# The Project Sponsor's Toolkit:

## Defining and refining the sponsor role - how to steer projects effectively, evaluate progress, and empower teams.

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Project & Portfolio Management Award

# We need to achieve our strategic objectives…

# …we need to deliver projects successfully

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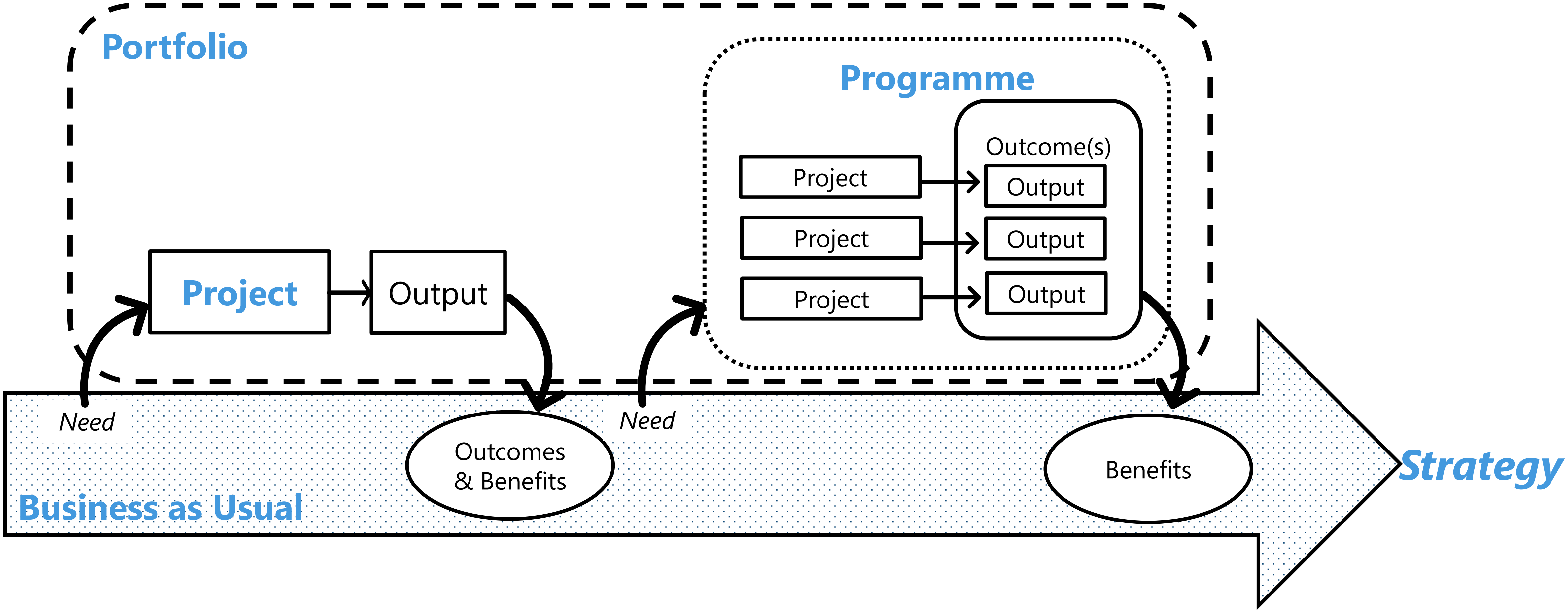
# BAU, Project, Programme and Portfolio

Projects, programmes and portfolios are introduced in order to enhance performance, bring about change and enable organisations to adapt, improve and grow

