

The background is a wide-angle photograph of a mountain range. In the foreground, a hiker with a large orange backpack stands on a rocky outcrop, looking out over a valley filled with green pine trees. The middle ground shows rolling green hills and a dense forest. In the background, rugged mountain peaks are visible under a sky with scattered white clouds. In the top left corner, there is a semi-transparent blue geometric overlay consisting of interconnected lines forming a network-like structure.

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# Selling the Value of PPM

Your Guides: Wes McCoubrie and Jen Scarlato

# Agenda

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- Introduction
- 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.**



# Part II: Defining Value

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# How Do We Define Value?

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

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



# Leveraging Executive Stakeholders

# Identifying the “Right” Stakeholders

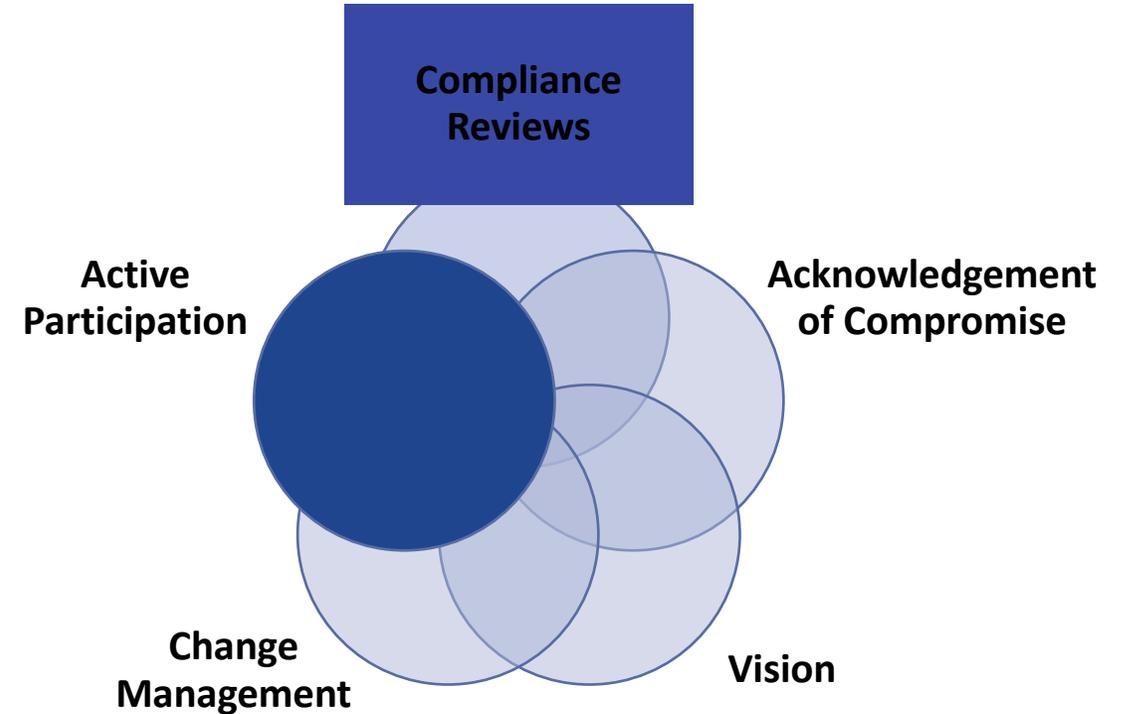
- Personality
  - Stakeholders or sponsors can't be forced into the role. If they are, those aren't your champions.
  - Belief in the value of CA PPM is fundamental.
  - Be both optimistic and pragmatic.
- Influence
  - Are they Maven, Connector, or Salesperson?
  - Direct impact on day-to-day users, performance reviews.

# Making the Argument

- Even if you identify the right stakeholders, they often need to be further convinced.
- Present key outputs and decision support capabilities specific to their role, followed by the lower-level prerequisites.
  - Example: Portfolio waterlines require accurate project forecasts.
  - Example: Capacity risk management requires updated allocations.
- Be specific with the activities required to achieve good adoption and data quality.

