



Program & Portfolio Management  
Symposium Community

# Trip Report

## Program & Portfolio Management Symposium Community

### Key Takeaways

This year's Gartner Symposium centered around the six imperatives for driving business success through IT:

1. Attract & retain customers
2. Build and innovative and agile organization
3. Improve critical business processes & workflows
4. Improve workforce effectiveness
5. Manage risk, compliance & enterprise governance
6. Maximize performance, profitability and competitiveness

Amid these themes, the 497 attendees who joined the PPM Community were clearly concerned with the nitty-gritty issue of prioritizing the flood of projects and programs that all seem to be top priority to their business peers.

In addition to the traditional focus of project management (doing things right), PPM leaders are increasingly responsible for enabling the organization to "do the right things" with their IT investment dollars. Prioritizing projects and programs has long been and still remains the leading struggle for PPM leaders, and it was clearly evident in the roundtable discussions, workshops and presentations at this conference. While the prioritization challenge is not unique to PPM leaders, the task of helping the organization weigh the competing requests for limited IT resources always involves PPM leadership. Determining the optimal combination of projects and programs involves making difficult trade-offs and politically unpopular decisions in a transparent and (hopefully) defensible manner.

Issues of particular concern this year included:

- Getting stakeholders to take ownership of projects requested and determining just what "ownership" means.
- Developing metrics to measure the success of projects or process improvements.
- Dealing with stove-piped organizations with half a dozen different departments, or geographies, each with a different agenda and requests for projects or processes that are either duplicate or conflicting.
- How to handle communications and steering of projects and programs to manage expectations about project size, scope, cost and impact.
- How to deal with top-down budget setting.

### Conference Highlights

#### "PPM Processes: Keep the People In and the Complexity Out" by Audrey Apfel

There are countless ways the Program and Portfolio Management process can be configured, though the common, underlying driver is the same: optimize business investments by defining, selecting and executing them carefully. In this presentation, Ms. Apfel detailed the main activities facing PPM managers, the main process steps of each activity, and how to tell whether you are set up to succeed or fail at each point.

Recommendations:

- **Immediately:** Conduct a "clear expectations" review with business stakeholders about the charter, goals, metrics and roles.
- **Near future:** Established a "Key Process Evolution"
  - Get agreement on criteria and process for beginning, middle and end of project-based activities with business stakeholders
  - Add basic change management planning to project planning and execution
- **Long-term:**
  - Determine roles, skills and career path focused on the discipline of PPM
  - Hang your shingle outside of the IT organization.

## “The Methodologies of PPM: Not Keeping Up With Business Needs” by Audrey Apfel and Matthew Hotle

Project management as a discipline and emerging profession seeks to optimize consistency and repeatability around the artificial construct known as the “project.” In this presentation, Audrey and Matt describe how this design will come under increasing pressure from two sides — the business who is looking to IT to provide speed, flexibility and agility, and from the technology base itself that can increasingly, provide it. If we continue to need long-term planning, formal governance meetings to enable decisions, and long project cycles, results will be sub-optimal, if not disastrous. The industry that is built of cookbook certifications, increasingly granular software tools, and self-promulgating complexity is leading us in the wrong direction. The advice presented in this presentation suggests that project cycles need to be shortened, activities should be optimized around ongoing operations of the living process, and decisions need to be passed down in the organization (closer to the source that will act on them).

Recommendations:

- **Immediately:** Determine what the business needs you to be right now and adjust operating principles accordingly.
- **Near future:** Plan for staff succession and transitions in and out.
- **Long-term:** Adjust project processes to optimize business trade-offs and flexibility, not just process consistency.

## “The PMO: Overhead Expense or Essential Change Agent?” by Donna Fitzgerald

Though the PMO construct has been around for several years, the matter of how to make it effective remains a significant factor in determining its long-term success. In this presentation, Ms. Fitzgerald focused first on the people — describing the key competencies each needs to have — and second on a list of the “seven deadly sins” of the PMO. They are:

1. Too many projects in the pipeline and not enough people to do them.
2. Refusal to deal with troubled projects.
3. Too many intertwined projects being managed independently.
4. Too many small projects clogging up the pipeline.
5. The business strategy become secondary to the technical goals.
6. Nobody is sure that the business wants, but they'll build it anyway.
7. Expecting software alone to solve the problem.

## “Business and IT Governance: Proven Practices in Stakeholder Engagement” by Tina Nunno

Engaging stakeholders' time and attention in supporting IT projects and governance is a delicate balance. Under-engagement of stakeholders risks failing to meet user needs; over-engagement can result in bogged down schedules and missed deadlines, and inappropriate engagement can leave everyone dissatisfied. Appropriate engagement involves balancing a number of factors such as size of the initiative, scale, risk and complexity. A constructive relationship between IT organizations and business executives often involves significant change management. In her presentation, Ms. Nunno emphasized that business outcomes define the success or failure of an engagement.