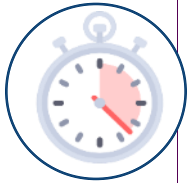
APMBOK 7th ed p3



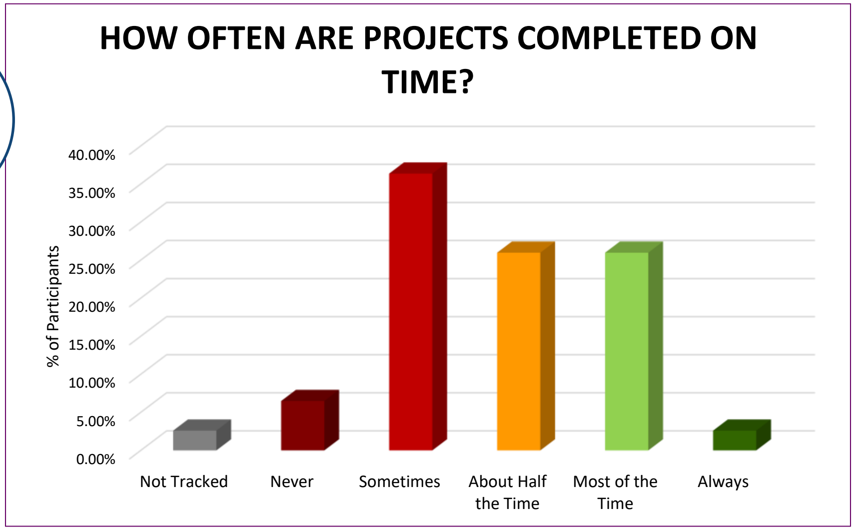
# Typical Project Management Challenges

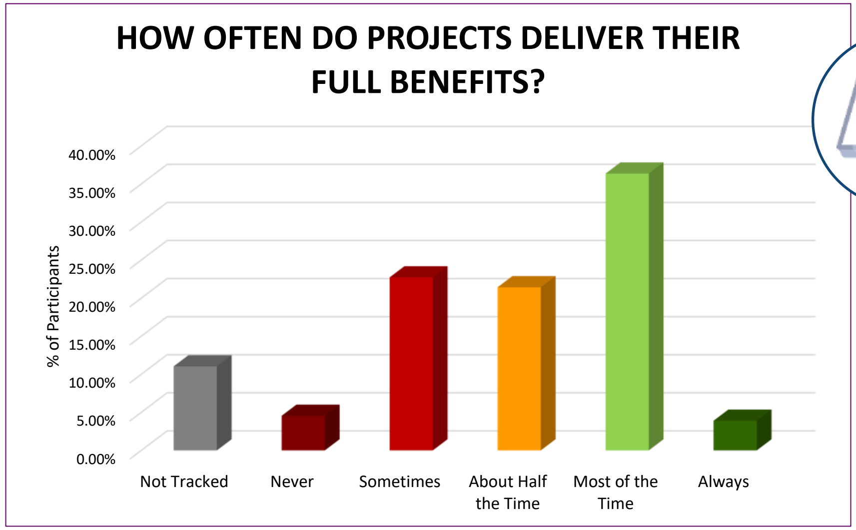
- Projects not prioritised
- Projects happen without authorisation
- No definitive list of projects
- Inconsistency in approach
- Lack of visibility of project status
- Scope creep or lack of scope definition
- Poor planning & estimating
- Limited risk management
- Poor change control
- Poor resource management
- Limited control of budgets
- Project benefits not managed or realised
- Time consuming manual reporting
- 'Manipulated' RAG KPIs

