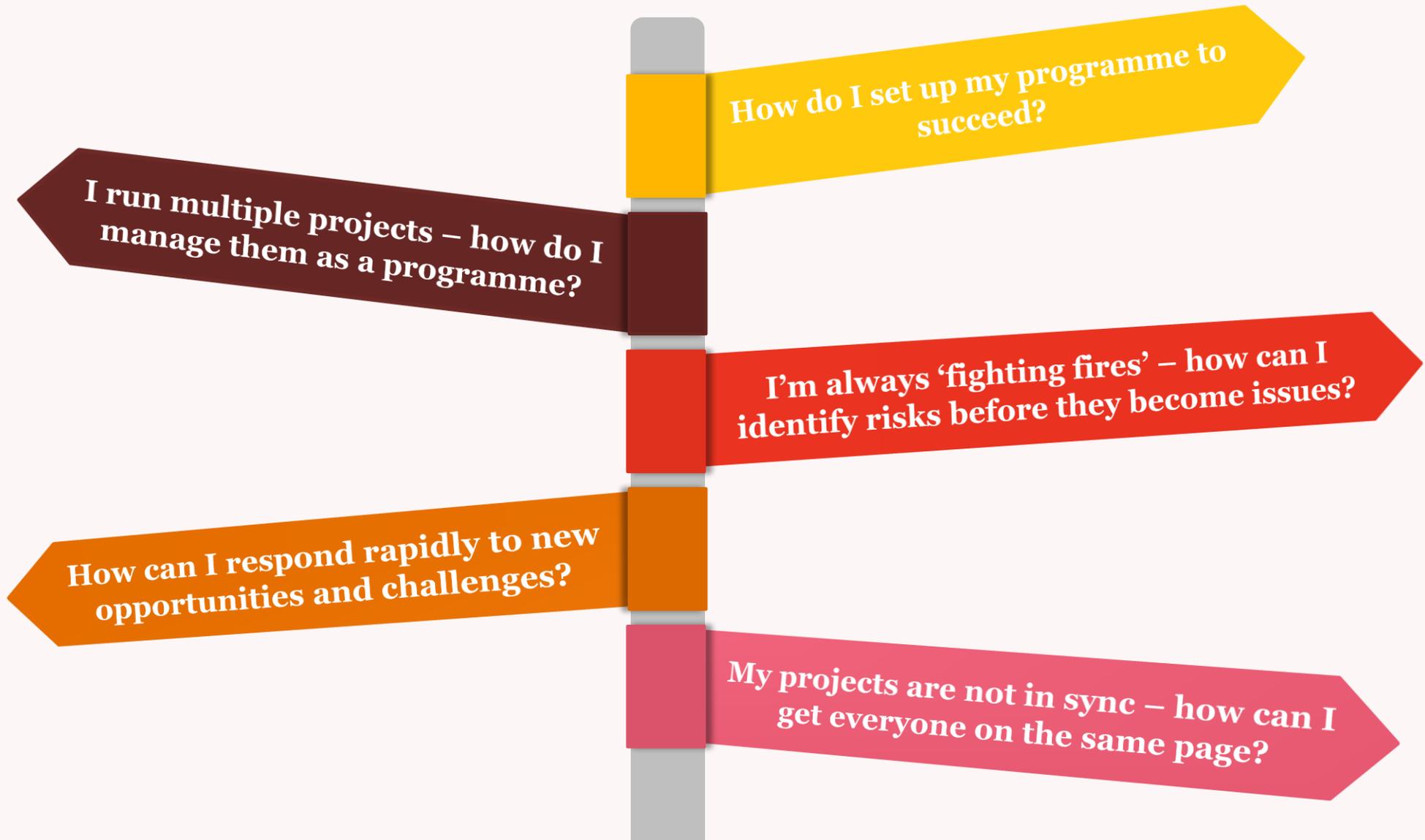
Key outcome:
A portfolio that delivers strategic change, sustainably and effectively.

For further information on this offering, [Click Here](#)

Programme Mobilisation

2.

Set out in the right direction...



...with effective Programme Mobilisation

In a nutshell:

Programme Mobilisation sets the shape and pace of your programme and ensures the 12 Elements of Delivery Excellence are embedded, pointing the programme in the right direction from the outset.

Our approach...

	1	2
	Set up Programme Management Office (PMO)	Build programme maturity
Purpose	We begin by working with you to set the universal standards and processes that will form the foundation of the PMO, and build commitment to change across your organisation	Get the PMO up and running, ensure the right information is being reported, and put in place a clear plan to build your project and programme management capabilities
Moments that matter	Build momentum for your programme with a focused mobilisation plan and set of standards	Manage your programme with confidence, supported by a 'single version of the truth' to help keep you focused
Core activities	<ol style="list-style-type: none"> 1) Rapidly mobilise programme team 2) Assess current PMO and introduce standard tools and processes 3) Develop an initial plan for delivery while PMO is being set up 	<ol style="list-style-type: none"> 1) Introduce controls to minimize delivery risk 2) Provide intelligent reporting to enhance decision making 3) Keep programme focused on delivering business benefits 4) Embed the PMO in the organisation

...addressing key issues

Before	After
Lack of programme control	Programme is controlled with clear oversight and governance
Poor monitoring and reporting	Leadership receive the data they need to make the right decisions
Risks are poorly managed	Risks are identified early and appropriate actions are taken
Inability to respond rapidly to changes	Programme is more agile and can capitalise on new opportunities
Lack of standardisation	Shared tools and methods enable consistent and predictable success

Our point-of-view

Programme Mobilisation 1 2 3 4

Time and again, we see programmes struggle because of fundamental issues in the mobilisation stage. Our global experience gives us a unique point-of-view on the two things you must do to improve your chances of success.

Portfolios, programmes and projects are clearly aligned to organisational strategy

1. Get the building blocks right on a more consistent basis.

Plans and scope should be based on data and experience, and challenged by subject matter experts from the outset

Programmes should be resourced with properly-skilled professionals

PPM is a profession, and training project/programme managers effectively will improve delivery success

Good communication is more than a top-down briefing session – involve staff at all stages of transformation

'Lessons learned' should critically examine which aspects could be better, and work actively to improve them

2. Develop different ways of delivering programmes



Optimise portfolio to maximise return
Leadership need to made decisions based on objective criteria, not political will or subjective information



Be flexible, change faster
Create plans that embrace change, and be ready to make brave decisions at short notice



Connect Executive and Delivery teams
Build effective communication between those who sponsor change and those delivering it to generate collective responsibility for success



Measure and address the harsh facts
Identify simple and hard-to-ignore metrics that highlight harsh facts of non-performance throughout delivery



Enable people to deliver success
People deliver programmes, not plans and processes. Provide training that builds the skills you need, and give your people the right tools to do their jobs effectively.

What does working with PwC feel like?

Building a central PMO for a UK Transportation Authority

Client issues

We were engaged by a major transportation authority to help them plan for and deliver on a multi-£bn budget increase over a 5-year period

Critical Issues:

- Moving away from an in-year focus on spending to a longer-term strategy
- Building a new Target Operating Model to effectively manage the new budget.

Project objectives and approach

Design and develop a new Change Management Office providing the capability to manage ongoing complex transformation. The vision for the Change Management Office focused on four key areas:

Financial reporting – ensuring revenue is received on time, expenses are recovered and the programme leadership has a forward view on cost to completion

Structure and stability - Governance enabling decision making, a focus on quality, effective change control and managed risks and issues

The “why, what and when”– clear scope, benefits, plan and monitoring of the progress of delivery, as well as ensuring appropriate due diligence for the programme

Working together – Focus on effective stakeholder and client management, and on capturing lessons learned. Creating a happy and collaborative environment, and providing leadership for the programme team

Benefits to our client

- We delivered a completely revamped Change Management Office, designed cooperatively with the programme team and key stakeholders and aligned to our 12 Elements best practice
- Our team provided day-to-day support to programme workstreams – this extra capacity allowed the client to stop ‘fire-fighting’ and focus on long-term strategic priorities
- We helped our client identify the changes in culture and behaviours needed to build a more mature programme capability and run the CMO in the future

Why PwC?

We understand what makes business transformation programmes successful: from programme delivery structures and business engagement models to key technical issues and ongoing learning and improvement.

