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Selling the Value of PPM

Your Guides: Wes McCoubrie and Jacob Cancelliere

Agenda

- Key Change Agent Characteristics
- Defining Value
  - Company
  - Personal
- Promoting Value
  - Messaging Techniques
  - Marketing Strategies
  - Leveraging Executive Sponsors

Introductions

- Take 5 Minutes

- Turn to a Person Near You

- Introduce Yourself

- Business Cards

Part I:
Key Change Agent Characteristics

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So you want to be a PPM change agent?

- Know your company's culture and its traditional hang-ups.

- Understand the long-term vision and be flexible with solutions to get us there.

- Be measured, persistent, and thorough.

- Be or know a maven, connector, or salesperson.

- **Our focus: Excel at defining and promoting value.**

Open Mic?

- Are you ready to be a change agent?
- What skills are you looking to improve?

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Part II:
Defining Value

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How Do We Define Value?

- Value should include both strategic and operational elements
  - Company goals are aligned with business priorities.
  - Day-to-day PPM value typically means different things to different people.
- Align value definitions with roles:
  - Executives
  - Business Owners
  - Project Managers
  - Finance
  - Resource Managers
  - Team Members
- Automate, simplify, or provide decision support.

Examples of Quantifiable Metrics

- Define Metrics and goals for the different participants
  - Executives: Balanced Portfolio
  - Business Owners:
  - Project Managers: Improved Project Delivery
  - Finance: Better Capitalization
  - Resource Managers: Accurate Headcount Needs
  - Team Members: Work prioritization

Example Metrics

Goal	Question	Metric
Improved project delivery	What's our average time from project idea to start? What's our average time from project idea to delivery? How do our project delivery estimates compare to actual delivery dates?	Cycle time of idea to project initiation Cycle time of idea to project delivery Project end date variance compared to estimate
Better resource management	Do we have the right people in the right roles? What skills do we need to support business objectives in both the long and short term? Are expensive contractors doing inexpensive work?	Percent of roles staffed with matched skills Analysis of multi-year skills demand compared to planned capacity Delta between primary role and project role
Optimized finances	Are we overspending on projects? How can we improve ROI?	Variance between estimated budget cost vs actual cost Analysis of annual ROI of all projects coordinated by PM
Improved benefits realization	Are we achieving predicted business case benefits? Are these the right set of outcomes to achieve the business objectives?	Percent of planned benefits vs realized benefits over time
Improved Planning	How well are we forecasting for resources/budget/time?	Percent of projects affected by resource adjustments Average time by resource Average time by investment
Improved Capitalization	Are we putting costs to the right income statements?	Percent time capitalized for the portfolio Actual time capitalized vs. predicted time capitalized
Higher stakeholder/ customer satisfaction	Are our stakeholders/customers happy with our processes and outcomes?	Average project employee/customer satisfaction compared to previous years

Open Mic?

- You know the pain points in your organization but do you understand the value or removing them?

- Can you sell it?

Part III:
Promoting Value

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Messaging Techniques

Know Your Audience

- Put yourself in their shoes to understand what will resonate.

- Know if they're quantitative or qualitative.

- Tailor communications by role but be sure to focus on a common theme.

Quantify Value

- Wherever possible, quantify or – better yet – monetize the metrics.

- If a new, consolidated status report saves PMs 30 minutes / week, highlight that as a $1,000 per week saving (20 PMs).

Trend Reporting

- Present trend reports with a focus on growth over a well-defined maturity curve: visibility > management > control.

- Highlights success in implementation and adoption.

Enforce Decision Support

- Put PPM reports and data on critical path for management reporting.

- Enforce it as a decision support tool.

- Engrain PPM data as a part of the operating model for the organization in making decisions and setting prioritization.

Support with Mentoring

- Embrace the emotional reactions with personal attention.

- Schedule follow-up sessions within two weeks of initial message.

