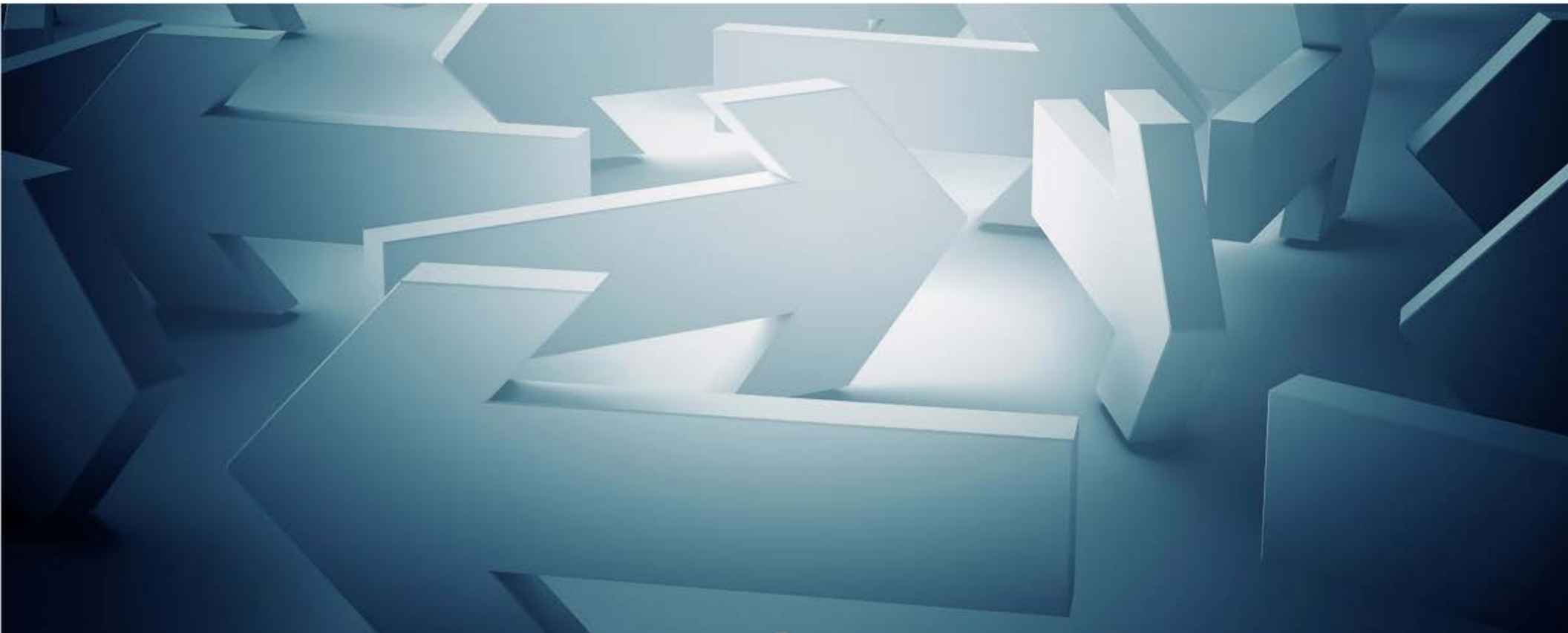




Playbook for the engaged enterprise™

Portfolio & Project Management • Agile • Lean Six Sigma



Introduction

For years Project Management has been asked to successfully deliver the products and services companies rely on for their financial sustenance and growth. The challenge is the upstream deliverables upon which all else depends (strategy, a portfolio of projects aligned thereto, and a continuous improvement policy), are not in place.

The establishment of the Project Management Office (PMO) in the last decades of 20th century was intended improve the execution of the portfolio. \$Millions were spent on the building a new functional group due to lack of alignment.

Research shows up to 67% of key functions and projects are not aligned with strategy. Up to 58% of organizations' performance measurement systems are unable to track performance of projects to strategy, and shockingly 95% of organizations do not capture lessons learned or apply them to future similar projects.