We are committed to sharing our knowledge and experience with your team, to compliment your existing capabilities and propel you to the next level of Portfolio delivery.

Engagement facts



Duration
9 Months



Territory
United Kingdom

Key outcome:

Our client has the central management function to deliver its full transformation agenda

For further information on this offering, [Click Here](#)



***Portfolio / Programme
Maturity Assessment***

3.

See yourself through a different lens

We can help you understand...

What happened
to jeopardise a recent change portfolio or programme

Where you are
with a quantified view of your existing change capabilities

Where to focus
Your attention to mitigate delivery risk in the future

What you need
to build to deliver successful, long-lasting change



We can deliver the insight you need

Portfolio / Programme Maturity Assessment



What we do



MOBILISATION & DEFINITION



- Agree scope and plan
- Submit data requests
- Agree interviewees and schedule



REVIEW & ANALYSIS



- Review key documentation
- Interview stakeholders
- Share draft report



REPORTING & NEXT STEPS



- Develop final report
- Hold summary/ "lessons learned" meeting

Core activities

Moments that matter

We working with you to decide which Elements, functions and activities to review so we focus on what is important to you

We speak to key stakeholders across the organisation to ensure our analysis is grounded in reality

We work with you to craft our final assessment, holding a "lessons learned" workshop to identify the way forward.

What you get:

Agreed review scope
Document and interviewee request list

Draft report for discussion
Interview minutes

Final Report, including practical 'next steps'

What you get

At the end of our review, we will work with you to produce a detailed final report showing your current maturity in a number of key themes, along with specific and actionable recommendations to help you reach the next level.

See where your strengths lie and where you can improve.

We will show you your current performance in up to 12 key areas such as Governance, Benefits Management and Change Control.

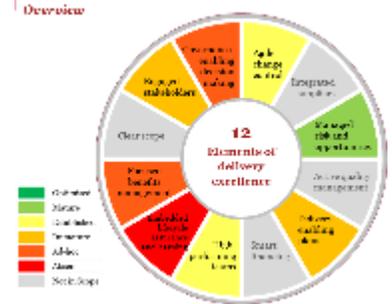


Fig.1 - Sample RAG analysis of overall maturity

Delivery-enabling Plans

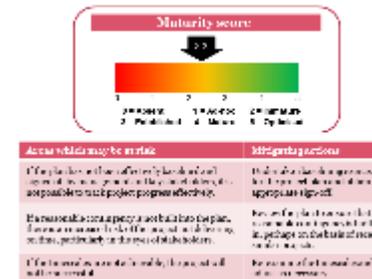


Fig.2 - Sample analysis of one Element

Delve deeper into your capabilities and identify risks to delivery.

For each of the 12 Elements, you will see precisely how mature your organisation is and the most important factors to focus on for improvement.

Any risks identified during the review will be displayed alongside potential mitigating actions.

The 12 Elements of Delivery Excellence

Portfolio / Programme Maturity Assessment

1 2 3 4

All of our work is underpinned by practical experience

We know there are many dimensions to the effective delivery of programmes. Our 12 Elements model sits at the heart of our offerings and outline the key elements of what a successful project, programme or portfolio should look like.

If each element is undertaken well, a portfolio or programme function should deliver:

Insight

Effective reporting that tracks all strategic change initiatives with tailored communication to stakeholders

Control

Controlled implementation in agreed timelines

Efficiency

Identify and eliminate overlap and exploit synergies leading to efficiencies and savings

Alignment

Connects execution with strategic direction



What does working with PwC feel like?

Portfolio / Programme Maturity Assessment



Assessing programme maturity for a major UK insurance co.

Client issues

Our client asked us to review their £1.2b programme to move to new headquarters. The programme had been running for over 12 months and included technology, facilities, and culture change elements. The main issue concerning our client was:

Lack of transparency

- Programme sponsors lacked confidence in delivery and were not receiving adequate information on budgets, plans, progress or risks

Objectives

Our objectives were:

- To carry out a Programme Maturity Assessment to review governance, commercials, progress against plan and day-to-day management of the programme; and
- To generate buy-in from Board-level sponsors relating to the improvements required.

Our approach

- 1 Conducted interviews and reviewed core programme documents
- 2 Used on-line assessment tool to generate report and tailored it to meet client requirements
- 3 Presented findings to sponsors and worked with them to prioritise actions for improvement

Benefits to our client

- All key areas of the programme were reviewed and challenged, providing improved transparency around progress, plans, budgets and risks
- The client can conduct comparable repeat assessments in the future based on the approach and findings of our initial report.

Why PwC?

We understand what makes business transformation programmes successful: from programme delivery structures and business engagement models to key technical issues and ongoing learning and improvement.

We are committed to sharing our knowledge and experience with your team, to compliment your existing capabilities and propel you to the next level of Portfolio delivery.

“We really liked the methodology and question set and were pleased that it would allow comparable repeat assessments to be made.”

Engagement facts

 **Duration**
6 weeks

 **Territory**
United Kingdom

Key outcome:

Improved transparency around key measures of programme success

For further information on this offering, [Click Here](#)



Hybrid Delivery

4.

Is it time to rethink your resourcing?

Hybrid Delivery 1 2 3 4

“We have too many contractors who aren’t incentivised to drive project completion”

“We pay consulting (and sometimes strategy!) rates for basic PMO, PM and BA roles”

“We have experienced (and expensive) PMs doing too many low-value consolidation and status reporting tasks”

“It seems that every project we run does things differently – and reports things differently”

In a typical global change programme, resourcing challenges can rapidly inflate overall cost:

15%
Paying high rates for commodity activities

15%
Using high-cost resources for low-value tasks

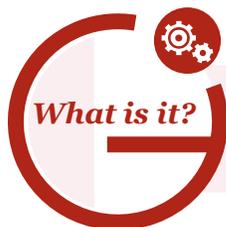
20%
Inconsistency or non-compliance with delivery standards

**Typical cumulative cost savings based on current live engagements*

Enhance your organisation with Hybrid Delivery

Hybrid Delivery 1 2 3 4

How it works



What is it?

Hybrid Delivery is a resource supply service drawing on our global capabilities to enhance your delivery capabilities and help you deliver your change needs

Any organisation looking to build a tailored delivery platform utilising on-shore, off-shore and near-shore resourcing options



Who is it for?



Why use it?

By accessing the PwC global network you will benefit from access to highly skilled and experienced PwC resources whilst reducing your cost and risk

We have developed a number of delivery options balancing cost, quality, capacity and risk according to your requirements:

Secondment	Resource augmentation	Project delivery	Long term drawdown	Outsourced/ managed service
Long term secondments, typically to fill key change roles (e.g. Resource Manager)	Change skillsets primarily managed by your delivery leads and embedded within your teams	A full PwC team to take ownership of project delivery and achievement of required outcomes	A drawdown arrangement giving you access to specific skillsets with some flexibility within scope and volume constraints	Assuming full delivery responsibility as part of an "outsourced" arrangement to deliver agreed change services

Reduced delivery risk

How is performance measured?



Utilisation

The rate at which available resources are engaged in portfolio/programme activities



Quality

Agreed KPIs such as compliance against delivery standards or reporting variance



Allocation

Where resources are spending their time on a day-to-day basis



Timeliness

Adherence to delivery timescales



Offshore Task Action

Average time for offshore to action a task set by the onshore team



Your Satisfaction

We measure what's important to you, in real-time

Enhance your organisation with Hybrid Delivery

Hybrid Delivery **1** **2** **3** **4**

We can provide low-cost, high-quality capabilities in a number of critical change roles:

Project and Programme Managers

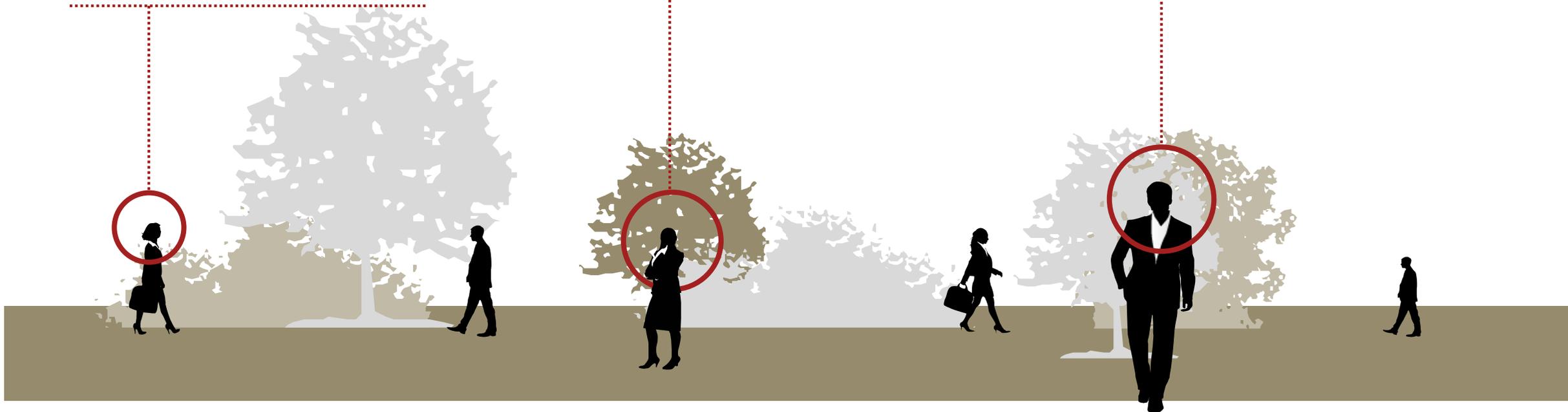
Programme and Project managers with direct experience of complex change projects involving global multidisciplinary change programmes. A number of our professionals have relevant qualifications and specialist knowledge to deliver tailored delivery expertise.

Business Analysts

We have a talented pool of Business Analysts, with experience in a variety of competencies including Risk, Technology and Finance programme delivery.

Project Management Office Resources

We bring a rich toolset and broad expertise in PMO across the globe. Our PMO resources can work both on site at your offices, and remotely in our nearshore service delivery centres.



What does working with PwC feel like?

Hybrid Delivery 1 2 3 4

Managed Service for a Global Financial Services Provider

Client issues

In January 2016, PwC was engaged by a major Financial Services client to address a number of problems in their Change function

- Inconsistent financial tracking
- Lack of standardised project documentation and reporting
- Non-compliance with delivery standards
- Lack of transparency and insight into performance

Project objectives

1. Provide PM, PMO and BA services to a portfolio of 110 in-scope programmes.
2. Work with the client to establish a baseline service catalogue with formalised revision/enhancement processes
3. Build a managed capacity solution using on-shore, near-shore and off-shore resources to reduce unit cost while improving quality

Our four-stage approach



Benefits to our client

- After implementation, milestone reporting compliance has increased from **20%** to **99%**, and financial variance has reduced from **13%** to **<1%**
- Reporting is streamlined and simplified, with one single version of the truth sitting behind each report.
- Uniform, enhanced delivery standards have been deployed across the portfolio, improving delivery quality while reducing cost.

Why PwC?

We understand what makes business transformation programmes successful: from programme delivery structures and business engagement models to key technical issues and ongoing learning and improvement.

We are committed to sharing our knowledge and experience with your team, to compliment your existing capabilities and propel you to the next level of Portfolio delivery.

Engagement facts



Duration
Jan 2016 – Feb 2019
(ongoing)



Territory
Global

Key outcome:

Our client has the capabilities and control required to deliver their global change portfolio

For further information on this offering, [Click Here](#)



Programme Recovery

5.

Programmes tend to fail for the same reasons

Since 2004, our PPM Global Survey has uncovered the key reasons why programmes fail to deliver – and the same themes appear each time

Poor estimates in the planning phase

Changes in programme or project scope mid-way through delivery

Insufficient resources and capabilities in the delivery team

Lack of alignment or visible benefit to organisational strategy



Of Programmes have immature or ad-hoc links between its objectives and organisational strategy



Of key decisions are made with objective criteria and quality data behind them



Of PMs say there is no clear accountability for decisions that enable delivery

Our approach to rescuing your programme

In a nutshell:

Our four phase Project Recovery framework rapidly addresses the root causes of programme failure, and provides the leadership and expertise to place a project firmly back on track and salvage current and future investment.

Four stages...



1. Stabilise

Take immediate action to stabilise the programme and buy time for long-term fixes. Quick wins, removing roadblocks, and re-building support are priorities to get the programme back on track.

After the right data has been collected and the critical issues facing the programme have been identified, develop a focused action plan to put the programme back on solid ground.



3. Reposition

2. Analyse



Once stabilised, conduct a more in-depth assessment of the programme. Challenge assumptions around programme and benefits and identify the root causes of the most critical issues facing delivery.

Agree the recovery plan with key stakeholders and start implementing changes to processes, tools and governance. Remaining root causes are to be addressed aggressively as the programme returns to a normal status.



4. Action

...addressing key issues...

Before

After

Unclear vision, objectives or direction	Provides clarity on programme to allow leadership to make key decisions
Cost, time or quality controls failing	Root causes of programme issues are identified and addressed
Lack of coordination within or between programmes	Leadership has control over the programme and interdependencies
Inadequate focus on benefits	Programme focus is realigned to strategic needs and required benefits
Expectations and actions not defined or understood	Stakeholders are re-engaged with the programme and understand their role

... and supported by experience



We know there are many dimensions to the effective delivery of programmes. Our 12 Elements of Delivery Excellence model brings these together to provide a holistic way of thinking about what's critical to a successful portfolio or programme, and underpin our approach to everything we do.

How we can help you get back on track

Programme Recovery 1 2 3 4



STABILISE



Core activities

- Identify critical issues and deliver immediate 'quick wins'
- Re-engage key stakeholders
- Assess strategic fit and make "continue/discontinue" decision

Moments that matter

We help identify and deliver quick wins that 'stop the bleeding' and allow you to focus on long-term solutions

What you get

- Stabilized environment
- Quick-Wins
- Regular Executive summary reports and presentations



ANALYSE



- Analyse critical issues and identify root causes
- Re-assess programme business case, assumptions, benefits, etc.
- Develop mitigation plan

We take a complete look at your programme and deliver a 'single version of the truth' regarding its status

- Detailed Assessment Report
- Mitigation Plan
- Risk Inventory
- Interdependency Map



REPOSITION



- Develop revised programme plan, processes and governance
- Secure necessary resources
- Finalise recovery plan

Using our analysis, we help you build a targeted plan to address the underlying causes of failure and build a more robust programme

- Revised project plan
- Mature status reporting
- Regular Executive summary reports and presentations
- Steering Committee Presentations



ACTION



- Enact agreed recovery plan to address root causes
- Begin regular, robust reporting
- Review recovery and capture lessons learned

We help you deliver the improvements and interventions identified in Stage 3 and return the project to 'normal' status

- Regular assessment reports
- Regular Executive summary reports and presentations
- Steering Committee Presentations

What does working with PwC feel like?

'Righting the ship' with National Curriculum Testing

Client issues

In 2008, the National Curriculum Test (NCT) process failed, leaving 1.2m pupils waiting months for their test results.

To avoid an embarrassing repeat in 2009, the Qualifications and Curriculum Development Agency (QCDA) asked PwC to support their internal management in delivering tests and results to 16,000 UK schools.

Project objectives and approach

Our aim was to create a culture of high performance where missed milestones and poor quality deliverables would be challenged effectively. We accomplished this by:

- Building and deploying a comprehensive management information system to track progress as close to real-time as possible and identify and resolve issues early, and;
- Developing a dedicated and high-performing team with a mantra of "close to zero" – setting a target of 100% performance for every activity and challenging assumptions that any level of exception was acceptable.

We provided specific technical expertise around risk management – setting a strong example of how to effectively manage risks to delivery – and supplier management – fully integrating seven key suppliers into the process.

Benefits to our client

- In 2009, the team delivered 99.98% of results on time, beating the 99.7% target set by the Department of Education. In 2010, the team achieved an unprecedented 100% on-time score
- Underlying processes and reporting were improved, setting the team up for sustained success
- Morale among the QCDA's staff dramatically improved, resulting in an enthusiastic and resilient team ready to hold each other to a high standard

Why PwC?

We understand what makes business transformation programmes successful: from programme delivery structures and business engagement models to key technical issues and ongoing learning and improvement.

