

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 coniferous trees. The middle ground shows rolling green hills and a dense forest. In the distance, 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.

*rego*University 2018

Selling the Value of PPM

Your Guides: Wes McCoubrie and Jen Scarlato

Agenda

- 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

*rego*University **2018**

Let Rego be your guide.

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

*rego*University **2018**

Let Rego be your guide.

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

*rego*University **2018**

Let Rego be your guide.

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

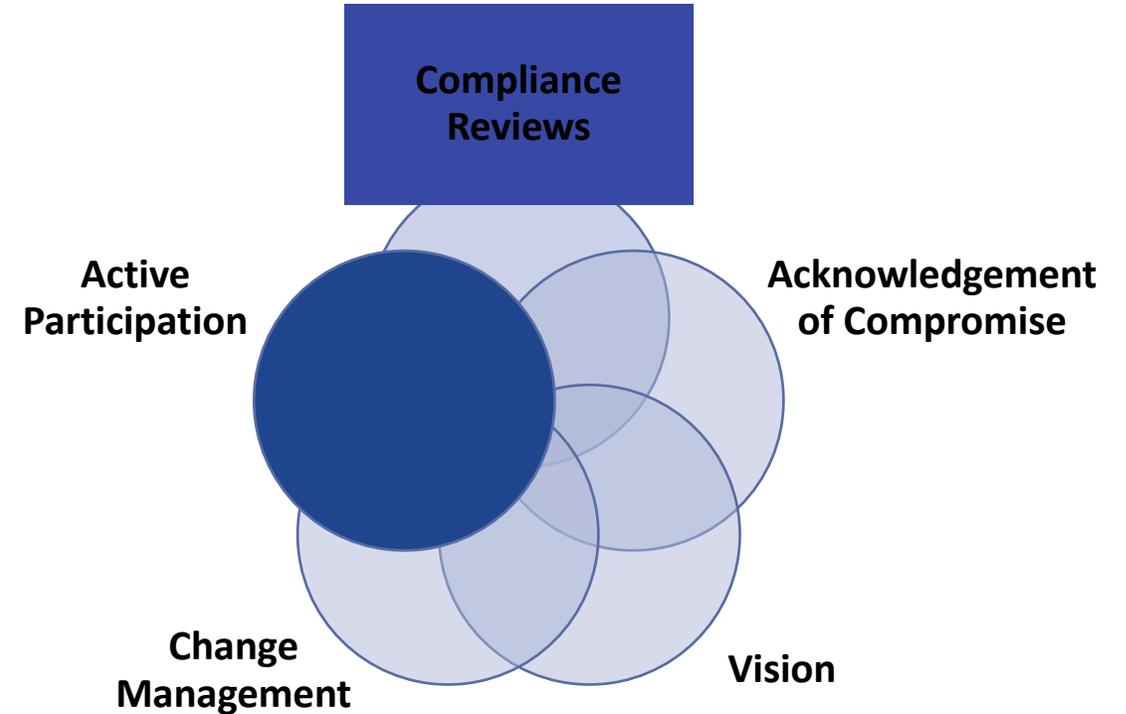
- Are they Maven, Connector, or Salesperson?
- Direct impact on day-to-day users, performance reviews.

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.