- Collect and actively implement feedback from these sessions.
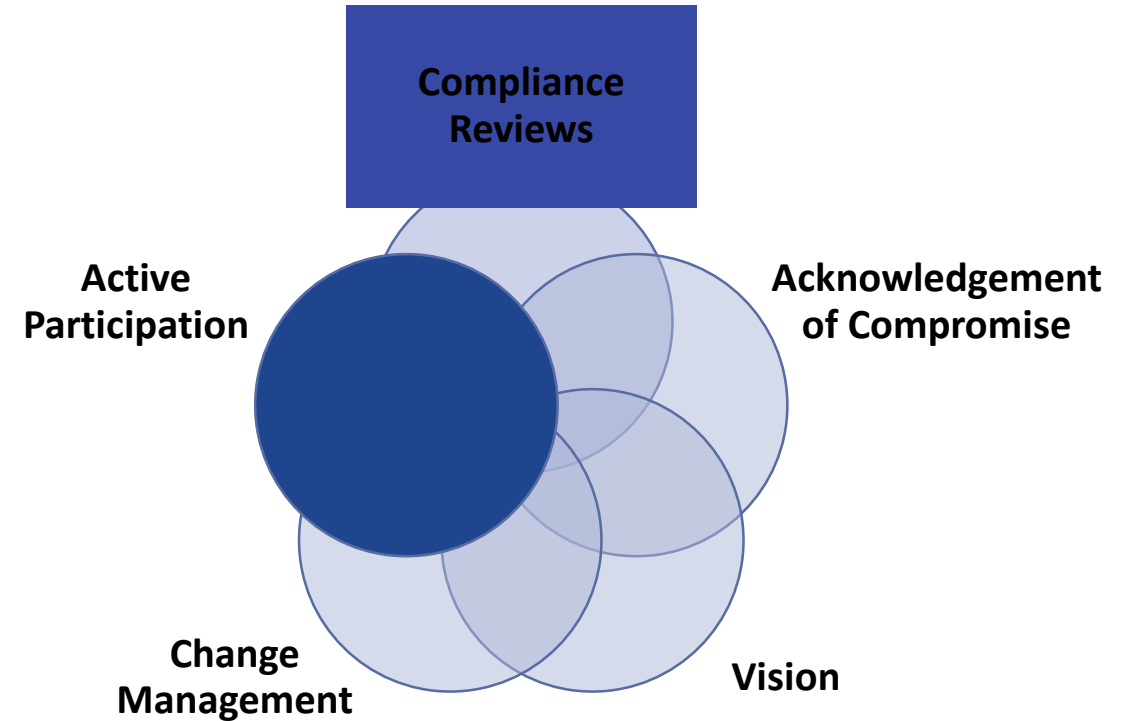
Marketing Strategies

Marketing Strategies

- ## Have Fun!
  - Gamification

- ## Themes / Branding
  - Creating a brand around the deployment helps gain momentum and improve initial perception.
  - Show growth over time
  - E.g., Star Wars, Garden, Mustang

- ## Identify Current Areas of "Pain"
  - Identify current areas of pain and how solution will mitigate and solve management and user issues.

- ## Name Recognition
  - Demo day
  - Early adopters
  - Real stories and sound bites

# Leveraging Executive Stakeholders

Leveraging Stakeholders

- Be a visible and participant in the process.

- Attendance at PM, RM, PMO Forums.

- Included on distribution lists.

Compliance Reviews

Active Participation

Acknowledgement of Compromise

Change Management

Vision

Leveraging Stakeholders

- Develop targeted compliance reports with a broad distribution list.

- Make report review a key stakeholder responsibility.

- Don't just scheduled a report, get 5 minutes on a weekly / monthly agenda to discuss trends.

Compliance
Reviews

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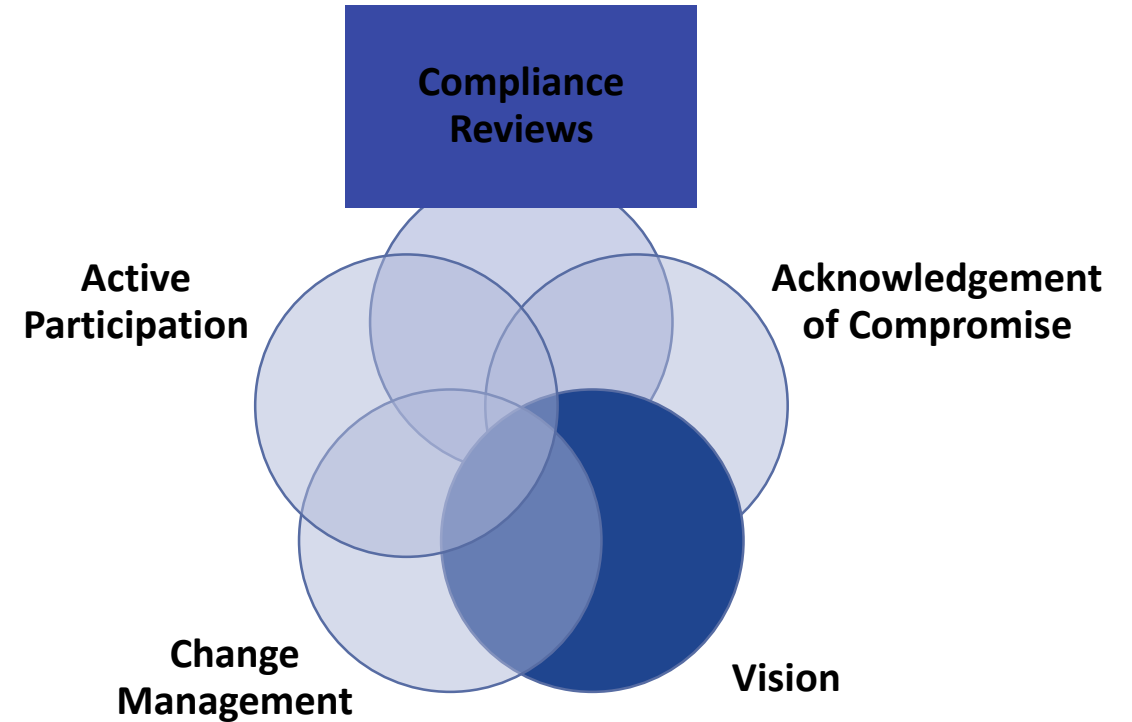
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Management