We are committed to sharing our knowledge and experience with your team, to compliment your existing capabilities and propel you to the next level of Portfolio delivery.

"This level of success would not have been achievable without PwC. PwC integrated so well that they have really become part of the team; given the context this is truly exceptional." - Executive Director, QCDA

Engagement facts



Duration
Nov '14 – Nov '17



Territory
United Kingdom

Key outcome:

Our client has the capabilities and confidence required to deliver £1bn+ in benefits

For further information on this offering, [Click Here](#)



Benefits Management

6.

Benefits Management answers critical questions...



...they are the objective of any transformation

In a nutshell:

Benefits Management sits at the heart of successful change, and delivers value through supporting focused, informed and fact-based decision making - before, during and after the actual change takes place.

Four stages...

Identify

Understand the Programme/Project context and how it contributes to the broader business strategy. Identify the benefits and dis-benefits at a sufficient level of detail to inform the initial business case



Plan

Identify the 'Who, what, why, where, when and how' for each benefit, and develop a full benefits realisation plan that is aligned to broader programme and portfolio plans



Realise

Deliver the changes required to support benefits realisation. Begin to monitor and report progress, and continually update the realisation plan and benefit profiles when new information becomes available.



Evaluate

Assess the performance of benefits against the realisation plan. Understand and give early warning to whether project outputs are enabling change and delivering benefits, and take corrective action if needed



...addressing key issues...

Before

After

Poorly articulated benefits

Clear view of each activity's contribution towards overall benefits

Incomplete reporting and tracking

Data and reporting supports effective decision-making

Long-term benefits not delivered

Increased confidence that long-term benefits will be sustained

Difficulty making change 'stick'

Governance, culture and behaviours aligned to deliver benefits

Unclear ownership and accountability

Transparency on who owns and is accountable for planned benefits

... and supported by Amplify

Amplify is PwC's cloud-based platform that provides a simple and scalable solution to help you identify, plan and realise and evaluate the benefits of your change programmes.



Helping you realise your benefits in four key steps

Benefits Management 1 2 3 4



IDENTIFY



Core activities

- Understand programme context
- Identify outcomes and benefits
- Assign benefit management roles
- Analyse, qualify and baseline benefits

Moments that matter

We work with you to ensure both stakeholders and your change team have a shared understanding of planned benefits and how they relate to your strategy

What you get:

An actionable framework and baseline for qualifying and prioritising benefits



PLAN



- Confirm benefits dependency map
- Update benefit profiles and assign ownership
- Develop a benefits realisation plan

You have confidence and clarity on how to deliver your planned benefits and how success will be measured

A complete view of what your planned benefits are, where they come from, how they link together, and the actions needed to make them a reality



REALISE



- Deliver changes linked to benefits realisation
- Track, measure and monitor benefits

Your tracking and reporting mechanisms are fully operational and you begin to see the full picture of progress towards benefits across your organisation

Functioning, evidence-based mechanisms for tracking and measuring benefits, supported by the right behaviours



EVALUATE



- Evaluate benefits realisation results
- Evaluate lessons learned and future actions

We work with you to review progress against the plan, manage any issues, evaluate 'lessons learned', and identify new benefits to feed back into step one

A view of your benefits management performance and contribution to strategy so far, and a clear forward view of how to keep improving

What does working with PwC feel like?

Benefits management for a UK Defence agency

Client issues

We were engaged to support a multi-£m transformation programme over a 3-year period, and as part of our role addressed some key benefits management issues:

- Significant cost challenges from Government making benefits delivery critical
- Lack of standardised approach to benefits management
- Lack of confidence around affordability and ability to achieve benefits over a 10 year period

Project objectives

1. Provide a clear view of how the programme’s 43 projects link to organisational strategy
2. Design and implement a common benefits framework
3. Provide full cost-benefit analysis to demonstrate value of the change programme
4. Establish central benefits dashboard to monitor benefits and provide a “point of truth”
5. Identify new benefits and provide early warnings of threats to benefits realisation

Our approach

1	Identify Build clear picture of required benefits	2	Plan Baseline benefits and build realisation plan	3	Realise Implement plan and establish monitoring tools	4	Evaluate Review progress, reflect, and re-plan
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Benefits to our client

- We helped our client develop a full suite of benefit profiles for the transformation programme, totalling over £3bn+ in achievable savings over 10 years
- Client now has a standardised approach to benefits management, including monitoring through an interactive dashboard, stakeholder engagement, and delivery planning
- Clear links between strategy, transformation activities, business changes and end benefits

Why PwC?

We understand what makes business transformation programmes successful: from programme delivery structures and business engagement models to key technical issues and ongoing learning and improvement.

We are committed to sharing our knowledge and experience with your team, to compliment your existing capabilities and propel you to the next level of Portfolio delivery.

Engagement facts



Duration
Nov '14 – Nov '17



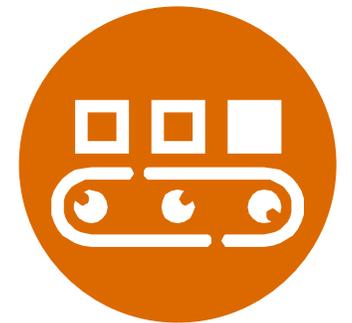
Territory
United Kingdom

Key outcome:

Our client has the capabilities and confidence required to deliver £1bn+ in benefits

For further information on this offering, [Click Here](#)

Our tools and enablers



Transform *Our global methodology*

Overview

Transform is the place to go to find the guidance, expertise, templates and tools you need to deliver the highest-quality service.

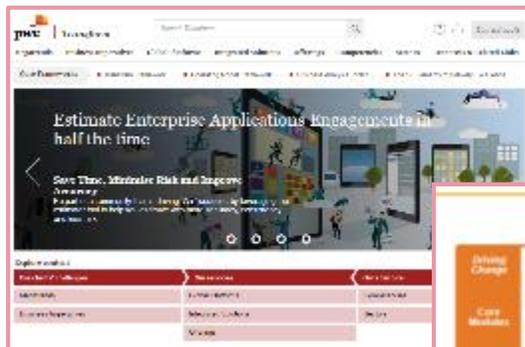
The Transform Framework underpins all of our work, and provides a proven route from Strategy to Execution that can be scaled up or down for any engagement. In PPM, all of our work is built upon the 12 Elements of Delivery Excellence, which provide a methodology-agnostic way of thinking about the most critical factors for programme / portfolio success.

Using Transform allows us to:

Connect our different skills, processes and experiences to capture the most value possible for our clients;

Deliver seamless, consistent quality and value to clients across the globe through a universal shared language and approach.

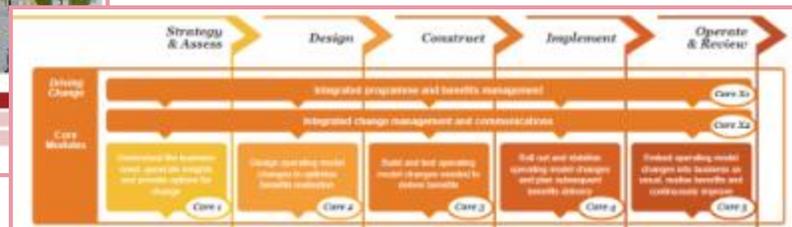
Offer a proven framework for delivering end-to-end results and benefits which are sustainable after implementation programmes are complete.



Screenshots from Transform online

Ready?
Click [here](#) to launch Transform

Want more?
Click [here](#) for info on the 12 Elements



Benefits of Transform

Detailed methodology

No matter the client or context, the Transform framework provides a detailed route through all stages of the engagement, from strategy through to execution. Teams can use the methodology as a whole, or extract and develop the areas that are appropriate to the engagement.

Tools and Templates

Transform holds tried and tested content that helps practitioners bring the best of PwC to every engagement. Tools and templates can be tailored to a specific industry, competency and client operating environment so teams always have the appropriate material for their needs.

Benefits at the core

Programme and Benefits Management is at the heart of our approach, meaning that we believe our Benefits thinking should be embedded into every aspect of the program and portfolio work we do.

Specialist expertise

“Scope specific” modules provide our teams with access to more specific skills and methodologies, which may be appropriate for a specific engagement, client or industry.