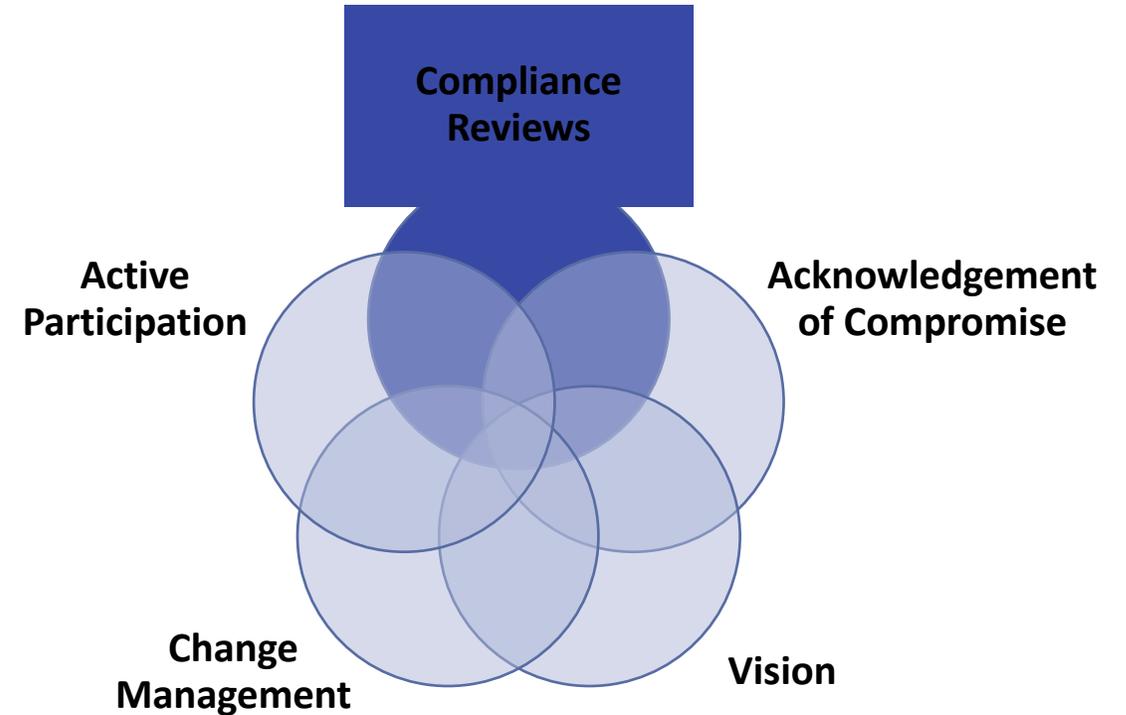
Leveraging Stakeholders

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



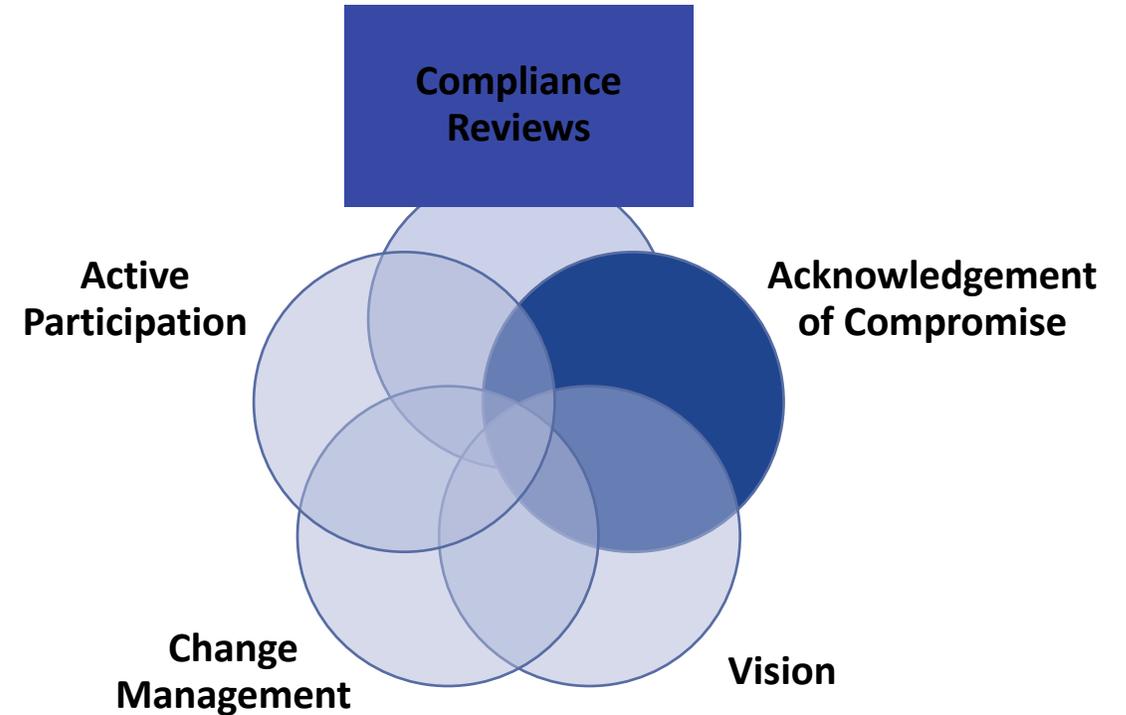
Leveraging Stakeholders

- Develop targeted compliance reports with a broad distribution list.
- Make report review a key stakeholder responsibility.
- Don't just schedule a report, get 5 minutes on a weekly / monthly agenda to discuss trends.



