

# CHAPTER 1

---

## Connecting to Purpose and Achieving Change

This first chapter is focused on the understanding of the typical program's ecosystem. It is intended to highlight foundational program management principles that help the program manager to clarify the direction, align the key stakeholders, and design the program plans with the customer in mind. This is intended to enable setting the stage for the **Program Way** of envisioning the program and its components and set the execution steps on the right track.

In a fast changing world, where Artificial Intelligence applications usage increases, integrating connecting prevails, and cloud applications become the norm, the program managers become the future architects of change.

### 1.1 PROGRAMS MATTER

---

#### Key Learnings

- Understand the value of programs in the delivering strategic outcomes
- Get introduced to an excellence model to help you become more aligned in your program work
- Explore a case and an estimating tool focused on driving program decisions for speed and quality
- Learn how to develop the holistic views that prepare you to exercise the role of the program manager as the conductor
- Address complexity for better, customer-centered solutions

Project and program management have been maturing rapidly over the last decade. The signs of that are seen everywhere, whether in the increasing number of global events in the field, the awards dedicated to recognizing the impact of program and project managers, the refreshed value or program offices, and ultimately the improving business leaders understanding of that value programs strategically bring to their organizations.

The nature of programs is unique. The idea that one has an overarching connecting structure to its individual components, being sub-programs or projects, is a valuable one in creating the often-lost holistic visibility. Programs teach us to be strategic, they enable us to build capabilities and develop muscles that would otherwise be neglected without the discipline programs require and bring.

The simplest way to highlight the difference between a Program and a Project:

- Project = beginning and end with a focus on deliverables
- Program = connects the sub-programs and projects, continues this on-going connectedness, still could have a targeted end in sight, and is highly linked to strategic purpose the organization has for this integrated strategy execution vehicle

What makes the program manager role most unique is having to develop a suite of skills that differ or build on what a project manager must possess and that center on the need to constantly wear the hat of value. This is the link to the business cases behind the program and ultimately what one would refer to as the “so what?” that could be missed in the noise of high deliverables focus that prevails in the classical project environment. This heightened Business Value matters strategically as it allows the program manager and the program team to drive the entire cross-organizational engine toward value from the get go, rather than catching that later in the program journey at a much higher price.

One of the critical reasons why programs matter is the fact that stakeholders’ management and engagement is a key enabler for programs’ ultimate success. Program managers invest in being politically savvy and in creating the comprehensive understanding of the stakeholders that allows them to develop the right engaging and influencing strategies. The groupings of stakeholder into buckets, such as interested, involved, and impacted, ensure that the right bets are placed on who is going to contribute what and how to a program’s lifecycle and thus directly links to achieving a given targeted program’s business value.

### 1.1.1 The Siemens Case ---

Understanding programs’ complexity and finding ways to simplify it is critical. The changes that have been witnessed over the past decade regarding the importance and value of data have been immense. It is to be expected that digital innovations, and the associated data analytics and intelligence, will continue to dominate the next decade. Using case studies across global organizations help us shed the light on how to best break organizational barriers and create the right transformations in how we work and become more effective in achieving programs’ successful outcomes.

In this Siemens case, highlighted in the whitepaper,<sup>1</sup> Zeitoun 2021, a combination of the strength of simulation and the clarity of an integrated view of a program lifecycle gives us the edge in enhanced prioritization at the core and showcases how to achieve the critical focus shift to outcomes as needed in programs (especially what matters the most to customers).

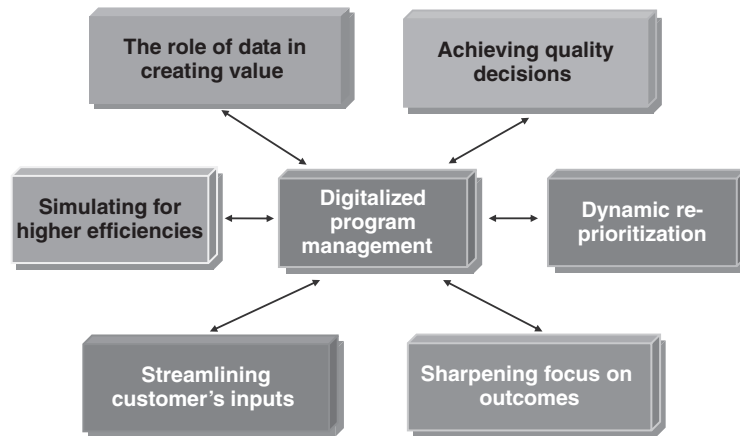
The role of data in creating programs value is multiplying. Simultaneous access to data via groups of stakeholders is critical to programs’ success. This allows the envisioning of the program’s roadmap, and the associated critical decisions, to become easier and more effective. Achieving quality decisions is enhanced with solid prioritization capabilities that include a dynamic re-prioritization capability that is becoming a must-have in the continually agile delivery of programs across organizations. Data seamless access allows us to achieve higher adaptability to changing program conditions and related external environment fluctuations.

As highlighted in Figure 1.1, the aforementioned elements are all pieces of the puzzle of the future digitalized program management. Program management is changing due to the degree of digital enablement. This is leading to a complete change of the way of working, collaborating, and most critically where the program managers spend their time to create the most impact.

The figure also shows the importance of sharpening the focus on outcomes and that leadership component, which has become a key to the role of program manager, more than just outputs’ focus. Additionally, streamlining customer’s inputs is becoming a top agenda of most organizations in their pursuit of the customer centricity expected in today’s and future businesses. This is achieved with the close mapping to the customers, their changing needs, their direct voices in the development and production process and establishing ongoing clarity through the noise.

---

<sup>1</sup>Siemens Whitepaper – <https://resources.sw.siemens.com/es-ES/white-paper-integrated-program-lifecycle-management-consumer-product>.



**FIGURE 1.1** Digitalized Program Management Effects

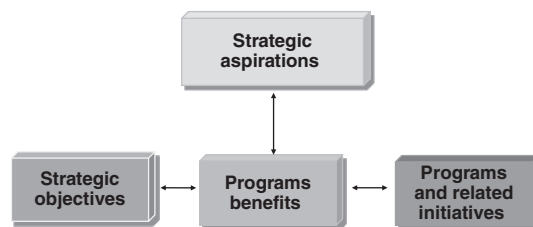
Speed is an expected way of the future and simulating the work of a program, and envisioning the entire program's roadmap is a great way to predict and prepare for risks and thus contribute to higher Efficiencies. Digitalized program management enhances efficiencies in addition to the previous effectiveness points highlighted in this case.

### 1.1.2 Connecting to Strategy

Strategy is difficult. Being strategic is an organizational muscle that requires continued investment in its development. Strategy is an articulation of the aspirations of the organization and the intended building blocks of the investments and work required to get there. Strategic Aspirations of an organization or a team are typically broken down into buckets of work (programs and projects) to be achieved in the form of certain outcomes over time horizons.

Figure 1.2 shows the bi-directional impact program benefits have on strategic aspirations in addition to the envisioning of programs and related initiatives. The figure also reflects the role of strategic objective in maintaining the strategic clarity and continually updating what strategic success looks like, while reflecting that in necessary directional changes.

Programs Benefits are the link to strategy. For that reason, the lifecycle of a program needs to be benefits-focused. A natural cascade takes place to allow for capturing the benefits and their correlation to achieving strategic outcomes. Programs and related Initiatives form a map of connectedness, via seeing all programs in an organizational portfolio and their exact contributions to strategy. Another valuable aspect of digitalized program management is strengthening this visualization of the interplay across programs. Strategic objectives are the other strategic ingredient in the program manager's arsenal. They provide the holistic views that drive program success and support the integrator role of the program manager.