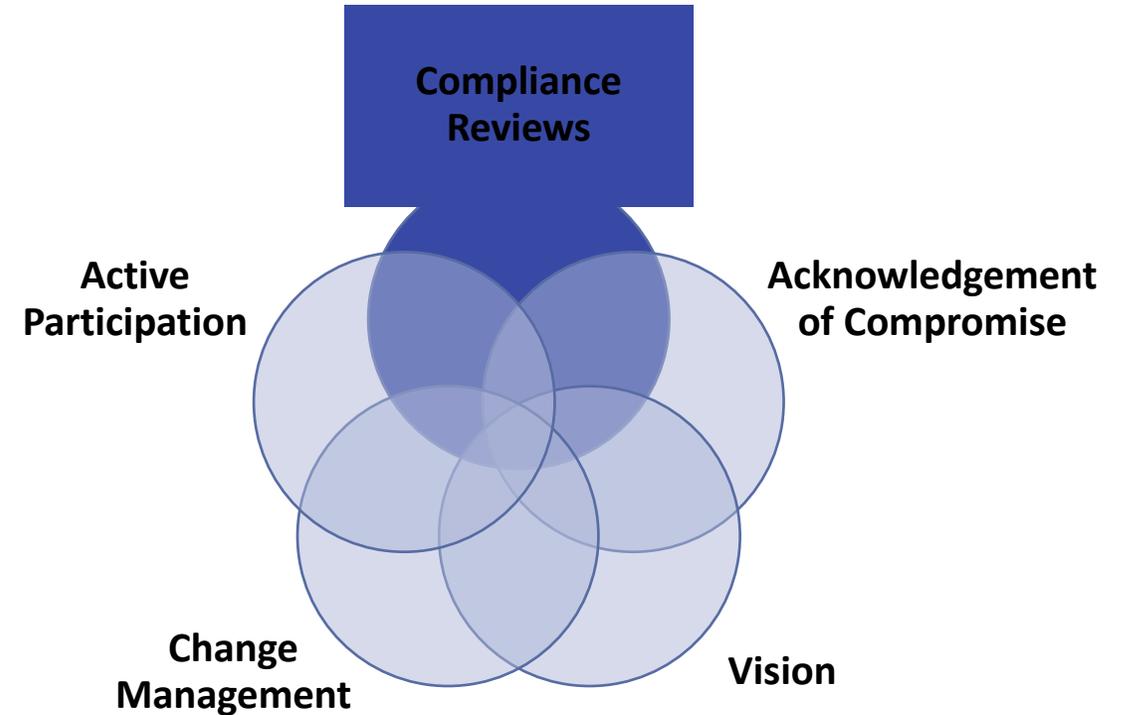
# Leveraging Stakeholders

- Be a visible and participant in the process.
- Attendance at PM, RM, PMO Forums.
- Included on distribution lists.



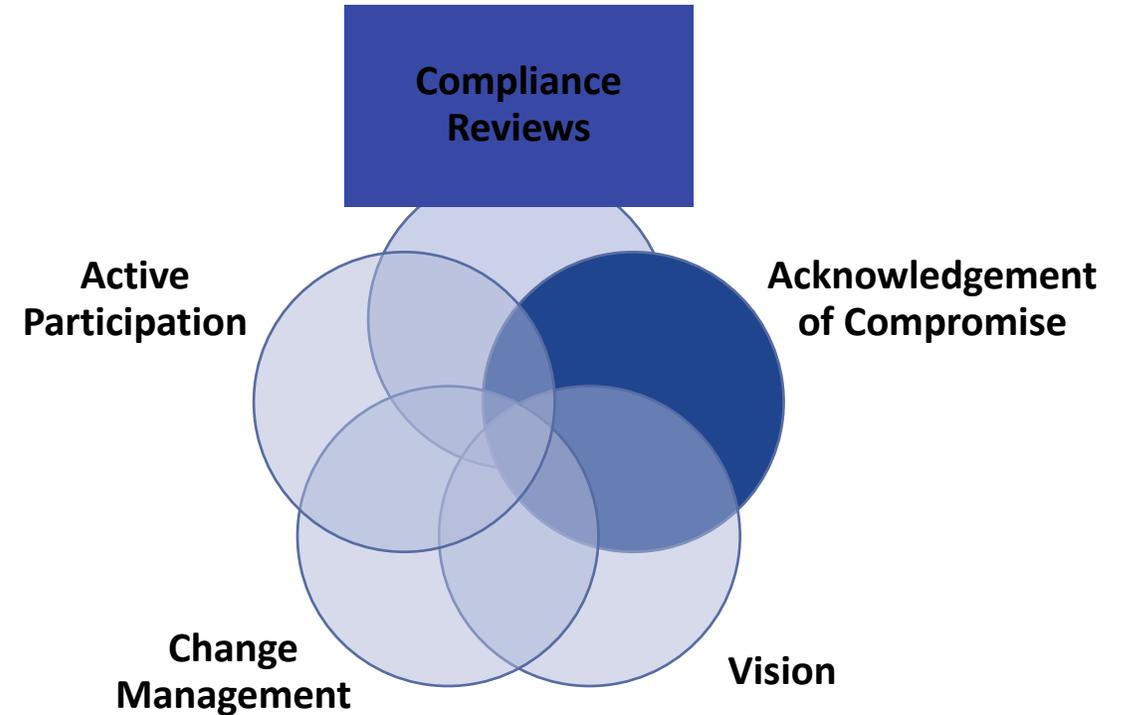
# Leveraging Stakeholders

- 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.



