



Governance.Business  
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- LIVE WEBINAR -

# ENTERPRISE PORTFOLIO MANAGEMENT

21<sup>st</sup> NOVEMBER

November 19



## What we will cover today

- Introductions
  - The Need for Enterprise Portfolio Management
  - What the Analysts are saying....
  - What we see your Typical Issues to be
  - A Client Example
- 
- Questions

# Enterprise Portfolio Management

The *How* to implement matters just as much as to the *What*...

## Your Presenters



**Steve Beaumont**

Regional Manager UK,  
Ireland & Nordics - InovaPrime



**We Simplify Your Business**  
**...From Strategy to Operations - for the best results.**

**InovaPrime** is a fast-growing, innovative, consulting company that operates in areas such as governance, management and information technologies.

With many successes in implementing management solutions across a broad range of industries, from banking to aeronautics to consumer electronics, **InovaPrime** is at the forefront of the effort to provide management across all of these industries with the right information when decisions need to be made.



# Your Presenters



## Holger Heuss

Interim Head of Advisory and Consulting  
– IPMO Advisory AG



### ABOUT IPMO ADVISORY

**I** PMO Advisory AG is a Swiss company located on the lake of Zürich and has extensive experience across many sectors in innovation, design, teaching, advisory and consulting. Since recently, IPMO Advisory is has opened an office in Australia and has further plans for expansion in Canada. Its partners including AIPMO (Association of International PMOs) are focused on training, development solutions, higher education to the MSc and DBA levels in the field of Strategy, Project Leadership and PMOs. IPMO Advisory and its partners offer courses in locations such as London, Zurich, Geneva, Barcelona, Munich, Copenhagen, Perth, Sydney, Melbourne, Dubai, Kuwait, Bahrain, Riyadh, and Lisbon. [Read More](#)



**5**  
CONTINENTS

**19**  
COUNTRIES

**21**  
CITIES

<b>87</b>	<b>124</b>	<b>1200</b>	<b>10000</b> <sup>+</sup> hrs
Custom Tailored Courses	Public Training Courses Held	Professionals Certified	Consulting & Research

# Holger Heuss

## Companies

### Companies

#### Consulting

Accenture Strategy  
Global Lead Governance and  
Portfolio Management



PwC Consulting



#### Software

IBM Rational



Mercury,  
HP Software



### Professional Affiliations



# Holger Heuss

## Experience

Portfolio, Programme and Project management approaches and frameworks	Management of Portfolios	Managing Successful Programmes	PRINCE2
Iterative and incremental development management	Rational Unified Process	DSDM	Scrum
Agile Transformation	Certified Scrum Master	SAFe	DAD
PPM software	CA PPM	HP PPM	ServiceNow
PMO	Corporate/Enterprise	Programme/Project	
Customer Relationship Management	Salesforce	FinancialForce	Scoro



# The Need for Enterprise Portfolio Management

Making the right business critical decisions on strategic investments

# Effective Enterprise Portfolio Management is becoming more important

Enterprise Portfolio Management should be understood as a holistic system described by an underlying operating model

The benefits that can be described are as follows:

- Alignment of Investments to Strategic Objectives;
- Thorough Understanding of Resource Allocation;
- Provision of Advanced Data/Insights to Senior Executives;
- Informed Decision Making based on Factual Information and Analysis.



# The *How* to implement matters just as much as to the *What*...

## What The Analysts say

- “Specifically, customers interested in how to formulate an **overall PPM investment strategy, rather than just a PPM product implementation**, would find value in any services focused on that if they were more readily available.” *Gartner*
- “Sometimes organizations fail to **communicate their business problem appropriately to the PPM vendors**, which is because the market is facing a crisis of skilled workforce who can educate customers about the correct usage of PPM software.” *NewsWire*
- “It's been also noticed that several organizations already using this solution are facing **trouble in understanding the relevance and usage of the software post its implementation.**” *Gartner*



# Why we think that is the case...

Multiple parties are required to address the challenges provided

## Your Challenge:

- To compete in today's market, it is critical for any organisation to effectively manage all of their investments to gain transparency on expenditure, control costs, and track ROIs;
- There is usually a lack of internal skills and experience, in this specialist area, to implement best practice;
- Often politics and/or organisational set-up hinder the ability to deliver change;
- The strategic dimension, complexity and the potentially transformational benefits are often not understood.