# Project Success Rates

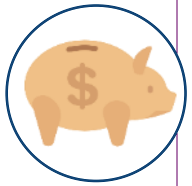


**29%** of projects are mostly or always completed on time

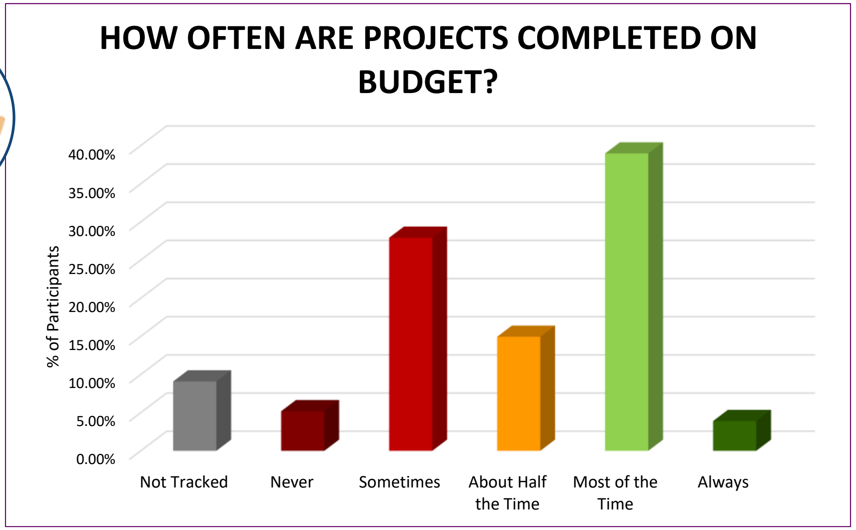



**40%** of projects mostly or always deliver their full benefits



**43%** of projects are mostly or always completed on budget





**47%** say their organisation has a track record of project success

# Two Sides of Success

| Business Success | | Project Success |
|---|---|---|
| The project delivers an output that enables planned benefits to be realised | + | The project is delivered within (the agreed) acceptable constraints |

*The Sponsor must be concerned with achieving business success and achieve the desired benefits.*
*However, this cannot be achieved at an unacceptable cost or impact to the organisation or any of its activities – this is why there has to be specific constraints (criteria) attached to any one project.*