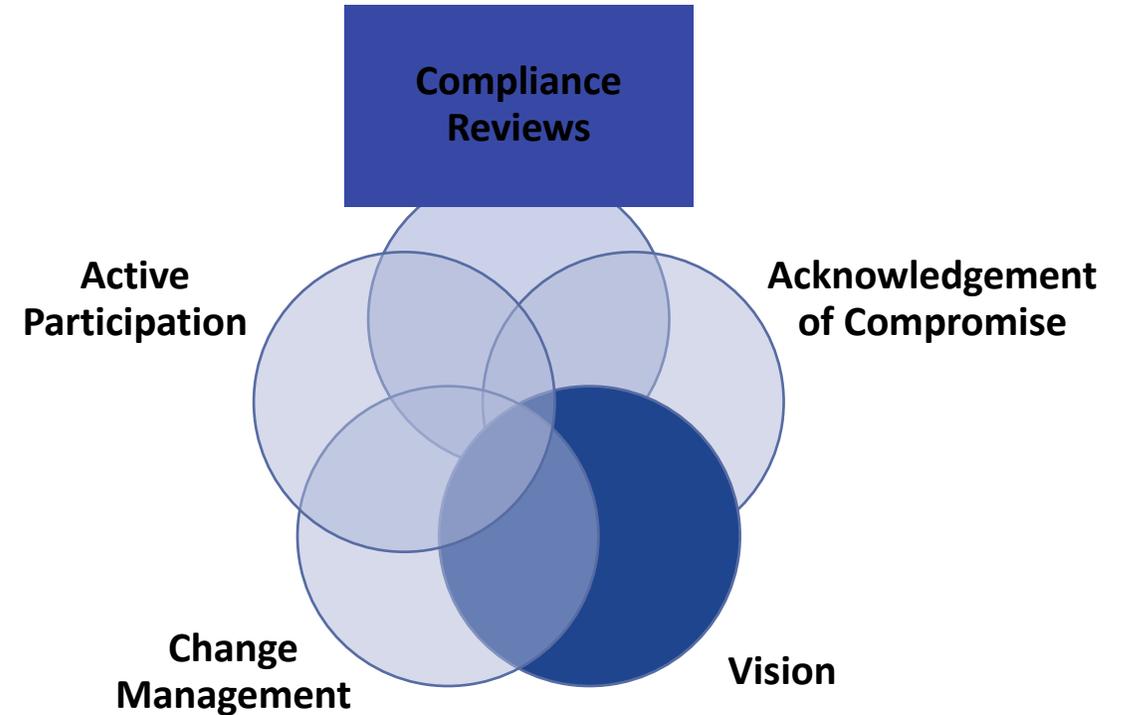
Leveraging Stakeholders

- 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.



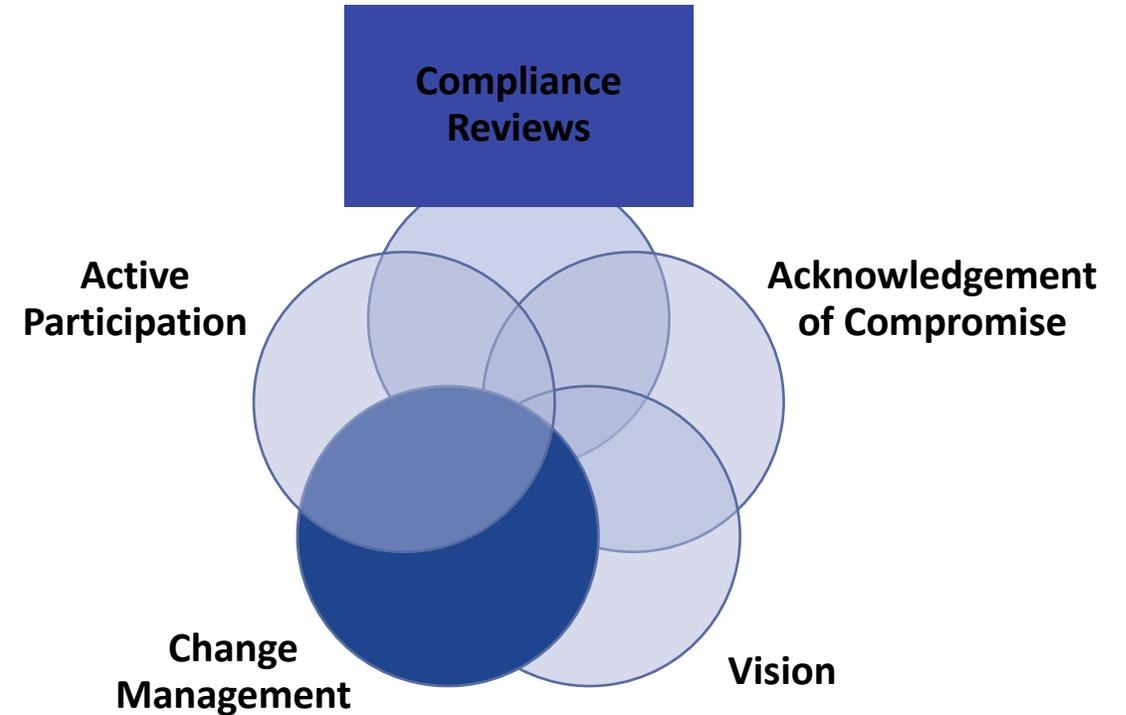
Leveraging Stakeholders

- 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?



*rego*University 2018

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

888.813.0444



Email

info@regouniversity.com



Website

www.regouniversity.com