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BEST PRACTICES IN PROGRAM MANAGEMENT

eMentum consultants have been providing program and project management support to the Federal and commercial communities since 1999, and many of our senior leaders have more than twenty-five years of experience in their areas of expertise. This paper is the distillation of that experience into several key points that have helped us maintain happy and successful clients despite highly challenging situations.

Definitions

To support the discussion of best practices, a common understanding of some key terms is needed.

Portfolio: A group of planned initiatives, programs, projects, and ongoing services that are treated to a systematic analysis of information technology investment scenarios and decisions. At any point in time, there will be investments in each stage of planning, delivery, sustainment, and retirement.

Program: A group of related projects that are treated as a cohesive unit to better manage their interdependencies, to better control the delivery and outcomes, and to increase the benefits over what may be received if the projects were managed individually.

Project: A planned piece of work that has a specific timeframe and specific deliverables or outcomes. Each project, regardless of whether it is technology based or not, proceeds through a service delivery lifecycle from planning through closure.

Release: A holistic delivery of software and/or other products for general use, including the transition from development, testing, and deployment to a customer support structure and all of the related activities accompanying this transition.

Our Best Practices

In our white paper entitled “Why do I need a Program Management Office (and how do I get one)?” we explained the difference between a traditional PMO and a ‘lean’ PMO. Regardless of which model is followed and regardless of what type of projects your PMO is managing, several best practices hold true.

Governance Owns The Iron Triangle: The iron triangle, also known as the triple constraint, is that immovable structure of time, funding, and scope/quality that defines any program, project, or release. A change in any one of these dimensions will automatically impact the others, requiring them to always remain in synch for the duration. The owner of the iron triangle, and the party authorized to change it, is the governance team, not the program or project manager, because they are ultimately accountable for the success or failure of the program. The most common decisions that a person in this role may encounter are:

- A need to prioritize the requirements into projects and to determine the order in which projects are delivered.
- A request to increase (or decrease) the requirements to be delivered in a release, along with the collateral impacts to budget, schedule, and user satisfaction.
- A choice between options presented to resolve an issue the delivery team is encountering.

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- A judgement on whether one or more issues raised by the user community must be resolved in this release or may be deferred.

These decisions are not always straightforward, especially for governance team members who may not be comfortable with questioning their IT Departments, but the Program Manager's role is to provide facts and supporting information to facilitate these decisions.

Be Continually Available: I have heard it said that, if your client cannot see you, your client does not believe that you are working for him. This may not be entirely accurate, but it does have a strain of truth to it. A Program Manager needs to be available if and when the project teams or stakeholders need support, and right or wrong, a lack of 'personal touch' impacts how the stakeholders rate the service and support being provided. This does not mean that the most junior administrative person is on site while other team members work remotely or split their time with other assignments. It means that the Program Manager and senior team members are present and engaged on a daily basis to resolve issues, assess performance, respond to action items, and plan upcoming initiatives.

What Gets Branded Gets Funded: A brand gets people's attention, improves their recall, and increases stakeholder loyalty. It is a way to extend the organization commitment to a program by providing independence from a general service line or product mix. The projects are unified by a common logo, color scheme, templates, and user experience, allowing each project to benefit from the success and acceptance of earlier services. A well-branded program will no longer be tied to the life of the individual projects, but will become a platform for growth and continuous improvement as it evolves with the organization.

Keep It Simple and Clear: Stakeholders need to understand why the program exists, what it is delivering, and when these outputs will be available. If they cannot articulate this easily and effectively, they will have a difficult time gaining and maintaining sponsorship and funding for the program. The Program Manager's role is to provide 'art and charts' that explain the scope, roadmap, and approach for the program in clear and simple ways as the basis for a communication plan targeted at both executives and users. Without this essential activity, the program risks a lower user adoption rate, which typically signals future budget and sponsorship difficulties.

Control, Oversight, and Readiness: As an independent body, the Program Manager is expected to provide an impartial evaluation of how well projects are performing. As such, it performs three main functions in support of the stakeholder community:

1. Control, over budgets, schedule, scope, and quality.
2. Oversight, of delivery and release processes, portfolio performance, and service and operation levels.
3. Readiness, of the organization to deploy new products and services in a way that maximizes user benefit and minimizes user stress.

One of the Program Manager's best tools to perform these functions is independent verification and validation, or IV&V. This tool provides an objective assessment of products and services that projects are delivering by providing early detection and correction of issues, increasing stakeholder awareness of risks and issues, and ensuring compliance with best practices and approved processes. The outcomes are products that meet the business's needs with a high level of quality and reliability in the development and deployment lifecycles.

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Business Leads, Technology Supports – Not The Other Way Around: For many years, IT Departments delivered amazing solutions to business problems…except that they were not exactly what the business needed or did not exactly support the business process. So, kluges, bolt-ons, and workarounds were developed so that the business was able to remain productive. Over time, this has begun to change, but there remain numerous examples of technology projects that become 'shelfware' because the business cannot or will not use the products delivered. To avoid this, the Program Manager is responsible for making sure that the business remains in a lead role across the managed projects by defining and prioritizing requirements, actively engaging in early reviews and demos of pre-release products, and performing acceptance testing. The business must have the authority to reject a product that does not meet their needs or to shut down a project or service that is no longer performing as required. The way to maintain this standard is for the Program Manager to be accountable to the business, not the IT Department, and for the IT Department to be a service provider, not a service owner.

Sweat The Small Stuff: An attention to detail is a Program Manager's best trait. This role requires a person to sift through large quantities of information, quickly identify key items, assess whether each item can be assigned for action to another or needs to be retained, and recall these items as needed. This does not mean that a Program Manager requires a photographic memory to be successful, but all Program Managers will be faced with situations when dates, facts, and/or decisions need to be recalled so that they can be used in planning, managing, delivering, and reporting on projects. The details are important because they are the building blocks for the reputation of the PMO and its project managers as a team that can be relied upon to deliver on time, on budget, on scope, and high quality releases.

Communicate Early, Communicate Often: Any program will result in some level of upheaval for the user community, and the biggest threat to success tends to be a failure to address user concerns, as this will lead to lower adoption rates and greater resistance to change. We are all creatures of habit, so we will learn to work with and adapt to any system or process, no matter how poorly it supports the business objective. Fear prevents us from eagerly embracing a new approach, because it took us so long to be comfortable with the old approach. Starting on Day 1, the Program Manager needs to develop and implement a well-planned plan for communicating the benefits and ease of operations that will result from the new way of doing business. This message will evolve over time as the communications extend to include an increasingly detailed amount of information for an increasingly wider community of interest. This plan should include briefings, newsletters, training, user groups, and other methods for making sure that the right message gets to the right people.

Learn Your Lessons Well: No discussion of best practices would be complete without a comment on continuous improvement. At multiple stages during the program (at a minimum, for every project completion), lessons learned should be solicited, evaluated, and incorporated into the program management process and practices. This ensures that the stakeholder concerns are recognized and addressed in a timely manner, and it provides confidence that the program manager is acting in the best interest of the organization and its users.