William George Associates (WGA) addresses this shortcoming by creating a model for the engaged enterprise™ where strategy cascades through the organization's planning and execution. All participants are aware of how their work supports the strategy.

Quality is the competency which defines critical business processes, metrics, and roles and responsibilities. This competency is responsible for furthering the organization's foundational culture of continuous improvement.

The final element is the Agile PMO (a-PMO™) which is responsible for planning, executing, and reporting status of all projects and product development initiatives in the portfolio.

WGA's approach integrates Strategy, Quality, and Execution.



WGA's capabilities and operating model for the engaged enterprise™



People

Knowledge

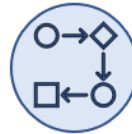
WGA has custom assessment tools to measure requisite knowledge of Portfolio Management, Quality, and Agile/Hybrid Project management and current capabilities related to critical competencies.

Skills

WGA develops and delivers custom training and provides coaching to build skills of the teams and stakeholders.

Certifications

As a certifying body in Agile and Lean Six Sigma, WGA has the certifications that solidify progress as an engaged enterprise™ able to shift with market forces.



Process

As a result of the organizational assessment, WGA identifies areas where processes do not exist, are not followed, or need to be optimized. These gaps are filled to improve the competencies of Strategy, Agile Thinking in market analysis and product conception, Portfolio & Project Management, all based on a solid foundation of Quality/Lean Six Sigma.

All Processes are developed and maintained by the Agile-PMO (a-PMO™).

The a-PMO™ contains Project Managers, Scrum Masters, Lean Six Sigma Green Belts, all governing processes, Reporting and Analytics capabilities, and Lessons Learned by project type.