## Consultancies

- Most have little market presence, due to lack of scale, or through leverage of offshore teams;
- PPM and PMO are understood as just another project management/process improvement opportunity;
- Specialist providers are typically aligned to only one technology.

## Software vendors

- Focus on the technical implementation only;
- Typically do not possess high-end consultative skills to define the Vision/TOM, the required processes and/or manage complex stakeholder relationships.



# What we see as your Typical Issues 1/3

## Lifecycle Stage – Strategy



- No common understanding of Enterprise PFM.
- No clear sight of benefits associated with Enterprise PFM .
- Business and IT are not sharing the same objectives.
- Insufficient level of senior management engagement within the organization.
- Corporate culture counterproductive to effective, standardised Enterprise PFM.

# What we see as your Typical Issues 2/3

## Lifecycle Stage – Transformation



- Topic is seen as too big and complex to address.
- Disparate stakeholder community.
- Constant scope creep.
- Unclear pathway to effectively roll-out of functionality.
- Undefined or ineffective processes.
- No / insufficient supporting Enterprise PFM tooling solution.

# What we see as your Typical Issues 3/3

## Lifecycle Stage – Execution



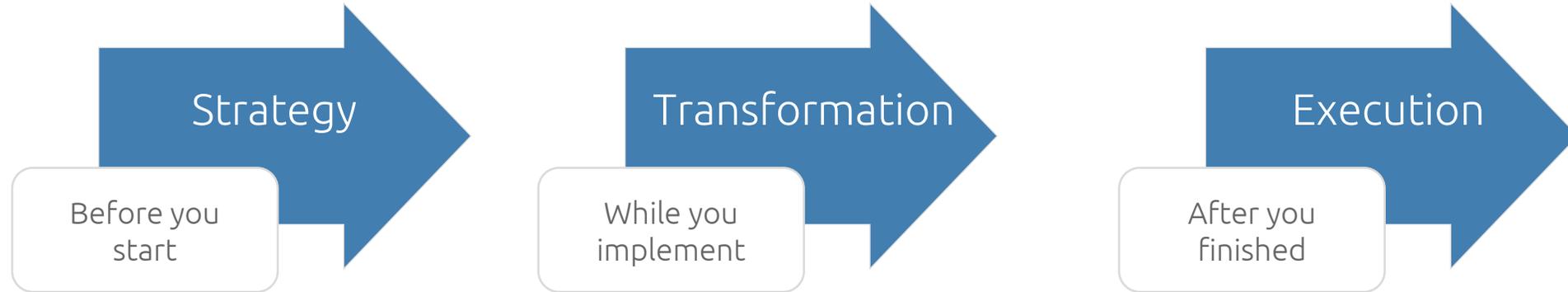
- No / insufficient Enterprise PFM capabilities.
- Lack of expertise / desire to set up own Enterprise PFM function or supporting tooling.
- Lack of adoption of standards / tooling by specific delivery portfolios.
- Wrong focus during initial implementation.
- Cost saving pressures.



## Past Clients



# Example: “Portfolio Adoption Services”



## Current Situation:

Client X recently finished the implementation of PPM Software across its entire organization (business and IT). The application has been handed over to IT for BAU management. There is still a high demand for changes to the system and the underlying process models. The original implementation has been replaced by the PPM software vendor’s professional services organisation, supporting Client X’s management in addressing those change requests.

## Problem Statement:

There is no clear strategy or roadmap for PPM at Client X, which results in frustration from key stakeholders, and a sub-optimal focus on small incremental changes rather than strategic improvements.

