

# CRITICAL PROGRAM ROLLOUT

Design a Governance System to help leaders track and report a key program

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## THE SITUATION

Our client, an (ASX Top 20) financial services organisation had already allocated ~\$2bn to invest in shaping its near term future. The portfolio consisted of 13 interdependent programs designed to deliver significant efficiencies and capability across the organisation. With the baseline for each program approved in early 2010 (scope, deliverables, costs, benefits & timeframe), all programs were underway and some capabilities had been delivered.

## THE APPROACH

Because the scale and complexity of the program necessitated leadership at a portfolio level, there were some concerns within the Senior Management Team that without an alignment of accountabilities at this level, the program could falter. [toughproblem] were engaged to design a system that would help the organisation track and report at a project, program and portfolio level. The brief included the following design criteria:

- Reduce complexity, increase consistency and improve transparency to facilitate better decision making
- Develop a process for managing, monitoring and assessing a portfolio of investments to ensure delivery of intended benefits and capabilities that will deliver value for the organisation
- Leverage existing frameworks and tools wherever possible

## THE DESIGN

We worked with our client through a series of workshops to identify the core requirements of a system that would help them manage the rollout of this large corporate program. The solution was to design and build a robust 'Governance System' that would not only help them with the current program but would also benefit the organisation when managing future programs. The 'architecture' of the Governance System included the following components:

- Institute an "Accountable-Style Conversation" to foster the right type of discussions at Steering Committee meetings
- Design protocols to facilitate the roll-out of a "single source of truth" tracking system
- Design standard formats for portfolio, program and project reporting
- Design processes to track and measure the realisation of benefits and capabilities of projects, programs and the portfolio