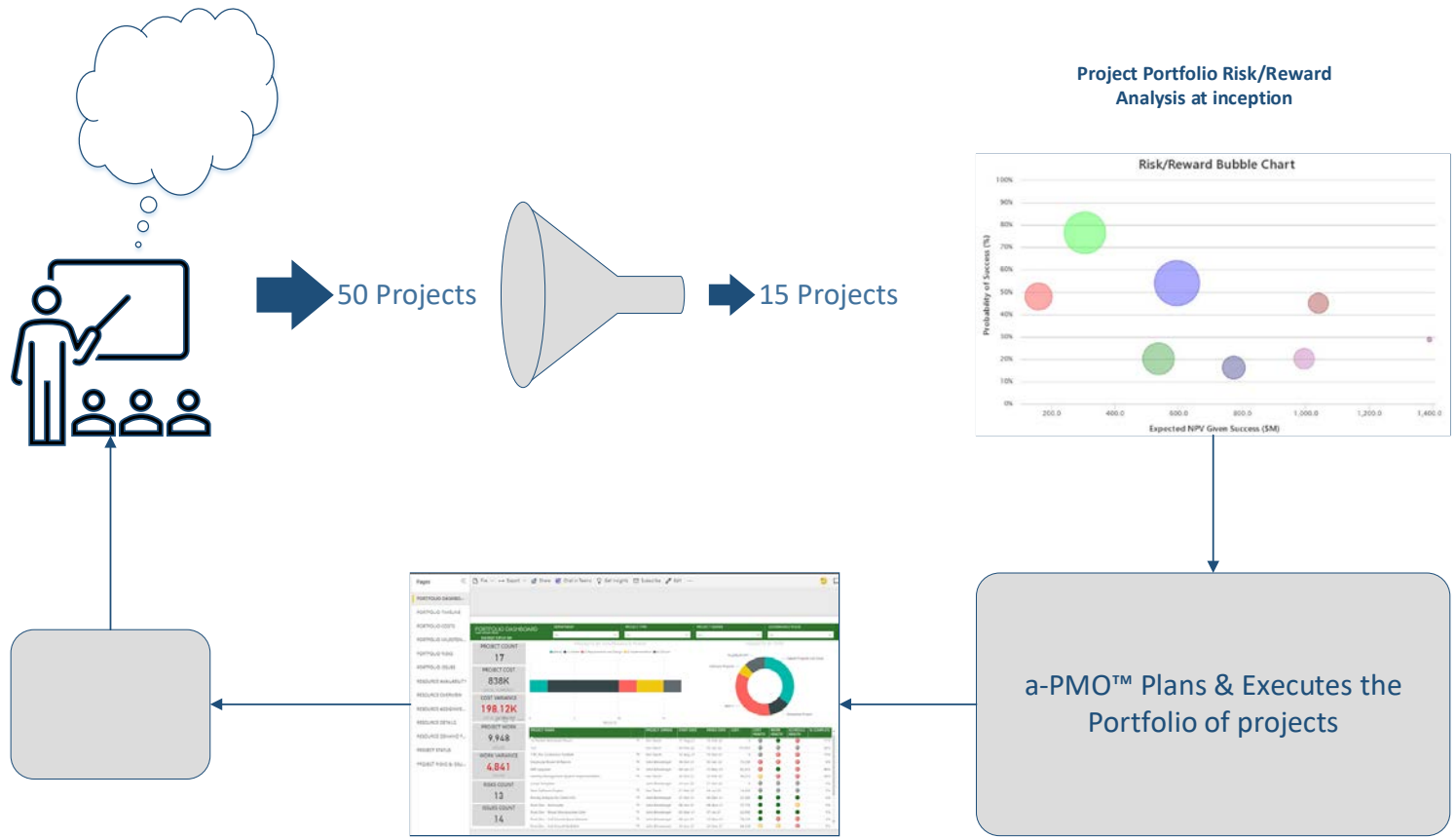
Tools

While WGA believes that optimized business process is primary, appropriate software tools and templates are needed to automate workflows, the planning and scheduling, and process, and progress reporting. The tools must support team collaboration and document versioning and control.

WGA recommends the use of enterprise class software that is highly configurable rather than requiring custom coding, does not require cultural changes for users, and has native BI capabilities.

WGA has a proprietary methodology and tool set to evaluate the performance of competing tools.

How it all comes together



engaged enterprise™ Transformation Blueprint

WGA uses Lean and Agile practices to minimize cost and maximize ROI for the client using our Blueprint services. First, Client sponsors and key decision makers are interviewed to capture their vision for the engagement, their expectations for outcomes, and suggestions for the makeup of the Core Team with all roles defined. With this information WGA is ready to kick off the engagement.

- **Baseline Analysis**
WGA analyzes current Strategy, Portfolio Management, Quality, and Project/Product development processes and measures the performance of the current portfolio for alignment and performance against objectives. It is from this baseline that engagement ROI will ultimately be measured.
- **Readiness Assessment**
Based on the findings of the Baseline Assessment and an assessment of the organization's culture and appetite for change a Readiness Assessment is developed. This includes recommendations for Core Team/CEO communications to the organization explain what the engagement's objectives are as well as describing the why the effort is being undertaken (Benefits, etc...).
- **Detailed Engagement Plan**
This plan includes engagement deliverables, schedules, risk plans, communications plans, costs and an initial ROI estimate.
- **Engagement Execution**
WGA will provide a Senior Program Manager as the engagement lead and the pattern of weekly status meeting with associated status reports shall be established.
- **Client Support Mode**
WGA will provide support for Client's engaged enterprise™ for 6 months measuring actual ROI against the initial/planned ROI.





About William George Associates Ltd (WGA)

For 20 years WGA has been one of New England's most prominent thought leaders in the Project Management space. WGA is an Agile and Lean Six Sigma certifying body as well as a training, consulting, and staffing firm. Having trained and certified over 6,000 professionals, WGA has earned a reputation as having the finest technical instructors in the region and consultants who deliver value far beyond the cost of their services.

As the world moves toward Agility and away from traditional Waterfall methods, WGA is establishing a new professional standard for Project Management infusing Agile/Scrum methods, Lean Practices, and Hybrid approaches.

WGA is honored to serve the needs of America's most innovative firms.

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