## Service Proposition:

Acting as transition support lead for PPM Software at Client X:

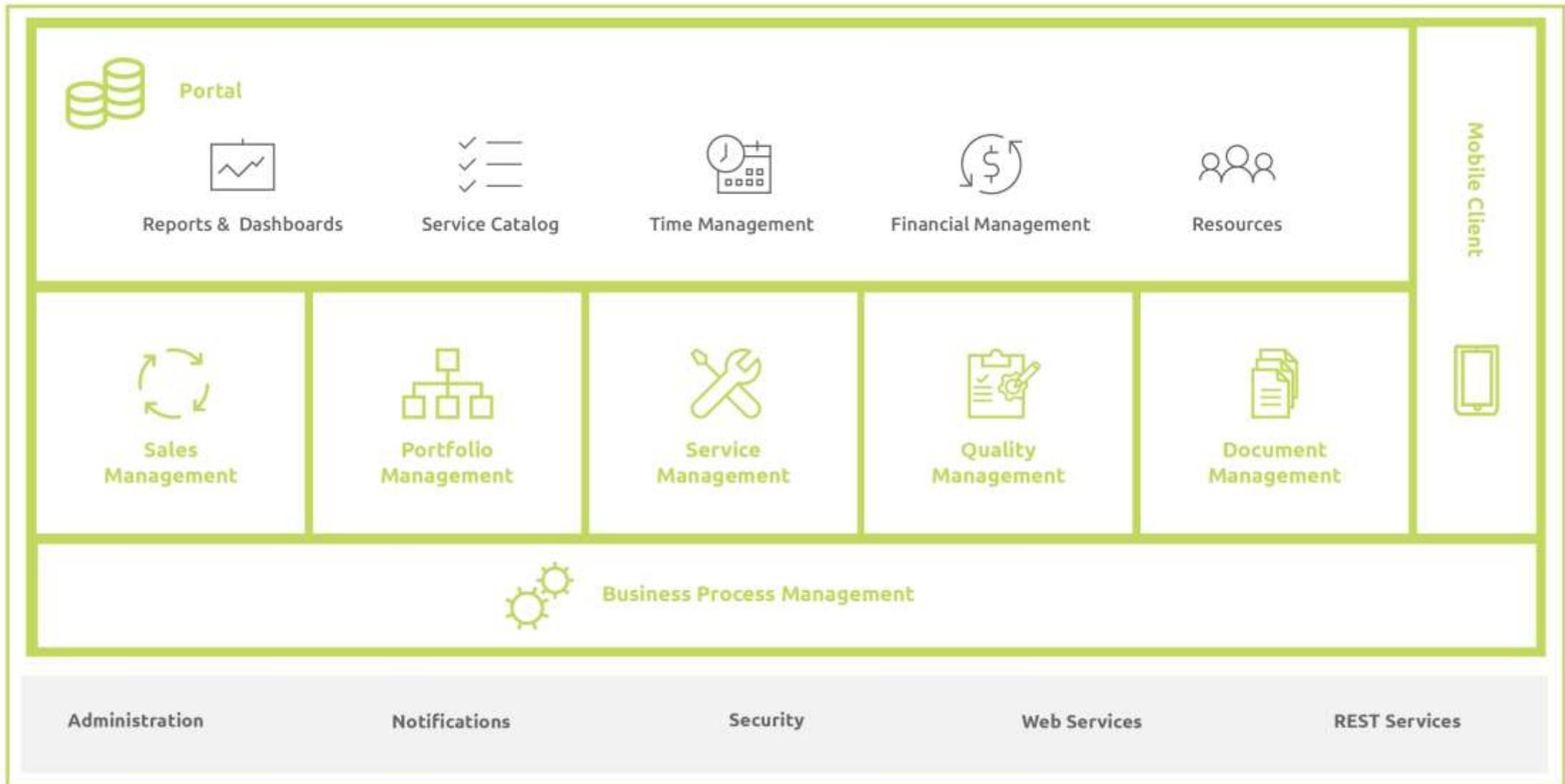
- Act as single point of contact for executive stakeholders, portfolio managers, and SMEs,
- Support portfolio specific transition & adoption activities,
- Provide strategic direction and develop roadmap,
- Provide coaching for internal resources to provide the above services longer term.



# Governance.Business

A brief insight into our business management platform

# The Governance.Business Solution



# Portfolio Management

## Key Capabilities

- Enhanced ability to make strategic choices and manage the portfolio.
- Visibility where to invest and how to reduce maintenance costs.
- Efficiencies derived from standard business process, application and platforms.
- Flexible hierarchy structure to manage investment by Services, Business Unit Organization, geography or functional Strategic needs.
- Gain early indication of cost deviations through financial summary pages.
- Manage and prioritize demand from budget and resource availability.
- Multi-dimensional resource planning and tracking.
- Non-intrusive time and cost management.
- Flexible and Powerful Workflow with audit trails.
- Bidirectional integration with Microsoft Project.
- Scenario based portfolio management.
- Powerful analysis and visualization experience.