The 12 Elements of Delivery Excellence

All of our work is underpinned by practical experience

We know there are many dimensions to the effective delivery of programmes. Our 12 Elements model sits at the heart of our offerings and outline the key elements of what a successful project, programme or portfolio should look like.

If each element is undertaken well, a portfolio or programme function should deliver:

Insight

Effective reporting that tracks all strategic change initiatives with tailored communication to stakeholders

Control

Controlled implementation in agreed timelines

Efficiency

Identify and eliminate overlap and exploit synergies leading to efficiencies and savings

Alignment

Connects execution with strategic direction



The 12 Elements of Delivery Excellence

Insight

Engaged stakeholders

Identifying and managing stakeholders so that they are committed, appropriately informed and contribute to the success of the programme.

Governance-enabling decision-making

Enabling leaders to govern with confidence, making timely decisions using high quality management information.

Alignment

Clear Scope

The scope of the programme is defined, complete, communicated and agreed and it supports the objectives of the business strategy.

Focused benefits management

Developing a realistic business case subjected to an appropriate level of challenge with benefits clearly defined, owned and tracked.

Efficiency

Embedded lifecycle assurance and learning

A clear assurance plan has been defined which outlines the nature, timing and extent of planned assurance, quality reviews and embeds learning.

High-performing teams

The programme team is highly motivated, has the right blend of skills and personalities and the organisation supports the team to deliver.



The 12 Elements of Delivery Excellence

Control

Managed risk and opportunities

Making certain that there are effective risk identification processes in place and that the key risks are mitigated and opportunities taken.

Active quality management

An agreed quality plan has been developed based on appropriate standards, it is communicated and the right behaviours are in place.

Smart financing

Establishing the budget and associated policies, processes and reporting standards for effective cost estimation, programme financial management and reporting.

Agile change control

A formal process is in place for controlling changes to programme scope according to the programme's principles and this has been communicated to the programme stakeholders.

Delivery-enabling plans

The plans in place must be realistic, achievable, understood and bought into by key stakeholders and suppliers.

Integrated Suppliers

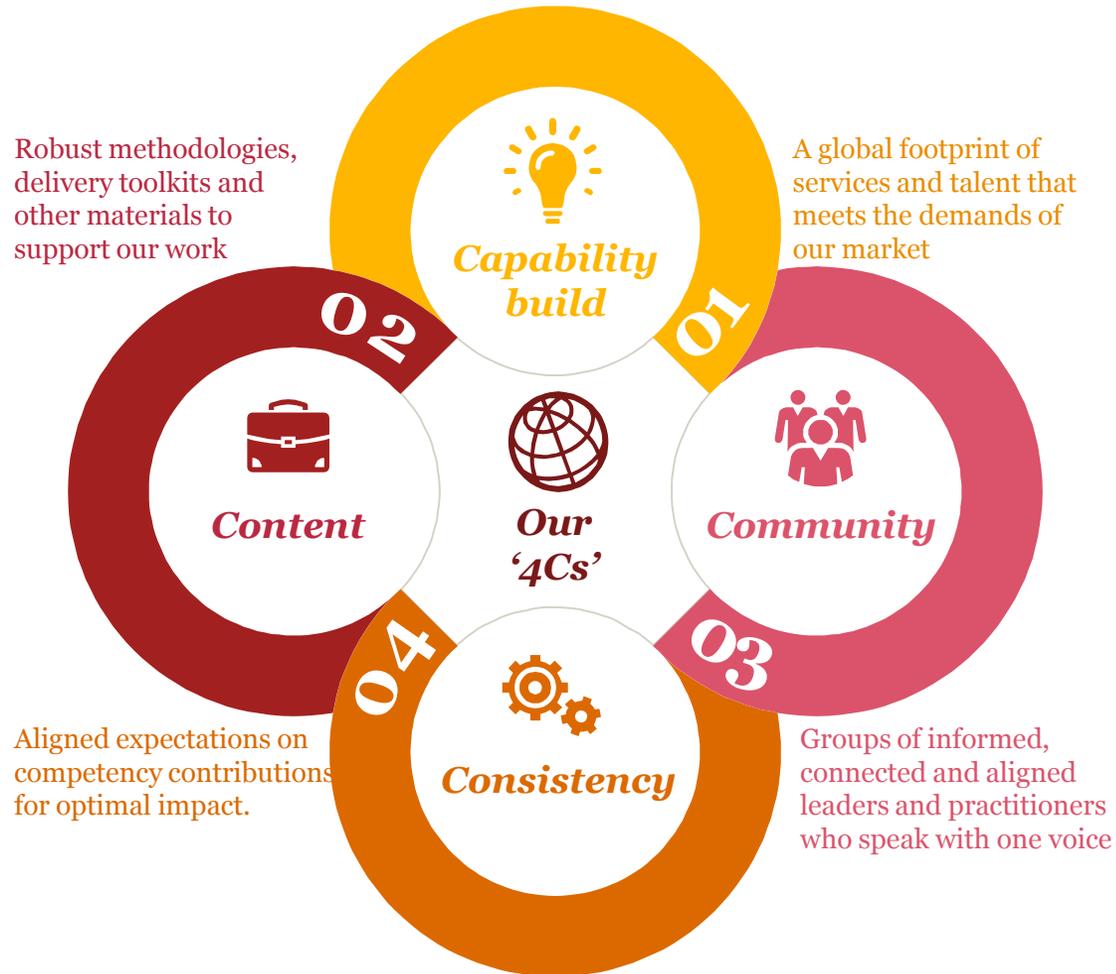
An effective approach has been taken to engage with suppliers, including adequate governance of their activities.



People & Networks *A valuable asset*

Our People

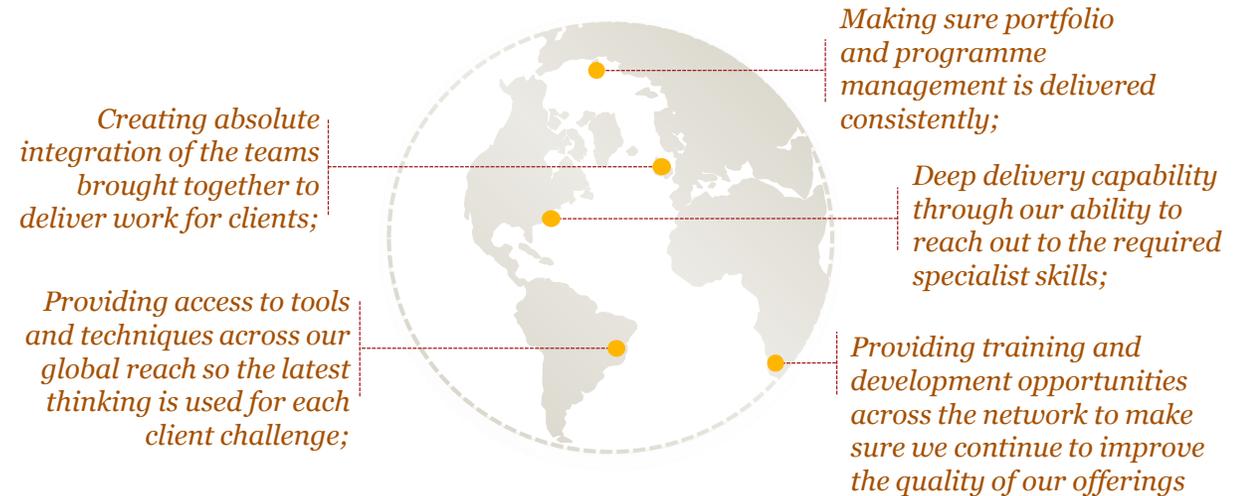
With over 1,400 practitioners worldwide, our PPM community is one of our most valuable assets, and we support this along four key principles:



Our Network

PwC's global network stretches across 154 countries and is made up of over 161,000 partners and staff. It is one of the strongest and most complete networks of any professional services firm, and is essential in helping us give clients top quality services, wherever they may be.

Our global network strengthens our delivery capabilities by:



PwC continually leads programme management best-practice through our global partnerships with industry leaders and professional organisations such as Programme Management Institute (PMI), Association for Project Management (APM), Major Projects Association (MPA) and academic institutes such as Cranfield Business School.

Digital PMO *Digitally-enabled programme management* **1** **2** **3**

Overview

Digital PMO is our Transform-powered Cloud toolkit that enables real-time decision making, proactive project, programme and portfolio management, and seamless collaboration across the business.