**FIGURE 1.2** Program Benefits Strategic Links

### 1.1.3 Letter to the Future Program Managers\_\_\_\_\_

There are both concerns and equally a level of excitement about the future with the amount of disruption and the anticipated changing environmental and business dynamics. As a program manager you are in the right place at the center of leading through chaos and for creating opportunities. This brief letter to future program managers is intended to highlight some of the key anticipated shifts ahead, be aware of them, prepare for them, and ultimately put that readiness to good use in creating meaningful strategic impact.

The changing nature of your role and possibly title. Whether program manager remains as a title, or it get replaced with some elements of leading, collaborating, integrating, or driving, it is all about creating impact. There is a dominating need for servant or social leadership, where the program leader is able to adapt between being the coach and becoming the one carrying the program team across obstacles. Your future role is shaping to be the true organizational connector. Program managers have to have their voice in working across the business boundaries and continually breaking down actual and mental silos in the organization. Future program managers are connectors.

Readiness for that future also has growth and people components. The open window for continual learning is a feature that is strengthened by technology and artificial intelligence. This requires developing an appetite for your growth and for equally growing other key stakeholders around you. A more mature and developed stakeholder community directly contributes to making your future role most effective.

In the future, program managers will also have a vital impact on sustaining the growth of business and people. With the norm shifting to program managers being more aligned with the executive teams, being part of the most critical strategic dialogues and decisions, and having the right seat at the table, the value of program management continues to become more evident. This makes your role even more clearly strategic in terms of impact driving and affecting the future of organizations.

### 1.1.4 Strategy Execution and People\_\_\_\_\_

A well-planned strategy demands a clear roadmap for executing that strategy. This visualization of a strategic journey requires the collaboration of a large group of stakeholders, the right set of data, and an organized way to make sense of all the details. Program management's success is about connecting to the source, the strategy. Executing a program without a clear line of sight is a recipe for challenges, misalignment, and for potentially missing the mark on the right meaningful outcomes.

Strategy in the upcoming decade is expected to continue becoming more fluid. It is still going to be designed as a combination of ideas, aspirations, build on key discussions of stakeholders, and need programs as vehicles for getting from A to Z. Programs are critical for intentionally driving changes along the way and they use roadmaps to show the path forward.

People and the way they work are at the core of effective execution of these strategies. This is built on clarity of the strategy's purpose, effective communication of that purpose, and clarity of who is doing what.

Guided collaboration supports achieving people role clarity and directly contributes to the success of the Program Manager. This results in a number of important outcomes:

- Enables connecting the dots
- Integrates across stakeholders and their diverse interests
- Aligns across the business
- Achieves value to the business

### Review Questions

Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.

Why does the role of a program manager matter to achievement of business outcomes?

- Creates a handful of metrics to achieve control.
- Builds and integrates cross programs' focus on realizing benefits.
- Engages extensively with program stakeholders.
- Ensures executive team looks good.

How does digital directly help with enhancing programs' customer-centricity?

Choose all that apply.

- Sharpens the focus on outcomes.
- Expands the role of data in creating value.
- Supports knowledge-management infrastructure.
- Streamlines the customer's inputs.

Where do future program managers need to focus most to remain relevant?

- Getting done on time and within budget.
- Expanding tighter governance.
- Ensuring alignment of program with strategic drivers.
- Strengthening conflict resolution skills.

## 1.2 ALIGNMENT ACROSS DELIVERY

Although most companies understand the importance of achieving benefits from their investments, there is a possible worst scenario related to getting work done, resources used, and budget spent and then not realizing benefits. This late discovery could result in a multitude of unpleasant results, from the classic blaming exercise that could take place, to real consequences for the program team, or even external results that affect the viability of the organization with its customers and other key stakeholders. If positively handled, it would be a learning opportunity where the organization could rethink its program choice, its processes, and the supporting resourcing of people and technology.

### Key Learnings

- Understand the obstacles to benefits realization
- Linkages across: Focus on alignment across the 3Ps
  - Portfolios
  - Programs
  - Projects
- Explore program lifecycle phases to create a comprehensive understanding of the program
- Link to excellence by exploring the EFQM model (dynamics related to program management)
- Common reasons for tailoring delivery approach (why is this important and why one approach across program(s) does not work)

## 1.2.1 The Worst Scenario – Not Realizing Benefits

### 1.2.1.1 The Six Key Obstacles to Benefits Realization

#### *Obstacle #1 Stakeholders Involvement*

There is no targeted and active involvement of key stakeholders.

- Key to the success of your role as a program manager
- You won't get the right focus without the proper engagement

**TIP**

Invest in building the relation with key stakeholders and find ways to pulse what works best for their involvement in supporting your program's direction.

#### *Obstacle #2 Missing Benefits Plan*

The project or program is approved without a well-developed benefits realization plan.

- Not investing in developing one
- Who owns it?

**TIP**

Focus on knowing what the projects within the program contribute to achieving its benefits.

#### *Obstacle #3 Deliverables Emphasis*

There is a heavy focus on the projects' deliverables rather than on the creation of business value.

- Could be a negative thing
- Outcomes-orientation is what counts most

Another opportunity for aligning outputs to business value

**TIP**

Ensure being continuously strategic about the reasoning behind the program and the impact it is expected to create

#### Obstacle #4 Success not Clearly Defined

No Alignment on Program/Project Success Definition

- Programs could fail before they start
- Not just because of not spending enough in planning
- More an issue of taking the time to align around the definition of success

**TIP**

A key contributor to success is to use the breaks early on and ask questions to ensure we have a joint view of what success looks like before we run.

#### Obstacle #5 No Benefits Tracking

Failing to track benefits over the end-to-end lifecycle of the program/project.

- Not having the right measures or the right dashboard
- Needs some indication that we are on or off track
- Needs to be end-to-end

**TIP**

You need an approach to benefits tracking that integrates the program's components and their contribution to benefits.

#### Obstacle #6 Poor Change Management

Lack of an acceptable transformational and organizational change management processes.

- Program management is a critical strategic vehicle for creating a change
- Lacking proper change management processes creates gaps in understanding the transformation outcomes expected
- Goes hand in hand with the program management processes

**TIP**

Remember programs are there to create change. Change has to be managed and supported with the relevant processes and change leadership

### 1.2.2 The 3Ps: Definitions

The 3 Ps are project, program, and portfolio. As per the PMBOK® Guide, Seventh Edition, a project is a temporary endeavor undertaken to create unique product/service/result. When we go to the program level, we deal with related projects. This could be in the form of subsidiary programs or components. The program also has a set of activities. These activities are to be managed in a coordinated manner. The ultimate goal here is to obtain benefits not available from managing them individually.

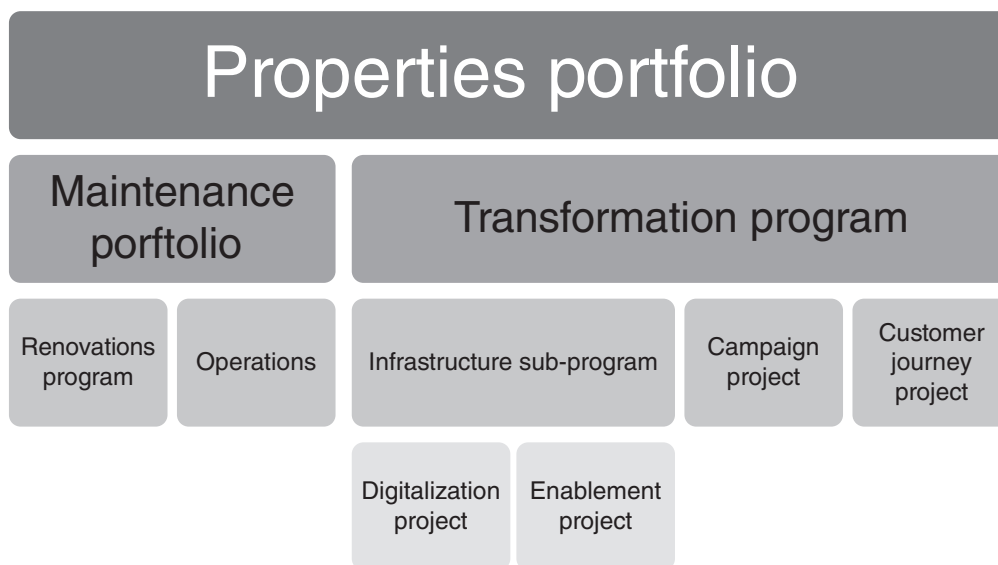
The portfolio on the other hand is the bucket that covers a multitude of components that summarize the organization's investments in its strategic growth. It includes projects, programs, subsidiary portfolios, and operational work

- manage as a group to achieve strategic objectives
- manage in an integrated and connected fashion
- it is the umbrella
- collectively drive what the organization does

It is critical to have clarity of how the 3Ps connect in purpose, scope, execution approach, and the ultimate achievement of the change effort.