Vision
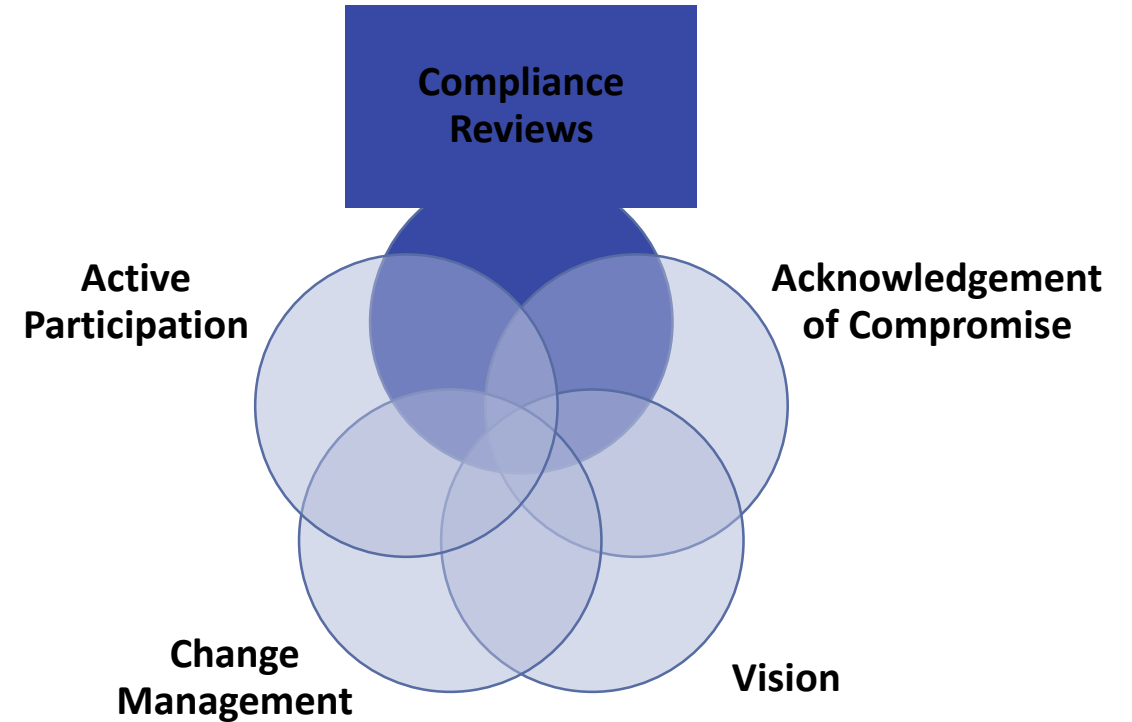
Leveraging Stakeholders

- Identify and promote areas in which stakeholders have compromised to support the success of PPM.

- Example #1: Agreeing on a simplified, standard status report.