# Questions



Do you have any  
question?



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# Thank You

[Visit our website!](#)

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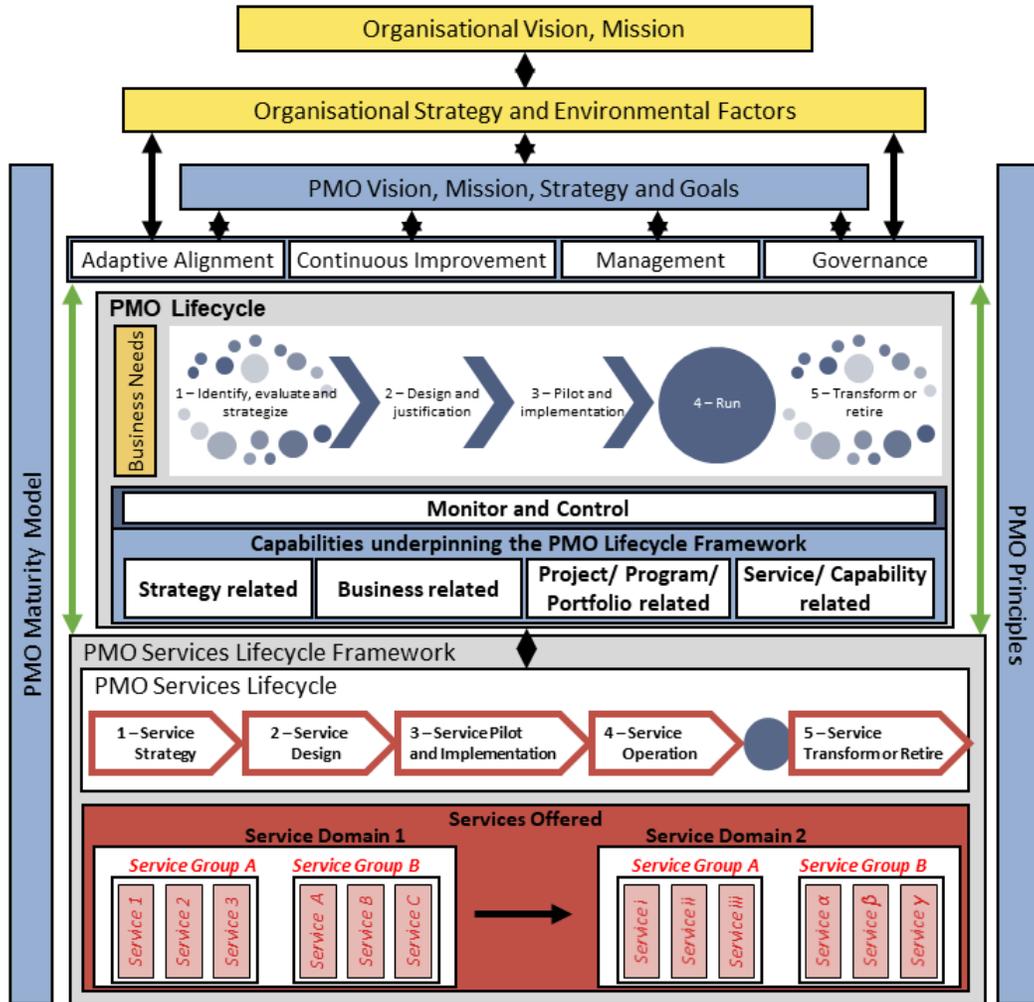
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# How AIPMO/ IPMO can help you

# IPMO Advisory – Consulting - Coaching



Organizational Strategy/Advisory

- Strategic Assessment
- Cultural Assessment
- Governance Assessment
- PMO Maturity Assessment
- Business Case Development