### 1.2.3 Linkages Across Portfolios, Programs, and Projects

Mapping the linkages across the 3Ps is a strategic step that requires the right stakeholders to have the clarity of purpose behind the company's investments and the work necessary for the portfolio and its elements. Figure 1.3 highlights a sample properties portfolio. That portfolio could have portfolios within it. In this case a maintenance portfolio is shown and further broken down into an innovations program and also covers the related operations work.



**FIGURE 1.3** Sample Linkages Structure

In addition, the properties portfolio includes a transformation program that further cascades the elements of related sub-programs and projects.

**TIP**

Remember programs are there to create change. Change has to be managed and supported with the relevant processes and change leadership.

- Top level is the portfolio
- Then programs
- Sub-programs
- A cascade into levels of details
- Having that connected holistic view
- Could have a portfolio leader or manager looking at the connectedness across the portfolio elements

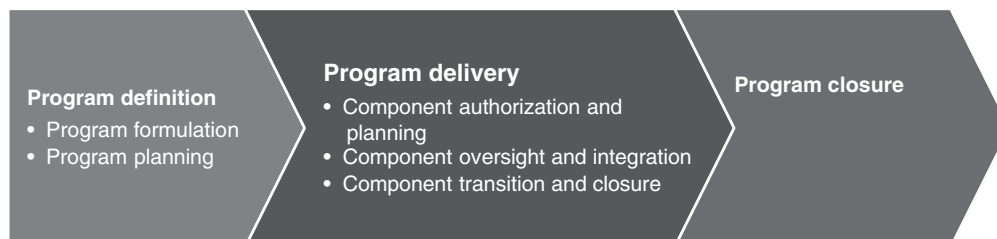
#### 1.2.4 Program Lifecycle

The program lifecycle is the journey from inception to completion. The envisioning and execution of the program requires an integrated view of the path to benefits. It assumes a strategic capability in the organization that allows leadership to coalesce around the interactions necessary to make a program a true success (Figure 1.4).

- Different from a classic project lifecycle that mainly has phases and gates
- Program charter drives the journey
- The front piece is very important
- Delivery has the heavy-duty work, yet the emphasis needs to be on the proactivity and planning aspects
- Closure also depends highly on what happened on the front and what success looks like
- Programs contribute to a culture of excellence in the organization

#### 1.2.5 Excellence and the EFQM Model

Excellence has been driving agendas of many global organizations. Alignment from the strategy level through the execution level to the results is a critical excellence enabler. A multitude of project management, change management, and quality management institutes and professional organizations have been supporting the practices that are key fundamentals to achieving that excellence.



**FIGURE 1.4** Program Lifecycle

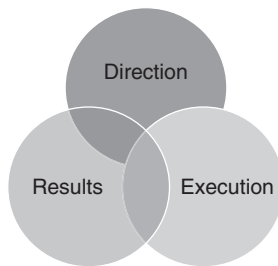
The European Foundation for Quality Management (EFQM) is such an organization example. Its practices relate to programs work and delivery excellence in three distinct ways:

- aligns strategy/benefits
- power of execution
- addresses cultural/leadership/ transformational capabilities

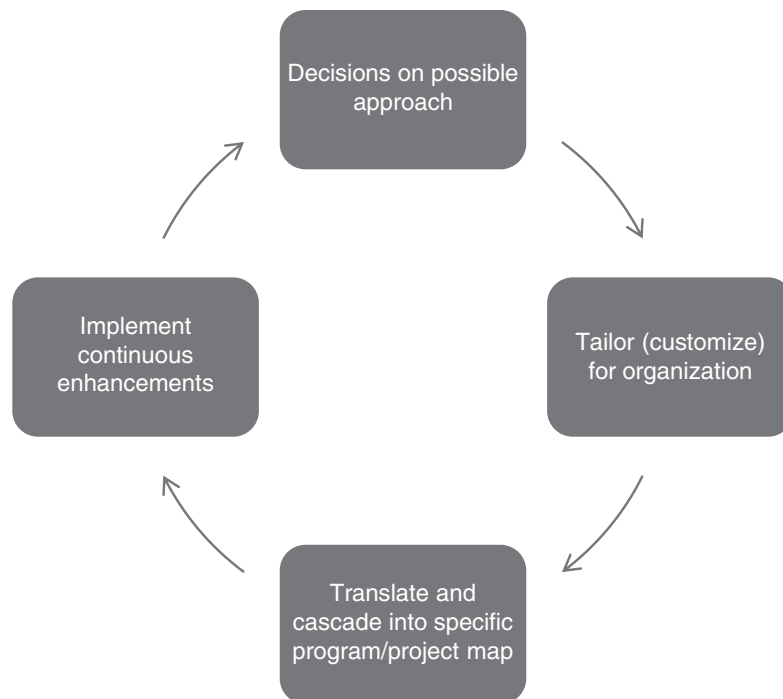
The principles of EFQM reflect the dynamic nature of continuous improvement needed for excellence (repeatability of successful patterns, time and again, thus using the programs vehicle as a mechanism to enhance excellence). Figure 1.5 shows the high-level connection between the program’s clear direction, the related necessary execution efforts, and the importance of continually calibrating that progress against meaningful results that matter to the purpose initially set in the direction part of a program’s journey.

### 1.2.6 Tailoring of Program Management Approach\_\_\_\_\_

- Figure 1.6 highlights that we need inputs throughout this tailoring journey, adjusting the program reasons, returning to the focus on the customer value, and that clear context matters



**FIGURE 1.5** Program Delivery Excellence



**FIGURE 1.6** Tailoring Concept  
Source: Adapted from PMBOK® Guide – Seventh Edition.

- Not a one-size-fit all
- The importance of being sensitive to the needs of the organization and the program, and most critically the benefits expected by the customers/users

**TIP**

The delivery approach of a program (and its components) has to fit the business context. The program manager should understand the reasons to use for that tailoring.

### 1.2.7 Reasons for Tailoring a Program\_\_\_\_\_

There is a growing list of reasons why the leader of a program would need to tailor the delivery approach. The following list is a starter kit for what you could think about, yet you should always be encouraged to adjust based on your organizational business context and your own program's ecosystem.

- Program's complexity level
- Program team's skillset
- Most suitable delivery approaches
- Program constraints (what might be limiting your results delivery abilities?)
- Global spread of program team (how do I tailor my way of working to best serve the distribution of teams and the virtual settings?)

#### Review Questions

*Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.*

Which of the following is a potential obstacle to achieving programs benefits?

- Clear definition of program success.
- Extreme focus on program deliverables.
- Good change-management process.
- A comprehensive benefits-management plan.

How does EFQM align the connected view of portfolios, programs, and projects?

Choose all that apply.

- Sharpens the role of culture on achieving outcomes.
- Expands the role of data in creating value.
- Supports the change focus of programs.
- Highlights the program manager's leadership qualities.

What is the greatest value of tailoring?