It provides a Transparent management environment that creates a step-change in programme effectiveness. It allows all levels of the organisation to view, interrogate programme information to ensure focus remains on delivery.

PwC have selected two preferred, alternative solution options within the DPMO suite (Cora ProjectVision and Smartsheet) to support different client requirements.

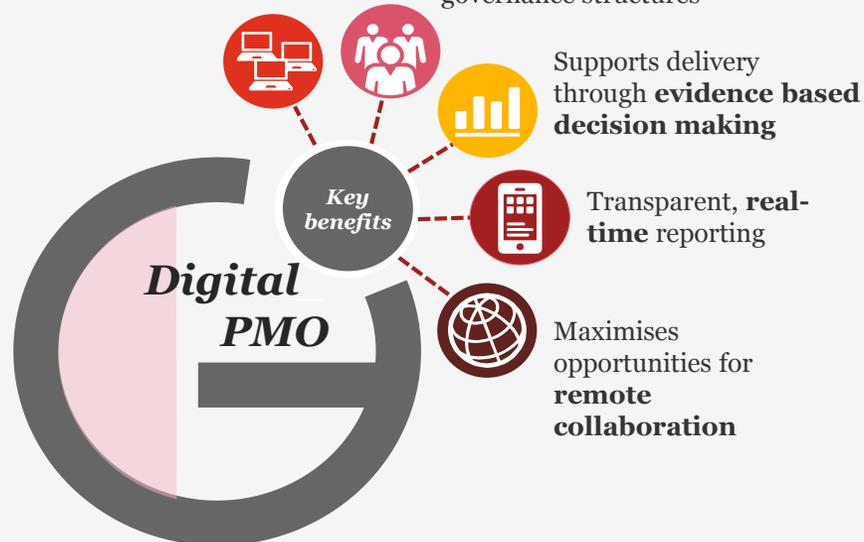
Enables a **common, standardised approach** across programmes

Enables **centralised management** of complex governance structures

Supports delivery through **evidence based decision making**

Transparent, **real-time reporting**

Maximises opportunities for **remote collaboration**



Benefits

For programme management professionals, it provides a market leading toolkit that increases the value we can deliver to our engagements.



For our clients, it provides a robust programme management toolkit that embeds PwC's experience of good practice PMO to increase the probability of delivering programmes to budget, time and quality.

For PwC, it widens our breadth of delivery capabilities (i.e. PMO as a service, Hybrid PMO), differentiates our PPM capability in the market, and enhances sales and profitability by improving the quality and predictability of engagement delivery.



Our service (across the lifecycle)



Strategy and Assess:

- *Evaluating DPMO* - We can assess the value of DPMO for our clients, as part of a 'client side advisory' role
- *Implementing DPMO/ Mobilising DPMO* - We can implement DPMO for our clients and/or internal delivery teams, using our accelerators and configuration knowledge to implement the toolkit to our client's needs, and mobilise client and internal teams alike on the solution.

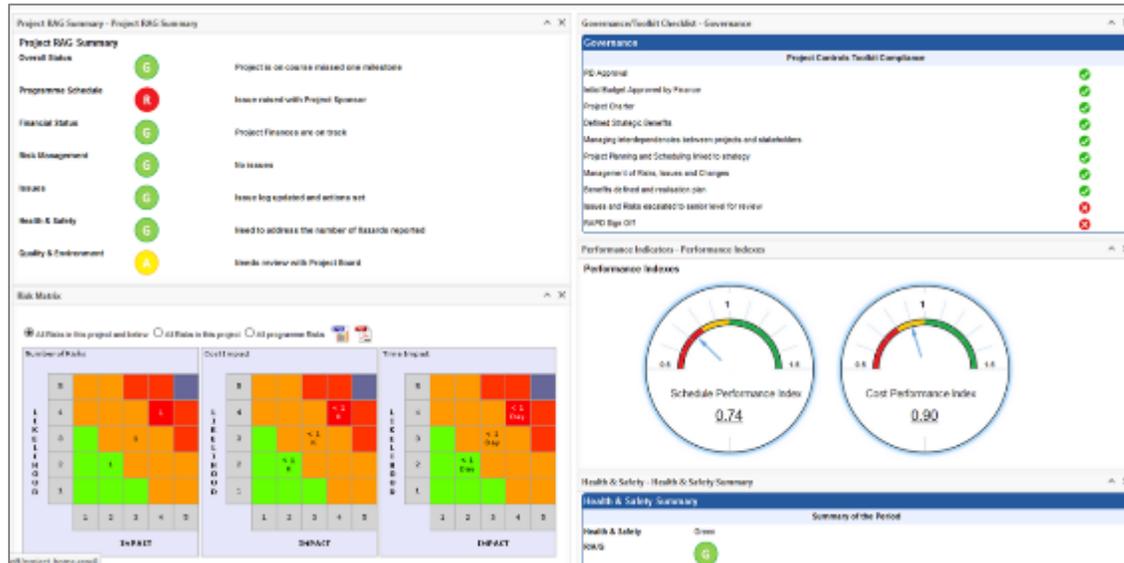
Design/ Construct/ Implement

- *Programme Delivery Execution* - We can deliver programmes using the DPMO tools, offering enhanced efficiency, control and insight from the tool

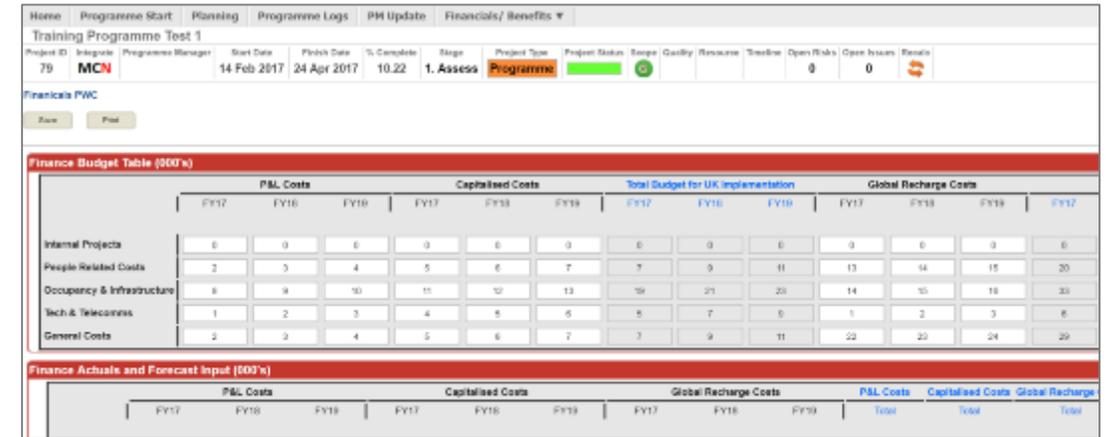
Digital PMO Digitally-enabled programme management 1 2 3