# Five Level Maturity Model

**Level 1**

**Initial**
Ad-hoc processes.

**Level 2**

**Defined**
Basic process established for larger projects.

**Level 3**

**Repeatable**
Standard processes for all projects.

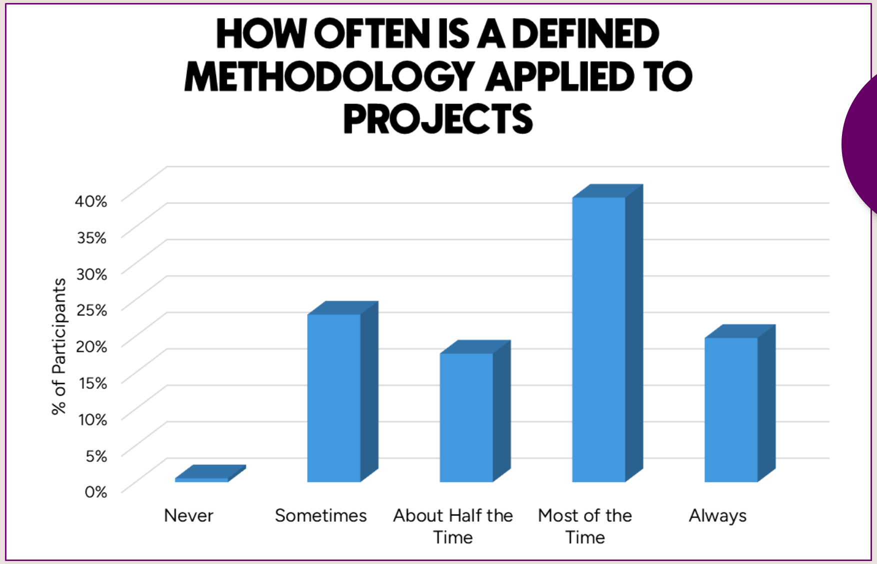
**Level 4**

**Managed**
Process integrated into wider corporate entity. Compliance is mandatory.

**Level 5**

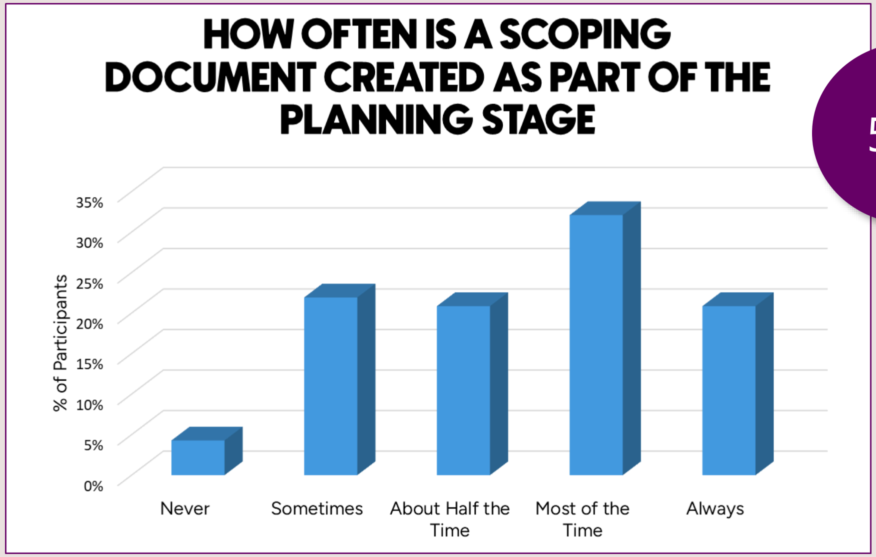
**Optimised**
Process established for continuous improvement.