- It makes life easy for everyone.
- It achieves tighter governance.
- It offers the most suitable program delivery approach.
- It gives the scrum master choices.

### 1.3 SPEED AND QUALITY OF DECISIONS

---

Decision-making is a key ingredient of program's delivery success. There are many reasons why decisions could end up being inefficient or ineffective. Speed requires autonomy, alignment, and continuous access to the right data that supports making those program decisions timely.

Making the right decision, after having weighted the alternatives, requires leadership, holistic picture understanding, and balancing of the multiple competing interests and possibly complex constraints. Reaching high-quality decisions level is an ongoing development of a muscle many organizations struggle with.

#### Key Learnings

- Review Programs constraints and stakeholders competing demands
- Using the Samsung case to demonstrate alignment (how the organization demonstrated that)
- Exploring an Innovation model in delivering programs and projects (enhancing the quality of program success)
- Using the ABCD tool of Estimating as an example to address decisions biases (enhance the ability to make better decisions)

#### 1.3.1 Programs Constraints and Stakeholders

---

Stakeholders could be grouped into the buckets of being interested, involved, or impacted, or a combination thereof. Understanding where the program stakeholders' stand and having a plan to manage the engagement with them minimizes the wrong timing of unpleasant surprises. Having the right balance between program constraints and the positions of its stakeholders supports a program's success.

- Establishes minimum acceptable criteria for success
- Defines methods by which criteria will be measured and communicated
- Ensures consistency with expectations and needs of key stakeholders (within the competing demands)
- Reinforces program alignment for maximum benefit delivery (across the needs of the core stakeholders)

#### 1.3.2 The Samsung Case

---

Enhancing the organizational decision-making ability is directly linked to the level of alignment across its stakeholders. Figure 1.7 highlights an interpretation of what Samsung has potentially changed over the years to enhance the success of the organization in being a leader in innovation while remaining centered on the customers' continually changing needs.

- Create the creativity and focus on competing stakeholders' demands
- Right balance of governance to continue to achieve speed
- Safety in the exchanges
- Key example to maintain the innovation focus

#### TIP

Programs, when linked to business value, and are executed as part of an innovation strategic priority, result in stronger alignment and more effective decisions.

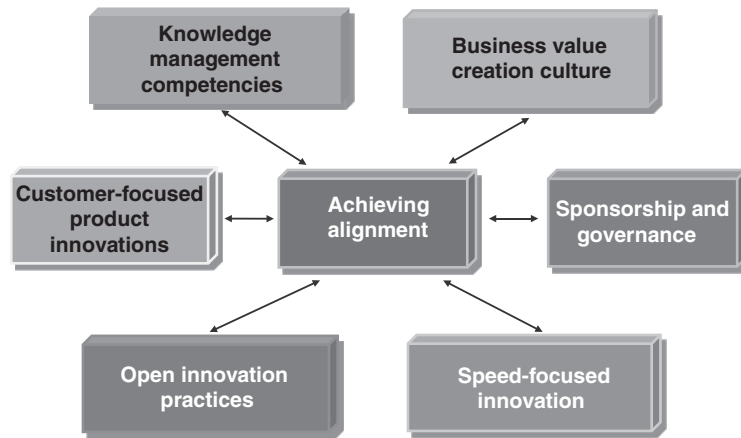


FIGURE 1.7 The Samsung Alignment Sample

### 1.3.3 An Innovation Model

Innovation models or frameworks help connect an organization and its product and program teams. In Figure 1.8, the innovation model demonstrates the importance of why culture, strategy, and ways of working should come together, to give experts and other supporting teams the opportunity to make innovation a priority. This sets the tone for the collaborative environment where quality decisions thrive and program teams enjoy the change outcomes created by their program work.

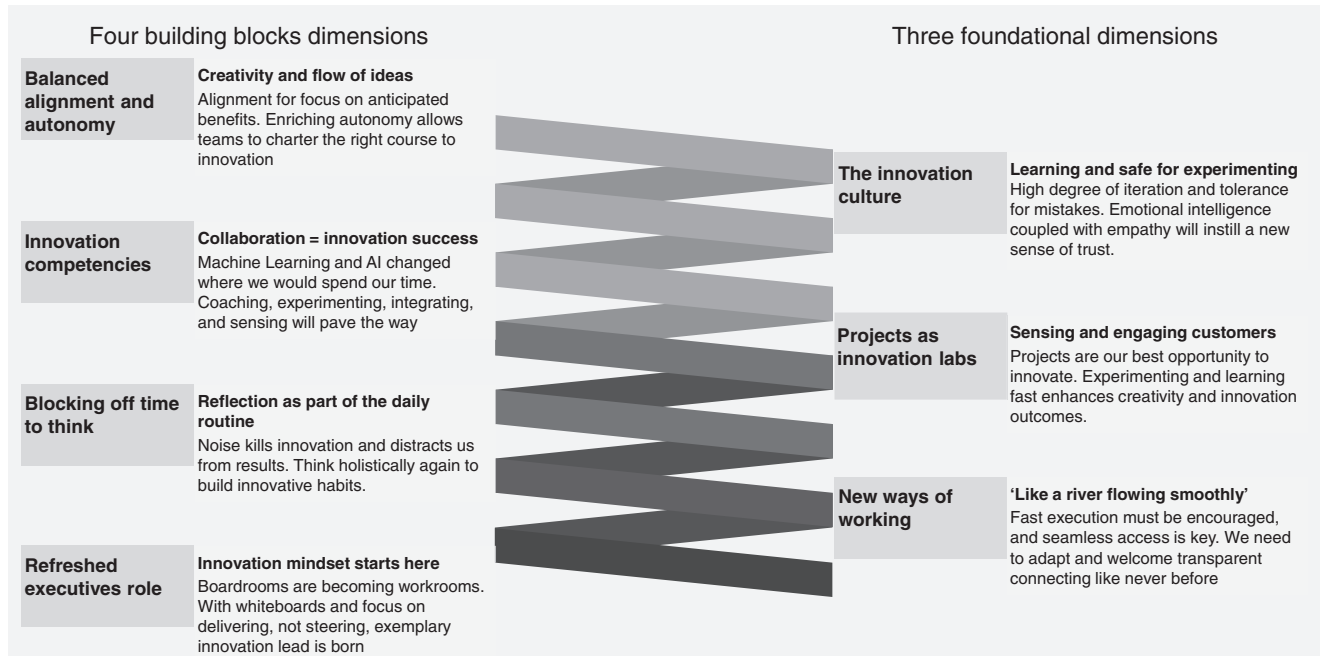


FIGURE 1.8 The Innovation Model<sup>2</sup>

<sup>2</sup>The Innovative Culture Model has been developed by Zeitoun and published as part of the Siemens Digital Industries Software white paper, Simcenter: the heartbeat of the digital twin, adopting a digital mindset to deliver and scale future innovations ©2021 Zeitoun. All rights reserved.

### 1.3.3.1 Four Building Blocks Dimensions

1. Balanced Alignment and Autonomy
2. Innovation Competencies
3. Blocking Off Time to Think
4. Refreshed Executives' Role

### 1.3.3.2 Three Foundational Dimensions

1. The Innovation Culture
2. Projects as Innovation Labs
3. New Ways of Working

### 1.3.4 Why Do We Have Program Estimating Bias?\_\_\_\_\_

When estimating the efforts required leading to making critical decisions, care should be taken, given the potential high number of stakeholders and its contribution to creating bias. Bias could come from a variety of sources and unaligned stakeholders' agendas don't contribute to the most effective decisions. A program's wrong or poorly communicated assumptions limit our ability to make high-quality decisions. Tools such as ABCD estimating could help the program manager.

As in Figure 1.9, programs could benefit from the elements of that tool are important to estimating that encompass ways of estimating together with the program team's need to clearly capturing and communicating assumptions, together with the contingencies that reflect an understanding or the program's risks and how to better plan for them.