- Example #2: Moving out of email and into CA PPM.
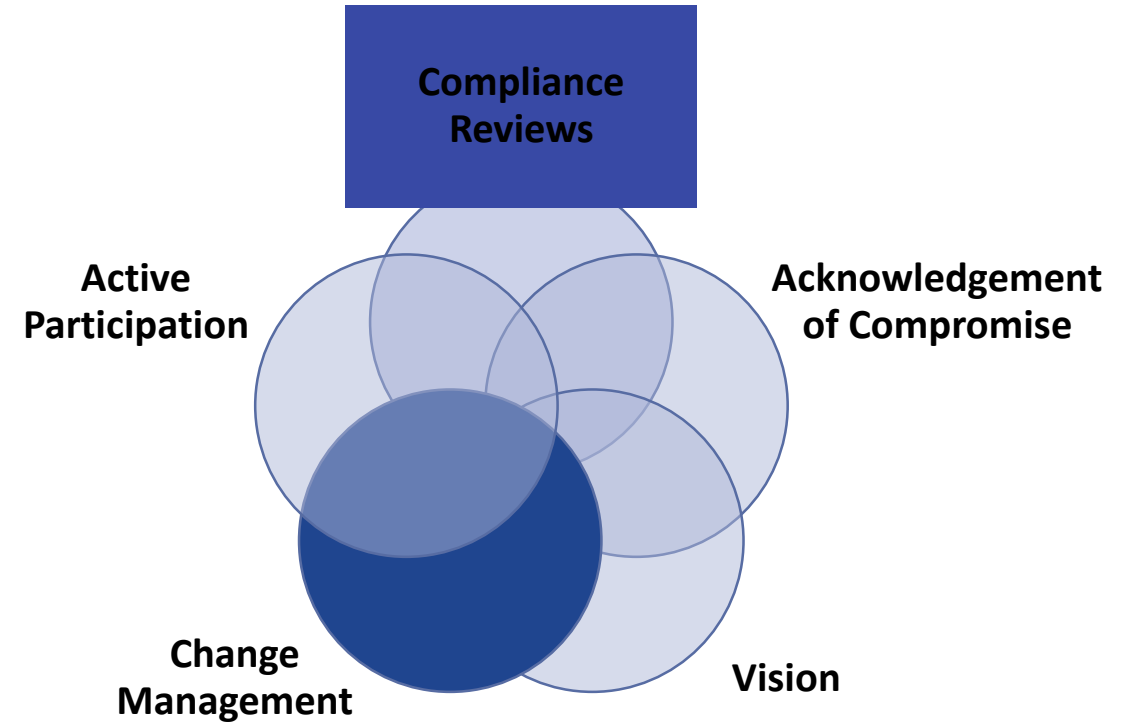
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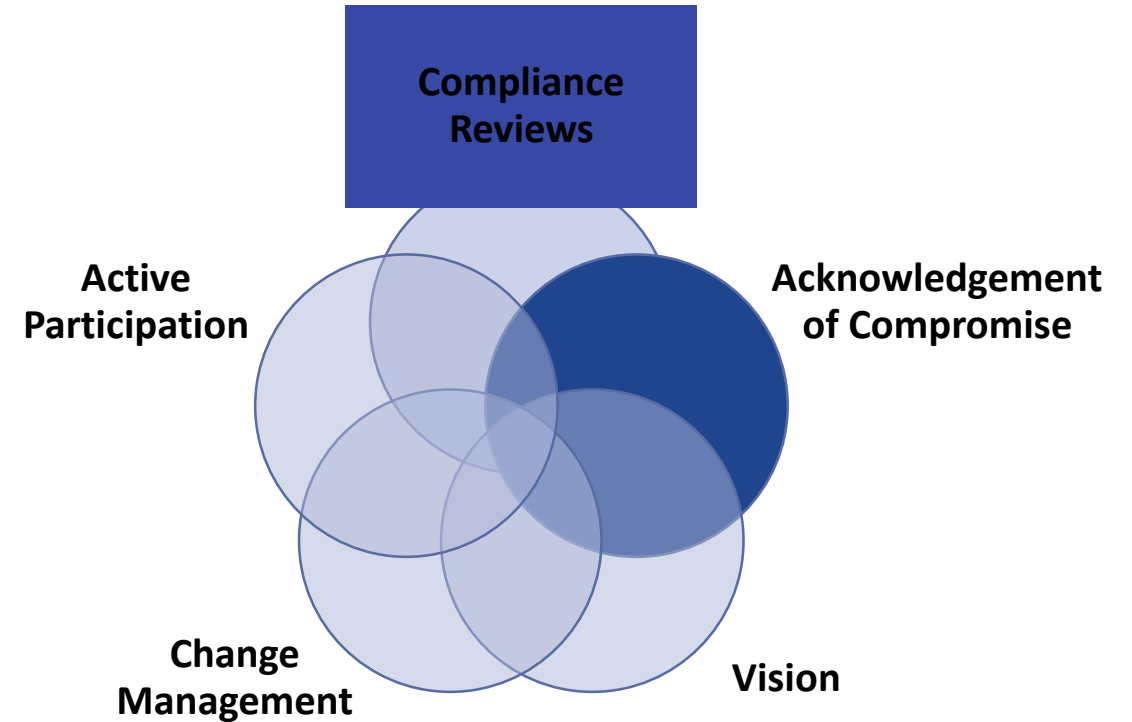
Leveraging Stakeholders

- Collaboratively develop a strategic roadmap for PPM's people, process, and technology.

- Ensure it's promoted as the stakeholder's vision, not the PMO's.

- Roadmap provides goals around which participants can rally.

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- Empower stakeholders to be change agents.

- Take ownership of specific enhancements.

- Deliver release notes.

- Attend kick-off sessions for training.

Compliance Reviews

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Questions?

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- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
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Phone
888.813.0444

Email
info@regouniversity.com

Website
www.regouniversity.com

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