# Maturity Characteristics



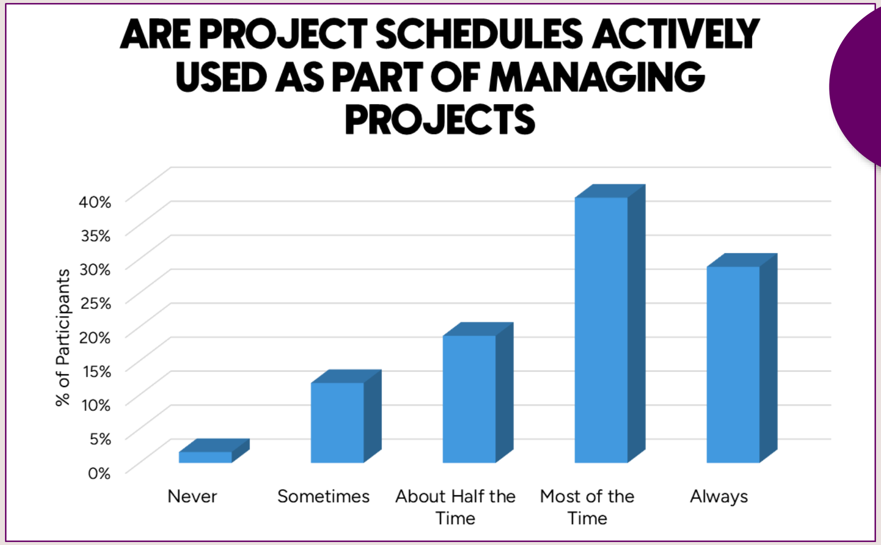

59%

Mostly or always apply a defined project methodology



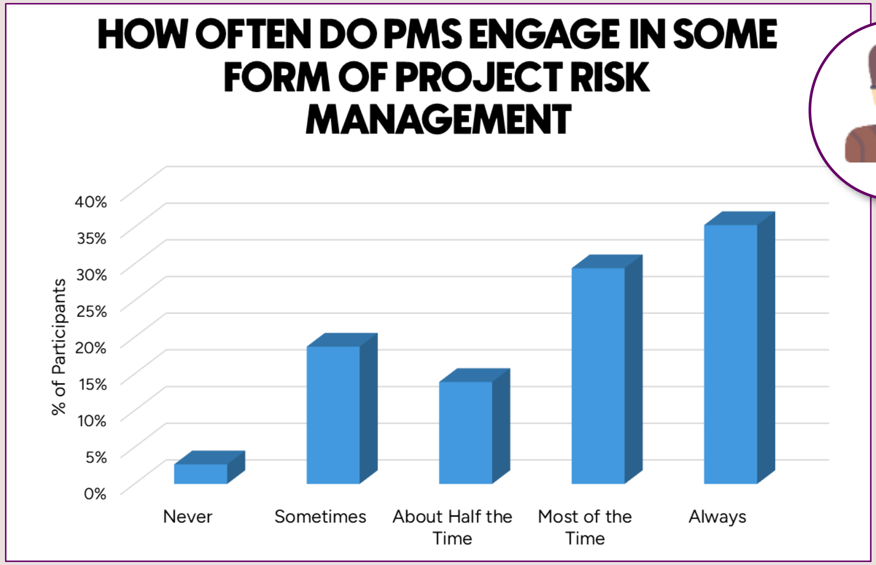

53%

Mostly or always create a scoping document as part of planning




68%

Mostly or always actively use a project schedule




**65%** of Project Managers always or mostly engage in risk management

# Key Drivers to Project Management Maturity

### 01: DELIVERY FRAMEWORK

Define consistent, practical, fit for purpose PPM methodology, lifecycle & governance structures based on best practice, but tailored to the organisation.