The following list captures many of the reasons why we could have bias and the behaviors that would limit our ability to make proper program decisions timely.

- Program manager believes team will work harder than is feasible
- Creates overambitious schedules
- Executives want a particular deadline
- Program manager can't say NO
- Program is intentionally underestimated by sales to win a proposal
- Program begins with a good schedule
- Scope creep leads overly optimistic schedule (uncontrolled changed to the program scope)
- Human tendency for optimism (contributes directly to bias)
- Murphy is alive and well, so things will go wrong and thus I need to have contingency and properly document as highlighted in the ABCD tool to positively enhance the quality of program decisions

#### **ABCD estimating**

**A = Assumptions**

**B = Basis:** expert judgment, analogous, parametric, and, three point

**C = Contingency**

**D = Documented**

**FIGURE 1.9** Minimizing Estimating Bias

### Review Questions

Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.

When should program metrics be established?

- As more program components get executed.
- During the chartering process.
- As the stakeholders deem it necessary.
- A comprehensive set of metrics should be defined at program closing.

How does the innovation model described support the delivery of successful program outcomes?  
Choose all that apply.

- Making reflection a part of the program manager's daily routine.
- Expanding the quality thresholds.
- Enhancing balanced collaboration and digitalization.
- Refreshing executives' roles

Which of the four elements of the estimating model shown need to be continuously updated throughout the program lifecycle?

- Basis
- Documented
- Assumptions
- Contingency

## 1.4 THE CONDUCTOR

Describing the role of the program manager could take many forms. One of the favorites could be the orchestra conductor. The anticipated integration emphasis played in the role of the program manager and the need to align across a diverse set of stakeholders make the conductor analogy a fitting designation. One of the experiences worth discovering though would be to get the opportunity to go deep in understanding the role of the orchestra conductor and see that although it is such a critical role, the quality of the outcome of that musical delivery ultimately rests with the orchestra itself, its training, and its achieved harmony.

### Key Learnings

- Positioning the capabilities of the Program Manager with an eye on the conductor role
- Applying the balcony versus dance floor model to create impactful holistic views
- Tool that could be used in multiple settings (being holistic and integrative)
- The Program Charter as the key to the conductor's toolbox
- Why is this an ingredient for tools you could put into action?

### 1.4.1 What Does a Successful Program Manager Look Like?\_\_\_\_\_

One of the team building exercises that are worth implementing would be to get a white board and draw a picture of what a successful program manager looks like! It is always fascinating to see how many different views could result from such a creative, yet simple exercise. In a practical sense, answering this question is an important task to accomplish.

Ultimately a successful program manager achieves the anticipated results of the program, builds a strong team that could repeat these successful outcomes in other future programs, and is a leader who is able to properly balance, people, process, and technology as essential for achieving change in the future of work.

The following list highlights what good looks like:

- Aligns the investment in the program to the strategic objectives of the organization
- Strategically aligned
  - Connects the components of the program in a way that increases likelihood of higher efficiencies
  - Utilizes resources well
- Align around benefits
  - Keeps the eyes of the program team members focused on the realization of program benefits
- Stakeholders can be all over the place so I need to use my conductor value to bring alignment back
  - Integrating across program stakeholders like a conductor would
  - Connect the dots
- Make sure the orchestra is delivering

**TIP**

Your success as a program manager is linked with how well you practice the conductor role to align your team and stakeholders around delivering change outcomes.

### 1.4.2 The Program Manager Conductor\_\_\_\_\_

- As clearly shown in Figure 1.10, there are strong analogies between playing music and running a program. The role of a Conductor is to unify a large group of musicians into a core sound instead of a wild bunch of different sounds surging out
- The program becomes similar to the nicely played piece like the one we enjoy going to the theatre for
- Sees what good looks like
- Steps back and sees the cross dynamics
- Brings the team toward benefits and strategic outcomes

### 1.4.3 What Could Happen If We Don't Look Holistically?\_\_\_\_\_

This conductor analogy continues to help us rethink the role of the program managers. Since strategy is about clear purpose and its execution is about getting resources aligned and moving toward that purpose, this analogy works. The ability to be that holistic and see how the parts are continually connected is such a critical program muscle.

The following could be consequences when we don't maintain that holistic view:

- Losing sight of what strategically matters
  - This is naturally a disaster
  - Missing the right priorities



**FIGURE 1.10** The Conductor  
Source: takazart / 360 images.

- Lacking clarity in programs' roles and responsibilities
  - Many data points confirm that this contributes to program failure
  - You want to reverse that
- Achieving deliverables' delivery success and failing to get customers what they truly need
  - Been in so many cases where a client could be in a different place than my assumption that we are ready
- Program team's burnout and mental fatigue and associated losses in productivity and creativity
  - Program manager should maintain the clarity and objectivity of views

#### 1.4.4 The Analogy of Balcony Versus Dance Floor\_\_\_\_\_

Another analogy, as highlighted in figure 1.11 relates to the importance of the strategic and holistic view is being on the balcony versus being on the dance floor. Leaders realize the importance of this. This contributes to the adaptable mindset that program managers should possess. Program managers tend to be more successful when they have the ability to create the distance and see better where some of the gaps might be in what is happening in front of their eyes on the dance floor, or in the deep work the program team is involved with. They should also have the ability to roll up the sleeves and jump right back into it and be in the trenches with their program team colleagues.

A few points to remember about this tool:

- A tool that goes directly to the toolbox
- Creating the distance
- Action is great, yet you got to find the moment to step away
- Create the objectivity and holistic view
- See the politics and the gaps of what is happening or not



**FIGURE 1.11** The Holistic View

Source: StockSnap / 27551 images.

#### 1.4.5 The Program Charter

There is an increasing programs complexity. Technology demands are increasing, cyber security is a major issue, sustainability is a major strategic priority, and stakeholders' expectations are steadily increasing. These continual competing demands on the program manager require that a tool for laser focus is used. Without such focus, the likelihood of expectations creeps (e.g. why don't you also do this while you are at it?) and will also continue to grow and programs and projects will not meet their expected destination targets. When this is coupled with ownership gaps (e.g. it's not my job), then alignment matters most.

The Program Charter (the best tool in our arsenal for common vision).

When we look at the charter for its true value given that it provides the guardrail for why we do the program/project and the expected view of what success looks like, we see that it is also a great opportunity to say NO. Saying NO is a muscle that has to be well developed for the program managers.

Among the most valuable reasons to have a program charter are its ability to address:

- Clear view of program success/associated strategic benefits (Without it, no clear view of what success is to be achieved)
- Strategic metrics/guideposts to confirm eventual acceptance (A few short concise pages that give us a strong starting point)
- Strategic risks/assumptions to consider (at least high level)
- Program governance framework (key abilities to make decisions, within and outside your control and the close relationship to the program sponsor)

### 1.5 ELABORATING THROUGH COMPLEXITY

One of the determinants of the future of work is the ability to adapt. Programs' lifecycle typically encounter multiple changes. The ability to be resilient in the face of the changes and to act decisively and quickly to adjust, is becoming one of the top ranked qualities that program managers should possess. Elaborating through complexity means that we start with what we know and continue to peel the onion, get more information, ask the right questions, and exercise immense amount of collaboration within and across teams.