PMO Lifecycle Services/ Consulting

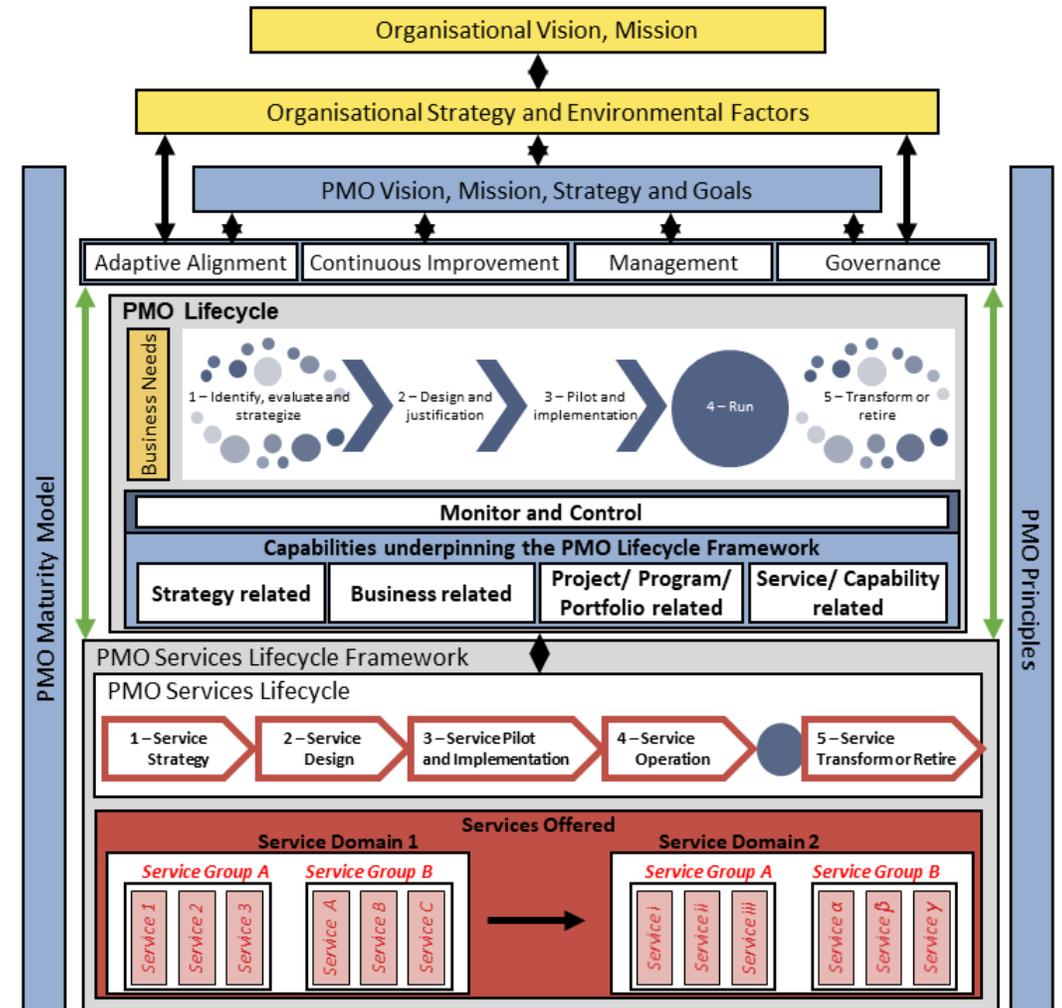
- PMO Organizational Design and Implementation
- PPP Standards and Processes Design and Implementation
- Competency Framework Development
- Training Needs Analysis
- PPM/PSA Tooling Evaluation
- PMO Run Support

Coaching Services

# About AIPMO

## MISSION:

To advance the understanding, the theory, the design and the implementation of high performing enterprise PMOs, through a comprehensive Certification Programme, based on AIPMO Body Of Knowledge.