### 02: PMO

Develop PMO capability to support best practice Project, Programme, and Portfolio Management. Benchmark, establish a PPM Maturity Roadmap, and ensure PMO value.

### 03: TECHNOLOGY

Leverage enterprise PPM solution to enable consistency in approach, one version of the truth, transparency & collaboration.

### 04: TRAINING & SUPPORT

Establish training in Delivery Framework & practical PPM tools & techniques. Establish a PPM Community of practitioners, mentoring and career development

# Many drivers for project success…

# …let’s focus on a critical one

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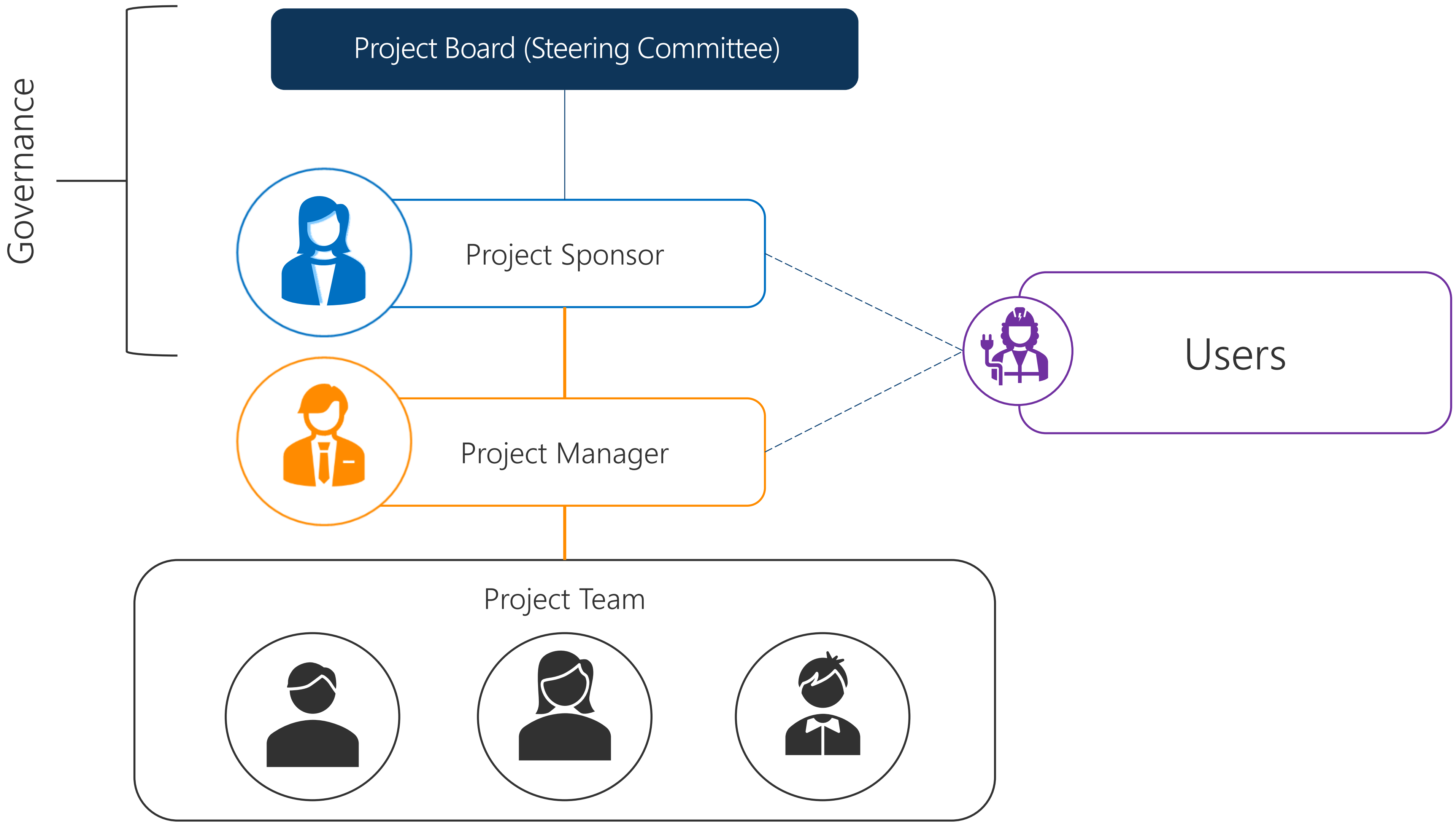
The effectiveness of the project sponsor is the best single predictor of project success or failure