### Key Learnings

- Progressive Elaboration as a theme: “Ongoing dynamic view of taking complexity into something simpler to handle”
- Balancing uncertainty, change, and complexity
  - Unique view of managing program success
  - Different from the land of projects
- Using the Scaled Agile Framework (SAFe) model to manage scaling complexity
  - Great opportunity to look at different ways to scale complex programs
- Highlighting clarity and cascading complexity using the Facebook case
- Identifying the role of continual prioritization and progressive elaboration in driving programs success
  - Key mechanism for the way to plan and execute the work of the program

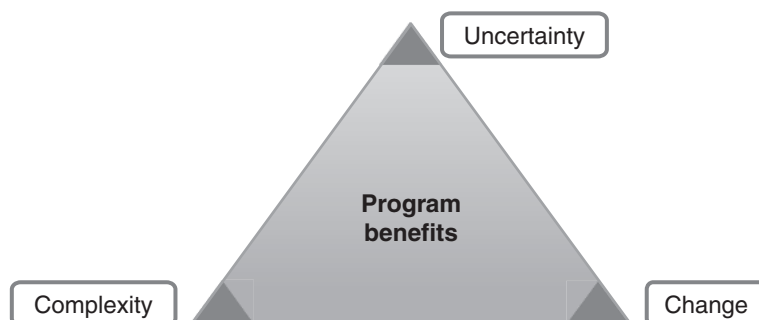
#### 1.5.1 Balancing True Program Constraints

In the larger and more integrated setting of a program, it is no longer your classic project constraints of cost, schedule, and scope. Figure 1.12 shows program constraints expand to cover complexity, uncertainty, and change. This is going back to the strategic role programs play. This shift from the traditional scope, cost, and schedule constraints is critical in order to balance the true pressures placed on the importance of achieving program benefits. Many programs could easily fail if they focus on the classic constraints and end up winning the battle and losing the war.

Central focus on benefits (understanding the role of aligning the program team and the stakeholders strategically around the benefits) becomes critical. This has to be coupled with high degree of sensitivity to the changing work dynamics (mix of the team, ways we govern, competing demands, all have to be balanced).

#### TIP

Remember programs are unique in their focus and conditions. Change your perspective from the classical project constraints to the program ones.



**FIGURE 1.12** A Program’s Competing Constraints

### 1.5.2 Scaled Agile Framework (SAFe)

The framework is a useful instrument for scaling complexity in programs and across the organization. Given that SAFe could look across the enterprise and tackle the required governance across the layers of portfolio, large solution, program, and then further down to the team, cascading and mapping across these layers work well. In the program layer, the ability to have the focused release train concept drive experimentation, integration, deployment, and on demand release enhances the opportunity of effective delivery of programs' value. Connecting metrics, roadmap, and the vision is also instrumental for enhancing the balance through complexity.

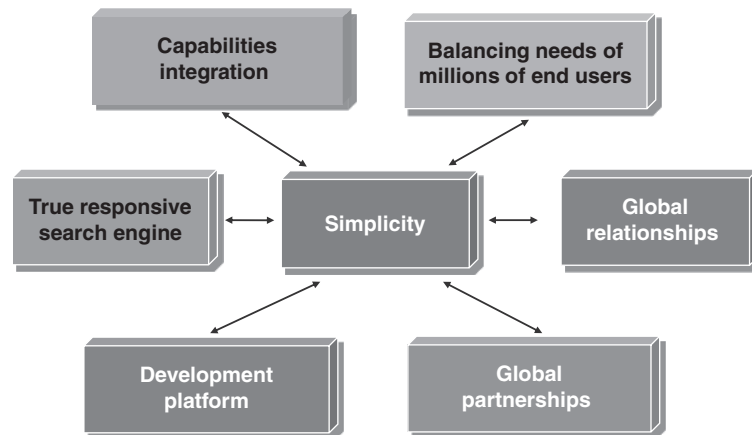
Program managers should explore and experiment with the SAFe layers. As a framework, it is helpful in better understand the interoperability between portfolio, program, and projects. To reflect on how deep team interactions take place, one should get into the team layer and reflect on how governance is conducted. Another beneficial aspect is that this framework builds on the Agile practices (incremental ways of delivery leading to a changed way of governing).

#### SAFe Principles<sup>3</sup> help us manage program complexity:

- (1) Take an economic view
- (2) Apply systems thinking (critical to the agile mindset and the end-to-end view)
- (3) Assume variability; preserve options
- (4) Build incrementally with fast, integrated learning cycles
- (5) Base milestones on objective evaluation of working systems
- (6) Visualize and limit WIP (work in progress/process)
- (7) Apply cadence, synchronize with cross-domain planning (e.g. releases and associated iterations)
- (8) Unlock the intrinsic motivation of knowledge workers (team layer is well addressed)
- (9) Decentralize decision-making
- (10) Organize around value (critical outcome from the framework)

### 1.5.3 The Facebook Case

Leonardo da Vinci said: "Simplicity is the ultimate sophistication." In the case of programs and program management, he would have not been more correct. With the massive data, number of users relationships, partnerships, and many other resources to balance, as reflected by figure 1.13 in the case of Facebook, it is critical that we find



**FIGURE 1.13** Facebook and Simplicity

<sup>3</sup><https://v5.scaledagileframework.com/safe-lean-agile-principles>.

the recipe for what works for a given program or a portfolio of programs and projects that would allow us to achieve simplicity, create clarity, and communicate in a consistent way across the organization and the program team.

- Simplicity is the core in order to handle program complexity
- Global mindset in relationships and partnerships building and investing
- Create responsiveness that aligns with the behaviors and patterns of different program users
- Handling the complexity for such a mega community of users is a strong example of building simplicity into a program's way of working

#### 1.5.4 Progressive Elaboration

This concept is critical for the future of programs and projects success. The key takeaway of using this tool is continuously elaborating as more details become available. This helps us deal with complexity, allows us to make progress, and ensures getting value out of the door and in the hands of customers and users faster. This is also why this concept or tool is an important principle in portfolio, program, and project management certifications.

The idea is that the program managers start with what they know and then roll with it as they uncover more meaningful details and get wider access to relevant data. This ability to adjust and shift allows the program manager to also play a key role in driving initiatives that relate to Environmental, Social, and Governance (*ESG*) strategic objectives that organizations prioritize.

To summarize the most useful dimensions of this concept:

- Usually refers to ability to add more details as uncertainty decreases
- Critical way of thinking and working in programs and projects today given the need for speed and the frequent occurrence of starting programs without full understanding of requirements (balance between what it minimally required and what I can extract later on)
- Supports organizational agility principles (helps on both waterfall and agile delivery models)
- Helps us with customization of best fitting program delivery approach

The value of the **progressive elaboration** way of working is further expanded when we consider the elements of the VUCA conditions that surround most modern programs. This requires the program manager to adapt well to handle the amount of volatility, uncertainty, complexity, and ambiguity that is increasingly the norm for running and changing the business. Additionally, since each project and a program is surrounded by Enterprise Environmental Factors (*EEFs*), many of which are outside the control of the program manager, there is a growing and vital role for progressive elaboration to address these program constraints.

#### Review Questions

*Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.*

How does the analogy of conductor relate to the role of the program manager?

- Programs are like music.
- It illustrates the need for strong control of team members.
- It shows the importance of the alignment of various team members' roles.
- It is a way to show the team who is boss.

(continued)

How is having a holistic lens critical for programs success?  
Choose all that apply.

- Reflecting on how the pieces are fitting together.
- Getting onto the balcony is always great.
- Ensuring that the program manager is not involved in the details.
- Enhancing the leader's objectivity.

Which of the four elements below is valuable to include in the program charter?

- Detailed deliverables
- Documents control process
- Success definition
- List of all stakeholders

When is progressive elaboration most valuable?

- As program managers become more experienced.
- In most cases, because there is usually a level of uncertainty in programs that would only unfold over time.
- When the number of stakeholders increases.
- When clear and comprehensive requirements are in place

How does SAFe help us in handling and scaling complexity?  
Choose all that apply.

- Build incrementally with fast, integrated learning cycles.
- Base milestones on meeting delivery deadlines.
- Centralize decision-making.
- Refreshed executives' roles.

Which of the following elements contribute to Facebook's illustration of handling complexity?

- Addressing the needs of select end users.
- Increasing documentation.
- Integration capabilities.
- Staying focused on the Facebook way of working.