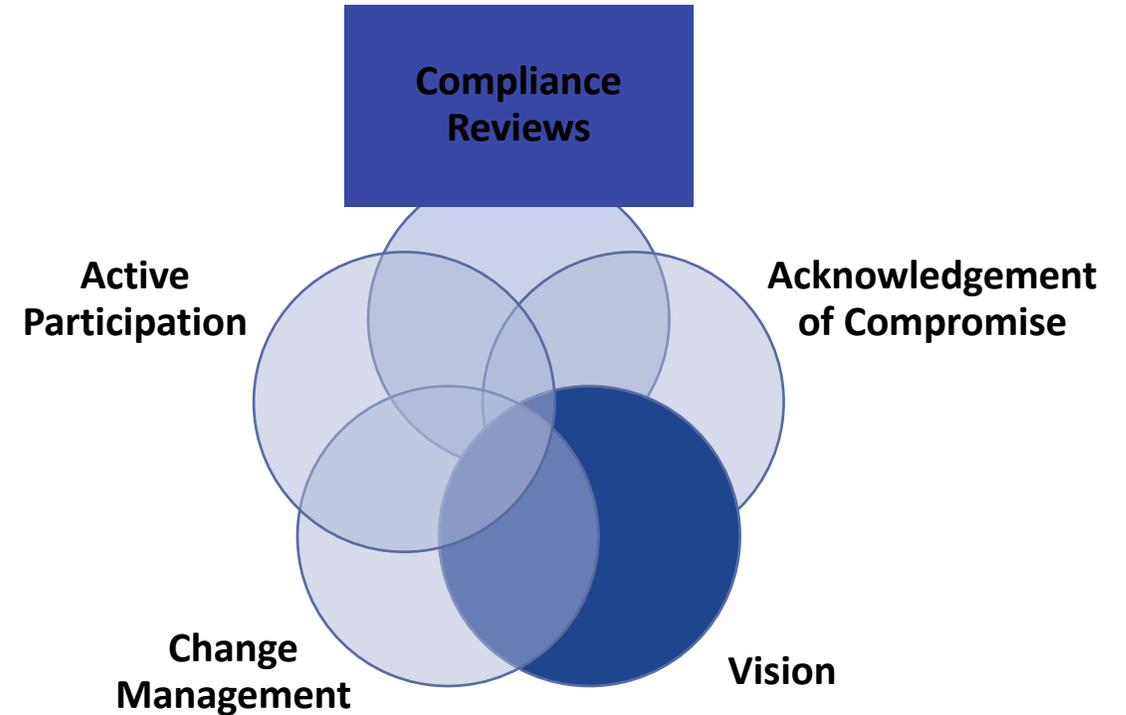
# Leveraging Stakeholders

- 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.



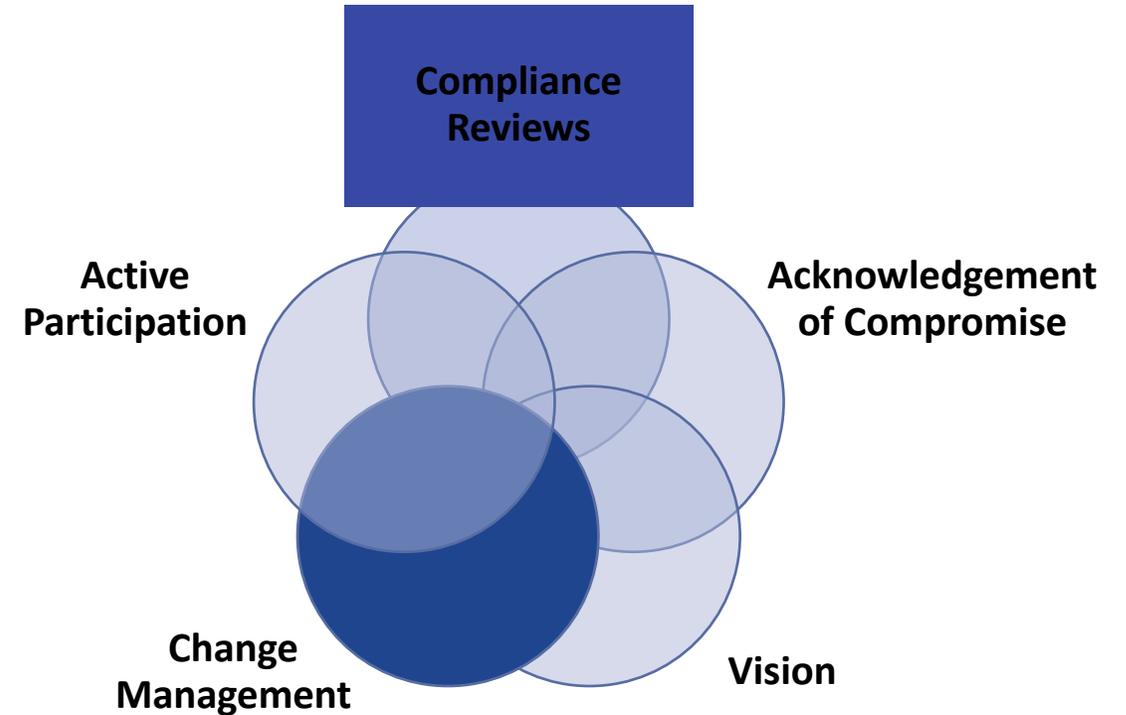
# Leveraging Stakeholders

- 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.



# Leveraging Stakeholders

- Empower stakeholders to be change agents.
- Take ownership of specific enhancements.
- Deliver release notes.
- Attend kick-off sessions for training.



# Questions?



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