Preferred Solution 1: Cora ProjectVision*

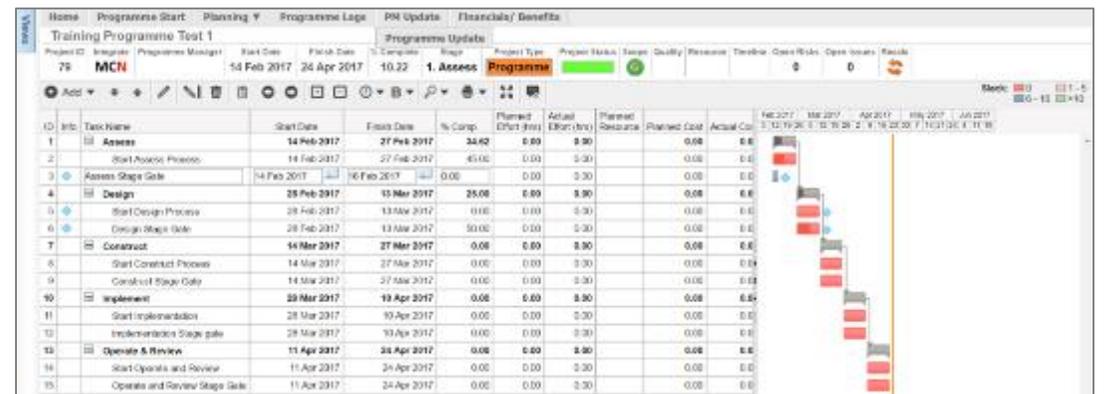
Sample Dashboard



Financial Controls



Project Schedule and Gantt Chart



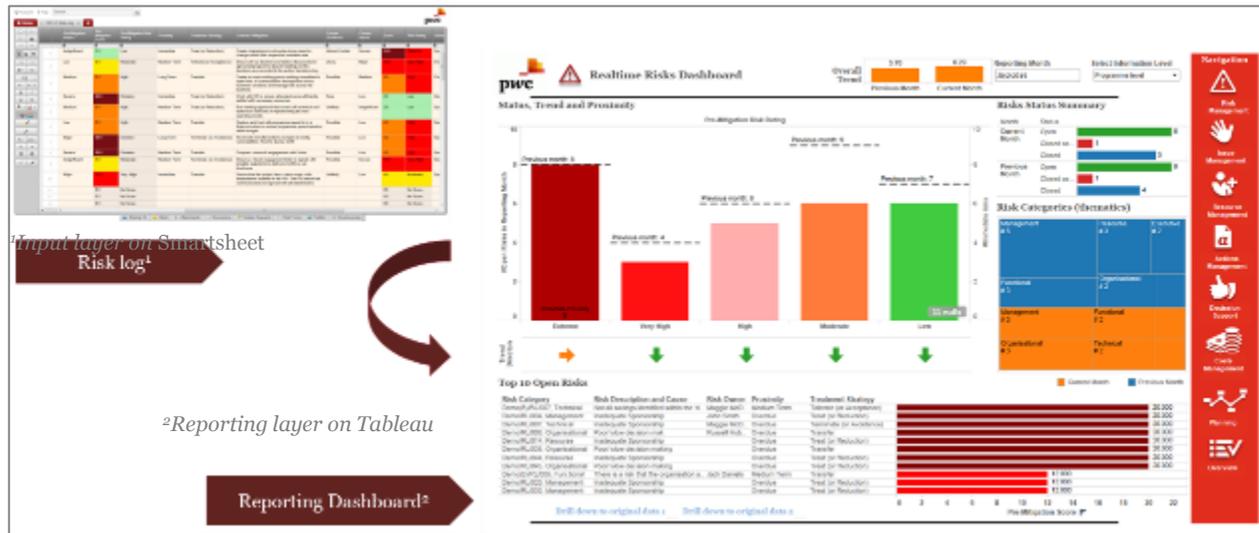
* Solution options selected based on client need

All screenshots are of genericised content for SAMPLE purposes only

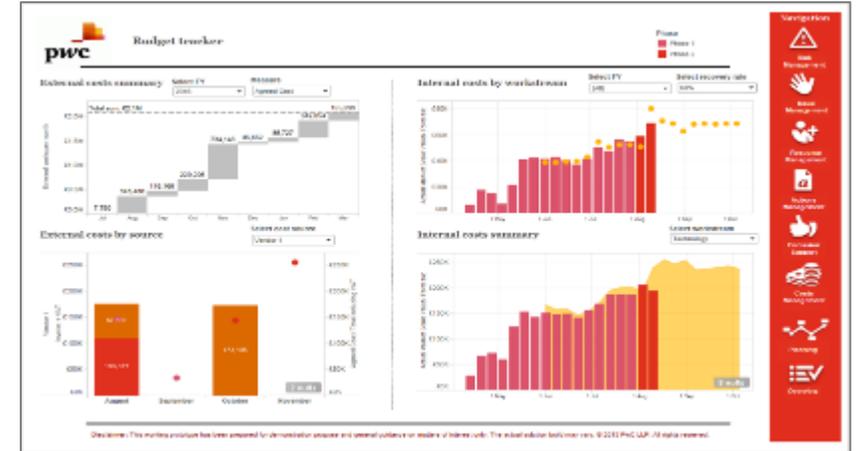
Digital PMO Digitally-enabled programme management 1 2 3

Preferred Solution 2: Smartsheet and Tableau*

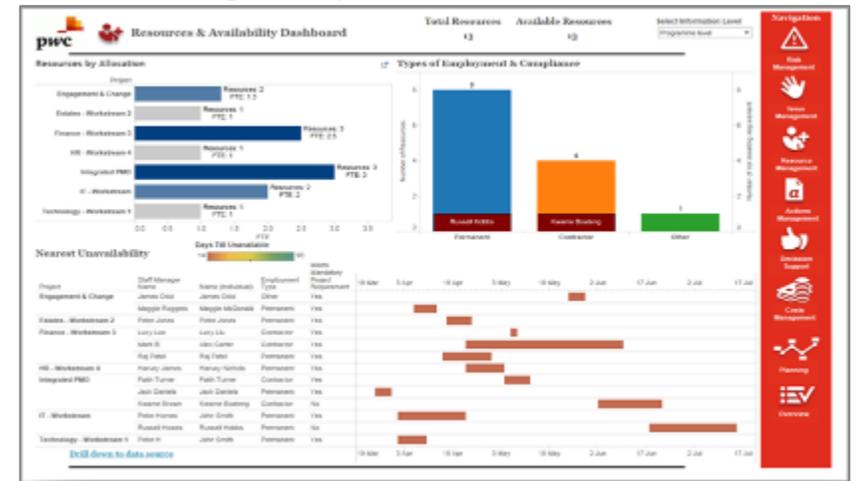
Risk Log and Dashboard



Budget Reporting



Resource Reporting



* Solution options selected based on client need

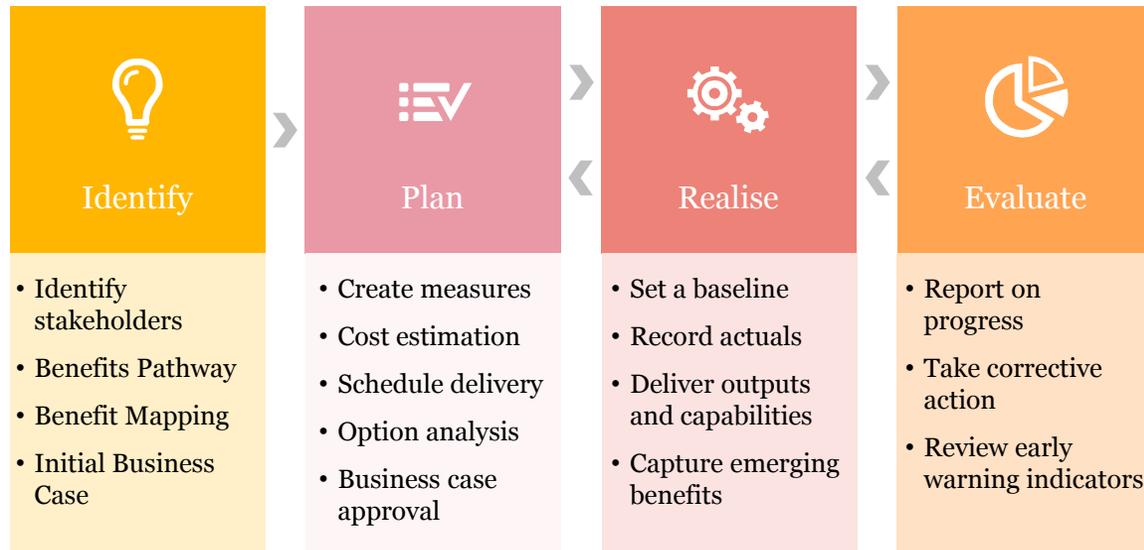
All screenshots are of genericised content for SAMPLE purposes only

Amplify *For benefits realisation* **1** **2**

Overview

Amplify is our cloud based platform that provides a simple, scalable and manageable approach for our clients to identify, plan and realise the benefits of their change programmes.

Amplify is built on our four-stage benefits management approach, and makes it easy to stay focused on both financial and non-financial benefits throughout delivery.



To see examples of Amplify in action, [click here](#)

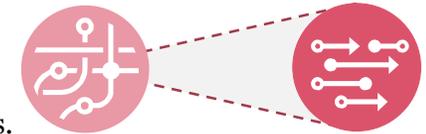
Benefits

Facilitates stakeholder engagement and personal ownership of change with clear stakeholder mapping, collaborative problem definition, and transparent progress-tracking.