## 1.6 MANAGING CHANGE MATTERS

This part of the chapter is focused on programs' contribution to transformation and achieving change.

1. Understand the balance between running the business and changing the business.
2. Reflect on change models that help you develop your change agility.
3. Learn the critical ingredients for successful digital transformation.
4. Explore the change maker role and its value across the program lifecycle.
5. Develop an appreciation for the engagement strategies necessary for creating buy-in.

### Key Learnings

- Important foundation for shifting to the change management mindset
- Using the SAP story to highlight a critical solutions implementation success enabler
  - As an example of a mega enterprise solutions organization to show the important of the change management mindset
- Defining the meaning and connection between run the business and change the business
  - Separating the project and program way of doing things from the traditional getting stuff done
  - Why does creating this understanding matter for the success of program work?
  - Culture changes in the organization
- Connecting change to achieving strategic outcomes
  - Very important element to the end-to-end connection needed for program work

#### 1.6.1 The SAP Story and Achieving Change\_\_\_\_\_

The theme for this story is to take an example of a high tech global organization and exploring the following focus: Imbedding the change management practices into the implementation rollout.

- Early realization of the criticality of change management in the successful roll out of enterprise solutions worldwide (Managing resistance is critical to managing changes in the created new ways of working.)
- The importance of achieving a common level of program/project management maturity across the organization (in this case by looking holistically across regions and using some model like Kerner's or Capability Maturity Model Integration (CMMI) to achieve maturity commonality in use of change and project/program management practices)
- Linking the performance of program managers to the achievement of the desired program change for customers (what we don't measure does not create the right supporting behaviors)
- The developing role of the Global PMO (to help connect ownership like in this case of working across a global organization, centralizing ownership supported the repeatability of certain success patterns)

#### 1.6.2 Run the Business and Change the Business\_\_\_\_\_

As much as running the business is critical for sustaining the organizational footprint, it is changing the business where the innovations are and the growth excitement resides. Programs and projects are the vehicles for achieving such change. Figure 1.14 highlights that a balance is needed, while we realize that as we continue

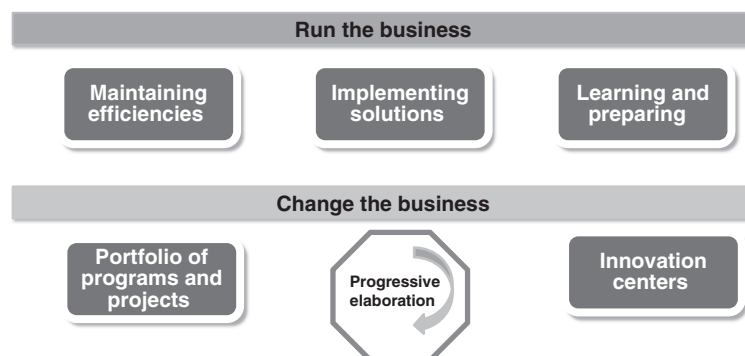


FIGURE 1.14 Achieving Change Balance

moving toward the program/project economy of the future, the balance will be tilting toward changing the business, and digitization could likely take care of most of the running the business parts of the future organization. This will continue to have distinct implications on the make-up of program teams and the relevancy that program team members and experts bring to the mix.

- Running the business is done by many, as in the case of business units and back-office entities
- Changing is not about just maintaining efficiencies, or learning for the next time around
- Changing the business requires a different set of skills, e.g. the 3Ps or portfolio, program, and project cascade or the capability to progressively elaborate and continually refine and iterate
- Changing motivates the innovative mindset as highlighted by the innovation model in earlier lesson to bring continual innovation and creative ideas that support excellent practices in the change environment associated with program work

### 1.6.3 Connecting Program Change to Strategic Outcomes\_\_\_\_\_

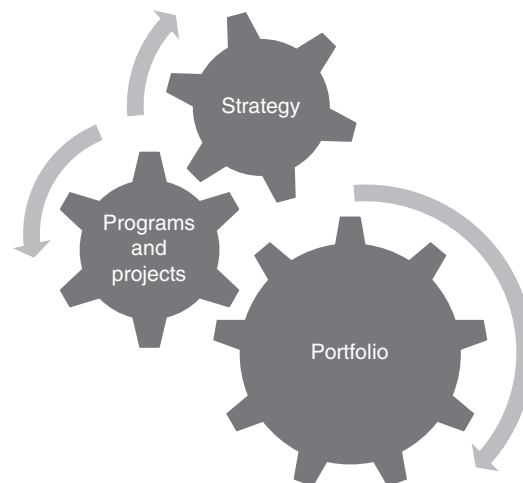
This cascading point is important in reminding us that programs create change that is connected to strategic outcomes. This cascade ultimately connects to operations, where running the business is. This also means that there is continual feedback loop that affects the future mix of programs and projects and the next set of portfolio choices.

Programs are focused on creating the valuable change to organizations

- This view in Figure 1.15 confirms strategy drives portfolios that are broken down into programs and projects. The outcomes go into operations and continuous feedback affects the prioritization and future changes
- That connectedness owned by a PMO, a sponsor, or other leaders is a critical to the change focus

The dynamic nature of feedback and continual learning contribute to realizing change value:

- Openness is key ingredient to program work
- Knowledge management focus is central to this process
- Continual success



**FIGURE 1.15** Connecting Strategic Outcomes to Change

Source: Adapted from the PMBOK® Guide – Sixth Edition (Part 1), Figure 1-4, Page 17.

### Review Questions

Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.

Making sure that there is a continuous revisit back to the strategy is fundamental to programs. Why was change management highlighted as a critical muscle in the SAP story?

- Technical details of the enterprise solution
- In most cases, there could be a perception of complexity and resistance to implementing new solutions.
- When the customer asked for it.
- Too many chefs in the kitchen.

What has been driving the increasing focus on growing the business?

Choose all that apply.

- The Project Economy is here.
- Executive maturity in understanding the role of programs/projects.
- Boredom with operations.
- The fun of growing the business.

Which of the following illustrates the importance of connecting program changes to strategic objectives?

- Change is difficult.
- Increasing governance.
- Achieving the change value.
- Staying focused on the bottom line.

## 1.7 ALIGNING ACROSS HEARTS AND MINDS \_\_\_\_\_

### Key Learnings

- A word that program managers continue to think about and use is alignment
- We look at models and agility topics to align the hearts and the minds
- A real cascade to create focus is central to this lesson
- The worst scenario – not being aligned
  - From real-life stories, this could be a nightmare as it shows major program gaps such as in the case of vague roles and
- Linkages across phases and enablers of change in ADKAR's Model
- Use Kotter's 8 steps to drive from creating urgency to embedding change
  - Both models create energy for change, its urgency, and what it takes to implement change
- Examples of change agility
  - Why is this becoming a very important quality that future leaders globally need to possess in the next decade?
  - Builds on the changing the business aspects from previous lessons

1.7.1 The Case for Alignment

Alignment is one of these power skills of program managers. This contributes to multiple opportunities for the program managers to successfully move the needle closer to achieving the strategic value of the programs work. Here is a possible list of what alignment contributes to:

- Improving performance; by linking to the strategic direction of the organization
- Empowering people; by allowing them to self-organize when there is enough alignment balance
- Motivation
  - Understanding how the pieces fit
- Allowing experimentation; given the availability of a guiderail
  - Key ingredient of future organizations
- Improving program teamwork; with clarity of roles and responsibilities
  - Reaching a high performing team
  - Trust becomes the foundation
- Motivating stakeholders; given their ability to engage with clear programs' direction
  - Motivating for the extended program stakeholders as they see and experience how well the program team is connected

1.7.2 ADKAR Model<sup>4</sup>

- Figure 1.16 highlights ADKAR’s enablers. Key elements around awareness, desire, knowledge, and reinforcement

