



# ***Sequential steps to design and deliver your transformation programme: Webinar Q&As***

## **ANSWERS TO QUESTIONS ASKED AT THE 16 APRIL 2024 TRANSFORMATION WEBINAR**

### **In terms of getting buy in, in your experience what is more important, the vision of where the business ends up, or the ROI of the project?**

The vision will always be the most important aspect. You will need to be able to clearly and concisely articulate the vision because that will be what drives all following activities. The vision is your top-level strapline so everybody can know what you're trying to achieve, how it will benefit the organisation, and why you're looking for the investment required. The ROI is another level down from the vision - you will need to know the benefits which flow from the end state in order to calculate ROI (along with programme costs). The vision will also be what helps you capture hearts and minds of people outside of finance.

### **How do you prioritise workload on cross-functional projects when it may sit with different priority levels in each team?**

Identify critical path items - those which will significantly delay or derail the programme if not achieved. These must be prioritised, either by deprioritising other tasks, or finding additional resource support. Identify any external dependencies which you cannot control e.g. systems going out of support, legislative changes etc- any of these that have a cost, reputation, compliance or other significant impact on the business should be prioritised. Use a prioritisation methodology e.g. Eisenhower matrix to work out is urgent and important, then prioritise those activities.

### **What are the best ways/approaches to convince/obtain buy-in from non-finance functions to engage in a finance/accounting-led transformation project?**

Be clear on the benefits it will give them. Create your sales pitch - they won't want to hear about functionality, or systems performance, but they will want to know that they can get real-time performance reports from a self-service portal making it easy to make business critical decisions in real time, or that 99% of customers will be paid on time improving their working capital, or that all employee expenses can be submitted and processed via a digital app reducing effort to submit and time to receive payment (for example).

### **What is your experience of agile compared with waterfall project methodology in the framework of what is primarily a waterfall framework?**

To be truly Agile (formally), organisations need to make a cultural change, and have the Agile support in place. It can be really hard for finance people to let go of their desire for detailed plans, forecasts, etc. The key is to show the benefits of adopting an agile approach and what that means in practice, i.e. plans are living documents that evolve as we uncover more information; we can fail

fast, take onboard learnings, and move on; focussing on delivering early benefits rather than trying to plan something for delivery in 2 years time based on today's information. If your organisation adopts a formal waterfall methodology, you can still adopt agile ways of working - collaboration, MVPs, gathering feedback, etc.

**All organisations are a function of multiple systems, trying to change all of that could be overwhelming maybe to the point where you never strike ground because of the need to capture everything. Is it common for these methods to be used to deliver transformation in specific systems on a serial basis? SMEs are invariably challenging to create change and get stakeholder buy in.**

Transformation by its very definition is not a series of small incremental changes. Transformation fundamentally disrupts organisational paradigms, business models, cultures, strategies. If you set out to make small incremental changes, you will never get to a transformational end game. To drive organisation wide transformation across systems and business architecture will need the organisation to have a top-down approach. Setting the IT or architecture strategy upfront will allow all transformation activities to align for example, moving to cloud-based solutions, being aligned to a specific software vendor and leveraging synergies between modules/solutions. It goes back to the Vision - if you can clearly articulate the vision, and the benefits it will bring, then it makes it much easier to set strategies and direction that will deliver the vision.

**What are your thoughts/comments on the Post Office Horizon project management?**

The Post Office Horizon scandal has had a devastating effect on the lives of so many people. It has been described as one of the greatest miscarriages of justice in British history. It would be inappropriate to comment in too much detail while the inquiry is ongoing, but obviously it's good that the inquiry is taking place. When projects fail, it is important to understand what went wrong so that future recurrences can be avoided. As such, we hope the findings of that inquiry help ensure people never experience this type of impact again. One observation I would make is that there needs to be a culture of psychological safety in projects, where individuals are not penalised for calling out issues and speaking the truth. Without this, we risk encouraging unwanted practices such as watermelon reporting and strategic misrepresentation.

**What would you recommend to Boeing with regard to transforming their safety program.**

It is paramount that safety comes first for every person who flies on, operates, designs, builds or works on any aircraft made by Boeing, or any other manufacturer. People need to have confidence in the products or services they are using. As such, the projects that give rise to these products and services must place as much emphasis on safety, quality and compliance as they do on time and cost, if not more. Commitment to safety must be upheld at the highest levels of any company. The changes at senior leadership level that Boeing has announced create an opportunity for a strategic transformation. Project management will be the key to making such a transformation a success, because organisations that position project management as the vehicle for strategy execution are best placed to achieve their vision.

**Re importance of appropriate Transformation Governance, any tips on approach in making this as effective as possible in an agile environment?**

Fundamentally, the governance framework needs to ensure that projects are aligned to the organisation's strategy/goals, regardless of the delivery approach. As with all governance, having clear accountabilities set out as part of the framework is key. Agile is all about empowering the project delivery teams, so it needs to be clear what responsibilities/accountabilities they have and where the touch points are with the wider project governance structure. A difference with

governance in an agile environment compared to a more 'waterfall' delivery approach is that the focus should be less on project documentation and delivery against the plan and more on effectiveness of team working practices, delivery of working outputs and adapting to change. A clear understanding of what agile is and the benefit a project will get from the approach is critical. For further information visit [A guide to assurance of agile delivery](#) or [Directing agile change](#).

### **What project management tools or platforms do you recommend?**

Internally at APM, we use Asana to help us plan and deliver many of our internal projects, as well as Miro to help us map out ideas. The great thing is that so many project management tools have emerged in recent years, which I believe is a reflection of the fact that so many organisations acknowledge they have to approach projects in a more methodical manner. These all have their strengths and specialisms. There's no single 'right' project management platform – only one that's right for the user. There's lots of good information available online if you're in the market for a new tool or platform. My main advice is to involve as many stakeholders as you can in the decision-making process to ensure it meets their needs.

### **Please could you expand on what programme vs project control managers are and what skills should they have?**

Project control managers have a key role in ensuring the project delivers on time, to budget and quality requirements, whilst managing risk and controlling change - which they achieve through planning, analysing and reporting on project performance, problem solving as they go. The focus is on ensuring delivery of a set of agreed outputs. Skills required for the role include, understanding of project management, planning and scheduling, analytical skills, risk management, budgeting, communications, problem solving with a good eye for detail.

Programme control managers control a set of related projects that together deliver overarching outcomes/benefits. Along with ensuring delivery to time/budget/quality and within scope at the programme level. They have a focus on controlling the dependencies between projects, co-ordinating activities across the projects to maximise efficiencies, managing programme-level risks and ensuring resources are allocated effectively across the programme, redeploying where necessary. They also ensure ongoing alignment of the programme with the organisation's strategy. The role requires the same skills as project control manager but there is a need for wider leadership, strategic thinking, resource capacity planning and management, understanding of programme management approaches, understanding of governance, and dependency management.

### **How would you tie in / weave Kotter's change model to this model? A lot of Kotter is apparent in the conversation but not the slides?**

These eight steps need to be incorporated into:

- the ACTION PLANNING part of the 4 sequential steps of change – to ensure key activities are planned as milestones, **and**
- the ongoing PROJECT MANAGEMENT change management foundations – the eight steps are a very insightful useful checklist.

<https://www.kotterinc.com/methodology/8-steps/>