*National Audit Office*

# Project Governance

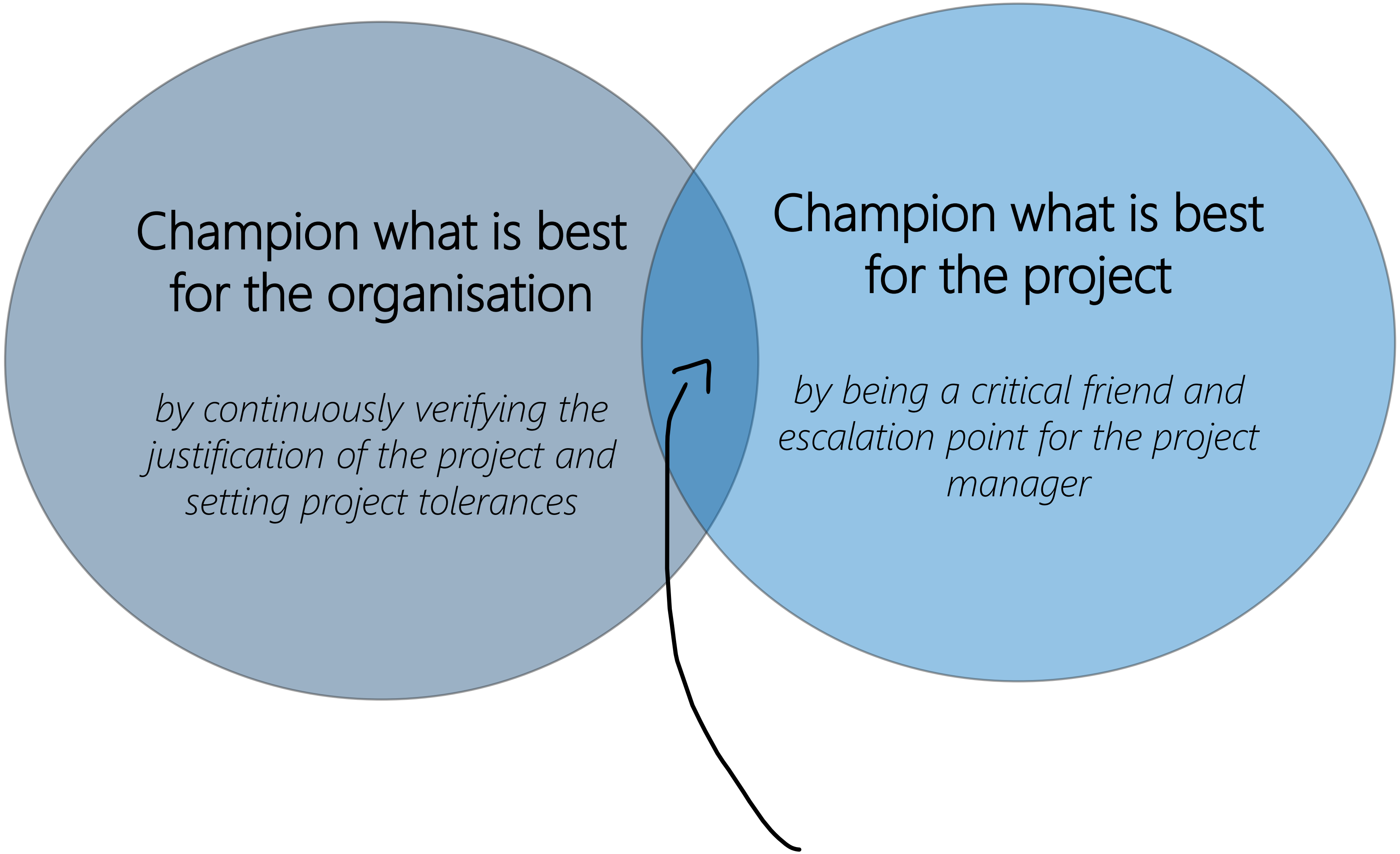


# The Importance of the Sponsor

" Sponsors have a misunderstood role; they can create or destroy value for a business. They directly link the corporate direction of the business and project objectives. They determine the value of any business proposal translating these through projects into business-as-usual activities. Being an advocate for the project, they importantly communicate with stakeholders communities with their ever-increasing demands and are accountable for the business benefits delivered through projects. They are the "oil in the business gearbox" "

*Foreword. Sponsoring Change, Second Edition. The Association for Project Management*

# The Sponsorship Sweet Spot




the Sponsorship “sweet spot”

# Sponsor Functions for the Organisation

The Sponsor champions what is best for the organisation by:

- Ensuring projects are linked to (and drive) strategy
- Being accountable for benefits and their realisation
- Owning the vision and business case
- Reflecting corporate risk appetite to ensure projects do not damage the organisation or its interests
- Collaborating with other projects to ensure strategic aims can be achieved
- Applying corporate governance

# Sponsor Functions for the Project Manager

- Providing leadership
- Owning requirements & Clarifying priorities
- Championing the project
- Providing resources
- Receiving reporting
- Escalating issues and approving changes
- Providing authorisation
- Managing relationships

# Practical Sponsor Activities through the Lifecycle

LIVE PROJECT

## Initiation

- ✓ Create business case.
- ✓ Is this proposed project attractive AND achievable?
- ✓ Does this proposed project align with strategy?
- ✓ Priority compared to other projects?

## Planning

- ✓ Provide clear direction on scope.
- ✓ Support creation of schedule, cost & resource plans.
- ✓ Ensure risk assessment.
- ✓ Ensure stakeholder mapping & comms plan
- ✓ Scrutinise and approve plans.

## Delivery

- ✓ Point of escalation.
- ✓ Receive regular reports (RAG KPIs) & take action where needed.
- ✓ Approve changes.
- ✓ Escalate further where needed.