Provides real-time updates and early-warning indicators for benefits realisation, enabling rapid corrective action to keep initiatives on track.

Captures the complex relationships between benefits, capabilities, customers, sponsors and initiatives, and supports continual evaluation and re-engagement with project plans and business cases.



Project Success



Provides a direct link between project outcomes and organisational strategy, increasing the odds of success by **50%**

Source: "Pulse of the Profession", Project Management Institute, 2015

Our service

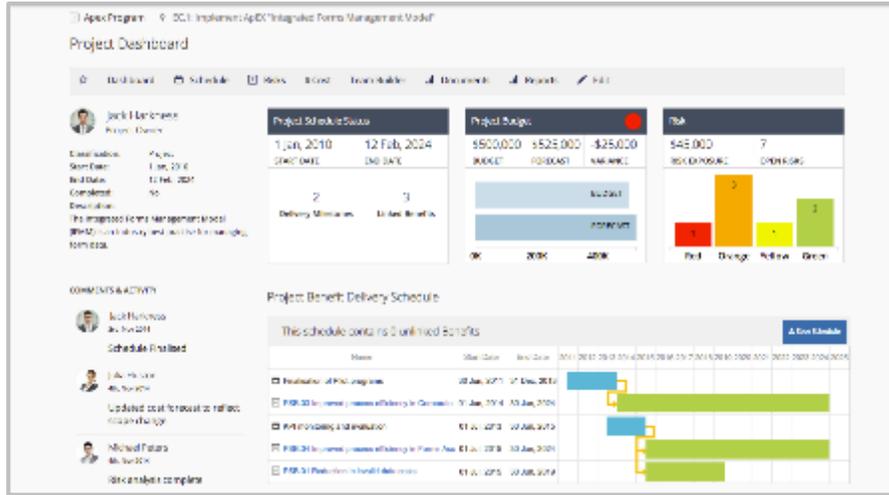
Amplify is built around our iterative Benefits Realisation Management approach, and helps us deliver our market-proven expertise to our clients.

For more information on how we deliver benefits management, [click here](#)



Amplify For benefits realisation 1 2

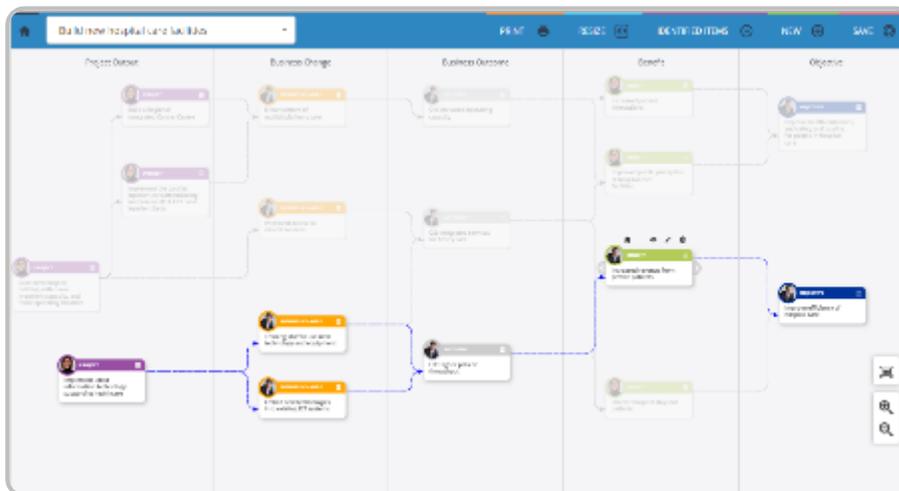
Project Status Dashboard



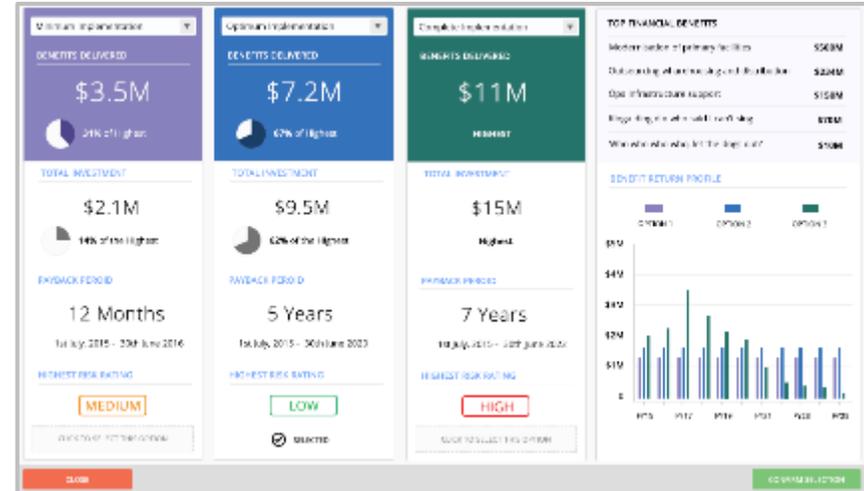
Benefit Profiles



Benefit Value Chain



Options Analysis



Mission Control For complex programmes 1 2 3

The problem



75% of Capital Projects experience budget overruns

Half of cost overruns are greater than **50%**



Average delay **23 months**

15% drop in share price **3 months** after delay is announced



Source: PwC, Correcting the Course of Capital Projects, Oct. 2013



Our solution

Mission Control is our performance management solution for large-scale portfolios and programmes. It utilises PwC’s best practice expertise to deliver better insights, greater control, and optimised performance for major capital expenditure.

It holistically addresses the building blocks of high performance, integrates performance management across the programme lifecycle, and makes sense out of complexity to provide a single source of trusted programme information.



Our cutting-edge digital platform integrates all reporting sources into a “single version of the truth” to support decision making



Mission Control *For complex programmes* **1** **2** **3**

Benefits

Mission Control can help transform reactive management to proactive management, and delivers four key benefits:

Control



- Transparency through the programme from top to bottom and across the entire lifecycle
- Critical Path visibility
- Greater trust in data, metrics and information

Insight



- Decision support enabled by new information
- Simplifying complexity, showing what's important
- Proactive management and investigation
- Forward, not backward looking

Performance



- Greater progress on Critical Path
- Capacity creation through removal of onerous reporting
- Greater schedule adherence and improved cost performance
- A new performance culture

Value



- Reduced spend on schedule delays
- Greater confidence in delivery
- Strengthened relationships throughout the Value Chain
- Customers have greater confidence

Mission Control can deliver

5% cost saving & **1%** time saving

- worth **£120m** for a typical **£2bn, 5-year** capital programme

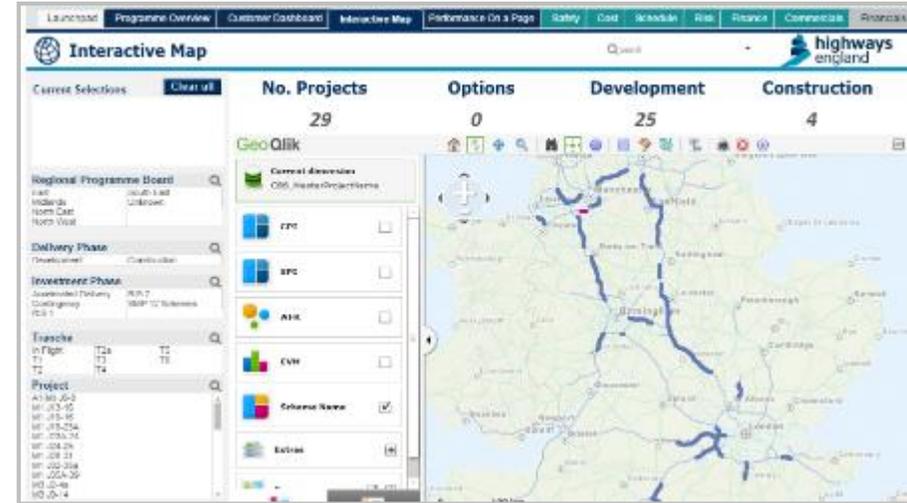


Mission Control *For complex programmes* 1 2 3

Sample Dashboard



Interactive Visualisations



Financial Controls



Product breakdown