# AIPMO and its Core Certifications



## AIPMO-E

*Expert* certification aimed at those managing an Enterprise PMO Topology



## AIPMO-P

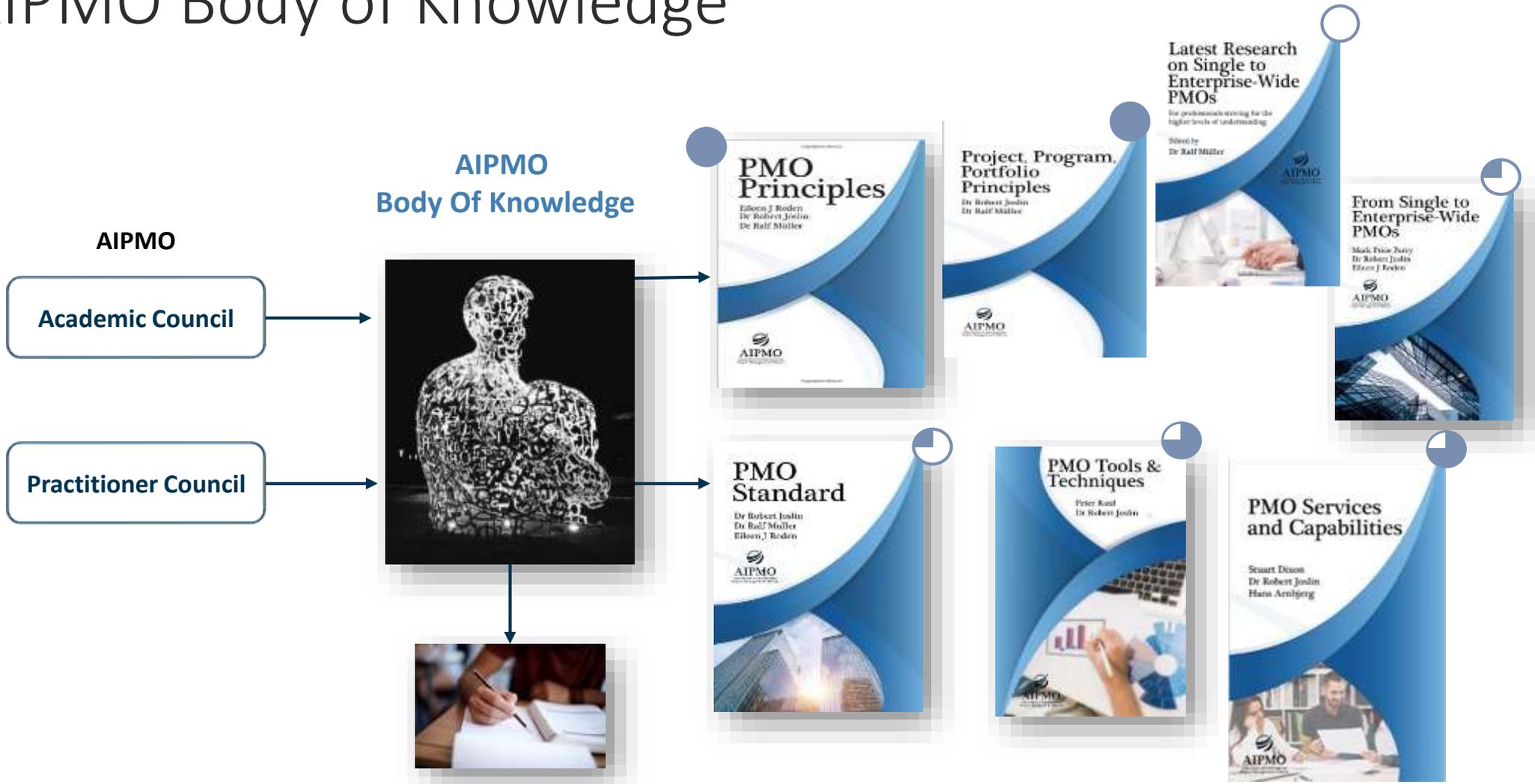
*Practitioner* certification aimed at those managing a PMO



## AIPMO-F

*Foundation* certification aimed at those working within a PMO

# AIPMO Body of Knowledge\*



Training materials driving toward the next version of the AIPMO PMO standard.

\*Body of Knowledge is not one book but a related set of architected books.

# AIPMO Councils: Internationally recognized academics & practitioners

Responsible for the **academic standing** of AIPMO in terms of research, findings and input into the PMO standard

## AIPMO Advisory Council



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Prof- Aaron Shenhar



Prof. Ralf Müller  
*BI-Business School*

## Chair

Responsible for the **practitioner standing** of AIPMO's written content in the standard, supporting guides and other practitioner artifacts

## AIPMO Practitioner Council



Dr. Robert Joslin



James Graham



Mark Price Perry



Eileen Roden  
*Wrote the P3O standard*

## Chair

Daily Operations