## Handover & Close

- ✓ Approve project closure.
- ✓ Ensure successful handover from the project team.
- ✓ Contribute to lessons learned

## Benefits realisation

- ✓ Champion project outputs to deliver benefits.
- ✓ Track benefits.

ENGAGE STAEHOLDERS & CHAMPION PROJECT

# So, What Does the Sponsor Do?

- ✓ Champion the project.. and drive to achieving the benefits
- ✓ Clarify scope and TCQ (the constraints)
- ✓ Point of escalation for the project team
- ✓ Retain oversight… am I confident I'll get benefits within constrains?

  - Scope
  - Schedule
  - Costs
  - Resources
  - Risks
  - Issues
  - Changes
  - Stakeholders

# Project Health Check

**Think of a project you Sponsor, or are involved in...**

- ❑ Who is the PM, who is the Sponsor?
- ❑ Is the scope clearly defined, where?
- ❑ Has the expected benefits been clearly defined, where?
- ❑ Is there a schedule, a list of task, that is being actively used to monitor progress?
- ❑ Have people been formally assigned to the project, does it have sufficient resource to compete the scheduled tasks?
- ❑ Has risk been assessed, is there is risk log, are risks mitigated?
- ❑ Is there a process to manage changes to the scope, how has any changes been managed?
- ❑ Is there a status / highlight report regularly published, with RAG KPIs?

**How confident are you this project will deliver its stated benefits within the agreed time, cost, quality constrains? (LOW / MEDIUM / HIGH)**

# OK… But our maturity is very low… where should we start?

- What is a project?
- What is our list of projects?
- How are projects selected?
- What is our approach to managing live projects?

# Detailed Sponsor Checklist

| Initiation | Planning | Delivery | Handover & Close | Post project |
|---|---|---|---|---|
| ❑ Is there a clear problem that this project/programme will solve?<br>❑ Are there clearly defined benefits from solving the problem?<br>❑ Does the project align to and drive strategic priorities?<br>❑ Do you know project tolerances? | ❑ Is the Business Case still valid?<br>❑ Have tolerances been communicated to the project manager?<br>❑ Are plans realistic and take into account all necessary work?<br>❑ Are budgets realistic and take into account all costs, including post project?<br>❑ Have risk management plans been created and are they appropriate?<br>❑ Has the change effort been considered in plans and budgets?<br>❑ Has the project been baselined | ❑ Is the Business Case still valid?<br>❑ Are you receiving timely and accurate reports?<br>❑ Do you need to take action on reports?<br>❑ Are plans and budgets (incl. risk) up to date and accurate?<br>❑ Are you engaging key stakeholders?<br>❑ Is the Board functioning correctly?<br>❑ Is the project team dynamic working?<br>❑ Have lessons learned been captured? | ❑ Has the output been successfully handed over?<br>❑ Has the necessary change been successfully implemented OR are there sufficient plans and ownership in place?<br>❑ Have lessons learned been captured and shared?<br>❑ Has impact/benefit realisation activities (and other post project activities) been planned? | ❑ Are there clearly identified owners of benefits in BAU?<br>❑ Is progress towards impacts/ benefits tracked?<br>❑ Are impacts/ benefits being realised? |

# Next Steps

- Review your Project Delivery Framework

1

- Ensure you invest in training

2

- Embrace the technology

3

# Our Services

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HM Government G-Cloud Supplier

P3M3 AXELOS CONSULTING PARTNER

APM Training Provider Accreditation

## Technology

- Microsoft Project & Planner
- Wellingtone Accelerator+
- Microsoft Project Online
- PPM Support

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## Consultancy

- Project Management Maturity
- PMO Setup & Transformation
- OKR's & Benefits Realisation
- Project Assurance

## Training

- Customised Training
- APM Accredited Training
- Microsoft Technology Training
- eLearning Academy

## Wellingtone Community

Here to enable our clients, FuturePMO delegates and wider project management community to network, communicate and learn from each other. Lets learn, share and grow together!

W.

# Q&A

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