Recommendations:

- Develop a meaningful understanding of the priorities and constraints of your key stakeholders
- Define engagement for key stakeholders on each initiative so that they understand their commitments.
- Anticipate conflict among stakeholders, and use governance and engagement tools to resolve them.
- Create an impact calendar to ensure you aren't overtaxing stakeholders and increasing IT risks.
- Engage stakeholders in decisions and subjects appropriate for their level and areas of interest.

## Roundtable: "The Pain of Project Prioritization" conducted by Audrey Apfel

In this roundtable, attendees and Gartner analysts shared ideas and opinions about political, cultural and other issues that get in the way of prioritizing projects. Experiences about what worked, what failed and what was just too painful to be practical provided some real-world advice for attendees who have faced or are facing similar circumstances. While the attendees were at different levels of maturity and success with their prioritization initiatives, there were some shared perspectives. For example, those that had achieved real business ownership of this process felt a weight lifted off of the shoulders of the IT organization, despite some perceived loss of control at the beginning. Second, there needs to be a lot of coaching and support as this process gets implemented. One attendees organization had a “right foot” group to ensure that business value, resources, planning and the rest were set up correctly — so the project could get off on the “right foot.”

## Roundtable: “The Transition from Projects to Programs” conducted by Donna Fitzgerald

“Program management” has become a very hot term, often used to try to address perceived shortcomings in a project management process. We generally view a distinct role for programs and program management — to move beyond execution and delivery issues and enable a discipline that focuses on holistic multi-project delivery of business outcomes. The words are a little vague in the previous sentence — and this was intentional. The attendees of this roundtable had no consensus on how a program actually manifests itself in an organization, or how to manage it. This mirrors an active research debate the Gartner PPM analyst team is having at the moment. However, we will be rolling out our “Hitchhiker’s Guide to Program Management” and associated tools in our “Gartner for IT Leaders — Program and Portfolio Management” offering, so we’re on it! Stay tuned!

### PPM Community Capstone

Members of the PPM community chose a mascot. The choice was overwhelmingly for the mythological character Sisyphus. For those of you who are unfamiliar with our friend Sisyphus, he was punished by the gods for all eternity by having to roll a huge rock up a steep hill, but before he reached the top of the hill, it rolled back to the bottom, and he had to start over. Appropriate I guess, for those days we are frustrated with how slow change is.

Community members also provided feedback on how the Community program at Symposium can be enhanced in the future. This information will be communicated to our Events group, who are actively working on our Spring Symposia already.

### What People Asked About

The hot PPM topics during this conference were closely inter-related: prioritization, metrics and value, and roles and skills.

As in the previous several years, the issue of how PPM leaders should to prioritize projects when demand far outstrips resources remains pre-eminent. We asked attendees at a workshop held during the conference to pick a key challenge to working. The 20 workshop attendees were divided into three sub-groups and asked to pick a key challenge to work on. All three tables chose prioritization.

Another continuing concern among attendees was that the PPM leader usually has no direct control. Most PPM leaders are not in a position to mandate changes, so they must segue and finesse their agenda. However, PPM people are smart, creative people put in these positions because of their ability to influence direction and execute change. Best advice: Be timely, transparent and learn to use the language of the stakeholder

Gartner analysts were quick to remind us that it takes multiple years to embed a PPM process into an organization in a lasting way. At present PPM is in an iterative “start up” mode. Having the right people (including executive sponsor) in the right roles is more important than having the best practice or template

Typical of the PPM Leader role, there are many battles that can be fought, the key is picking the right one. This means the one the business recognizes as a point of pain, will support actions taken to improve it, and will reward the players involved if the change is successful. Always look across the landscape for the quick wins and credibility-building opportunities.

### Things to Watch For

During the coming year, Gartner presenters stressed, there are a couple of key points to keep in the front of your mind:

- Project management is mechanical, program management is emotional and portfolio management is political. Do you have the right people in the right roles? Have you set them up to succeed?
- Is there an enterprise view of value (expressed through a common set of scoring or evaluation criteria) for project proposals or business cases that will allow you to help the organization combine the top 10 project lists from multiple business units into one list for IT/enterprise priorities?
- Do you have a plan on how to become more agile and flexible in your PPM processes? Can you envision starting and stopping project units on a frequent basis.

## ITxpo Sponsors for the Program & Portfolio Management Symposium Community



AT&T  
Autonomy  
CA  
Cisco  
Dell  
Fast  
HP  
IBM  
Intel  
LANDesk  
Microsoft  
NEC  
Novell  
Romania IT  
Sterling Commerce  
Symantec  
Endeca  
Vanco  
Verizon Business

### Program & Portfolio Management Marketplace

Primavera  
Sciforma Corp.