Employee phases of change ↓	A	Awareness of the need for change	<ul style="list-style-type: none"> <li>• Management communications</li> <li>• Customer input</li> <li>• Marketplace changes</li> <li>• Ready-access to information</li> </ul>	Enablers
	D	Desire to participate and support the change	<ul style="list-style-type: none"> <li>• Fear of job loss</li> <li>• Discontent with the current state</li> <li>• Imminent negative consequence</li> <li>• Enhanced job security</li> <li>• Affiliation and sense of belonging</li> <li>• Career advancement</li> <li>• Status or change in social standing</li> <li>• Acquisition of power or position</li> <li>• Incentives or compensation</li> <li>• Trust and respect for leadership</li> <li>• Hope in the future state</li> </ul>	
	K	Knowledge on how to change	<ul style="list-style-type: none"> <li>• Training and education</li> <li>• Inform action access</li> <li>• Examples</li> <li>• Role models</li> </ul>	
	A	Ability to implement required skills and behaviors	<ul style="list-style-type: none"> <li>• Practice applying new skills or using new processes and tools</li> <li>• Coaching</li> <li>• Mentoring</li> <li>• Removal of barriers</li> </ul>	
	R	Reinforcement to sustain the change	<ul style="list-style-type: none"> <li>• Incentives and rewards</li> <li>• Compensation changes</li> <li>• Celebrations</li> <li>• Personal recognition</li> </ul>	

**FIGURE 1.16** ADKAR Model and Enabling Change  
 Source: Adapted from <https://www.prosci.com/methodology/adkar>.

<sup>4</sup><https://www.prosci.com/methodology/adkar>

- Linking programs to purpose
- Designing program lifecycle phases with change management in mind (e.g. the SAP change story and using the model to remind us of key enablers, like training, taking fear out of the way, or running meetings differently)
- Using ADKAR to understand the focus required for realizing benefits (review each of the elements in relationship to realizing benefits)

### 1.7.3 Kotter's 8 to Focus on Implementing Change\_\_\_\_\_

Figure 1.17 shows a simplified view of Kotter's 8 model. This is an easier model to relate to and implement from a program standpoint. As many programs are executed to drive transformational change, the 8 steps in this model map nicely to what program managers would need to do to properly plan and to prepare the organization for the anticipated change. The 3 buckets of creating the climate, engaging, and then implementing the change map nicely to the program lifecycle and the increasing focus on achieving strategic benefits.



**FIGURE 1.17** Kotter's 8 and Implementing Change  
Source: Adapted from <https://www.kotterinc.com/methodology/8-steps/>.

### 1.7.4 Creating a Climate for Change\_\_\_\_\_

Create a Sense of Urgency – changing the business is what we are after in program work, focus

Build Guiding Coalition – across stakeholders and stakeholders' groups

Create the Vision – ultimately achieve a climate that ensures the vision is clearly understood

#### 1.7.4.1 Engaging and Enabling the Organization

Communicate the Vision – simplicity, like in the Facebook Story, or the cascading using the progressive elaboration

Empower Others for Action – commitment matters most to creating the change

Create Short-Term Wins – agile or not, try to find ways to create the wins fast and establish commitment

## 1.7.4.2 Implementing and Sustaining the Change

Consolidate; Don't Let Up – momentum around the change (key to the role of the program manager in connecting the dots)

Institutionalize – sustaining the change created by the program's benefits

## 1.7.4.3 Change Agility Examples

Builds nicely on instituting the change

World events, COVID, and disasters lead us to expect that things are done in a different ways and cadence. The following reflects such a climate for change:

- Organizations applying a varied mix of waterfall and agile across business lines
  - The future of work is hybrid
  - A pharma company having to follow rigorous process for the high regulatory compliance components, whereas agile is used to deliver innovations and accelerate time to market – selective application of agile principles, e.g. getting vaccine out fast (agility mindset all the way from the top, culture adaptability, and new ways of working)
  - An energy company applying waterfall for the very complex structured program work, while its IT uses agile practices to deliver a continuous stream of deliverables and fast – there is room for both process repeatability yet you can imbue an opportunity for the right mix of some agile principles
- Agile models of contracting even in the construction industry – program manager makes the right decision of how much agility versus set structure is most suitable to the context of the program

### Review Questions

*Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.*

In the ADKAR's model, where do you see the most emphasis on aligning hearts and minds?

- In the "K" phase where training is provided.
- In the "D" phase where a sense of belonging is created.
- In the "A" phase where barriers are removed.
- In the "R" phase where celebrations take place.

In which of the following elements of Kotter's model do you see the alignment with the program stakeholders' engagement necessary for implementing change?

Choose all that apply.

- Build guiding coalition.
- Create short-term wins.
- Institutionalize.
- Communicate the vision.

Which of the following shows how the use of a mix of program frameworks supports change agility?

- Using a consistent method to address the needs of the customer.
- Total autonomy.
- Applying waterfall for complex program work, while agile practices help deliver a continuous stream of deliverables.
- Staying focused on increasing alignment.

## 1.8 DIGITAL TRANSFORMATION\_\_\_\_\_

### Key Learnings

- Organizations into the next decade will continue to think digital transformation, technology reliance is increasing, and the pace is getting faster
- This lesson gets into the transformation mindset and culture, and it is a chance for program managers to show their caliber in working with stakeholders
- Humans 2.0 or 3.0 are the future of getting the right balance between humans and technology
- Need to think of the elements that could be applied on a daily basis to ready the teams and organizations for digital transformation
- The myth behind digital transformation and why 70% of these initiatives fail
  - Data points from Gartner and others that confirm a consistent high failure rate
- The role of culture in the necessary programs' experimentation safety
- Explore the connection between proper program planning and being in the 30% of transformations that succeed
- Resilience – The Antidote for Change
  - Why is that quality such an important component to inject in the digital transformation programs to increase their chances of success?

### 1.8.1 Why Do 70% of Transformation Programs Fail?\_\_\_\_\_

- It's not the technology mix
- It's not just the lack of proper planning (sometimes there is even a massive investment in planning and even great interest from executives)
- It is the gaps in designing the purposeful ingredients:
  - A collaborative culture
  - A focus on guiding principles
  - The human enablement (the future for the program managers is to ensure that we are highly centered on the human element)
  - The right level of digital integration (make sure that the right level of integration coupled with the proper assumptions)

#### TIP

The human element is central to the success of transformation programs. These programs don't fail because of technology.

### 1.8.2 Digital and Programs Decision-Making\_\_\_\_\_

The future of work has vast opportunities for the program manager with a variety of decision-making tools. This is going to be critical in rethinking where do program managers spend their time and create the most value of their roles.



**FIGURE 1.18** Data-Driven Decision-Making  
 Source: geralt / 25597 images.

As illustrated by figure 1.18, digitalization will continue to enhance the speed and quality of decision-making:

- Digitalized economy – capitalize on intelligence
- Artificial intelligence
- Internet of things (IOT)
- Use of “Big Data” – find ways as a program leader to focus much more on trends, program direction, and doing half time adjustments, thus directly affecting program success
- Analytical statistics

### 1.8.3 Culture and Programs’ Experimentation Safety\_\_\_\_\_

Program managers should have a very good sense of their environment and realize the criticality of having the right supporting program culture. There is a strong need to rethink things and to continuously remember that culture is fundamental to the program’s success.



**FIGURE 1.19** What Is the Dominating Organizational Culture?

As captured in figure 1.19, program managers and change leaders should make sure:

- It is transformative
- It is not fear infested
- That you get rid of blame dominance as it directly negatively affects success
- Transformation success hinges on how innovative the team is

### 1.8.3.1 Culture and Programs' Experimentation Safety

- Important in operating with agility and equally in digital transformation
- Cultures that focus mainly on command and control would not be effective in the future
- While the program manager could create an experimentation program team culture, it needs to be supported by a safe corporate culture that encourages ideas to flow freely, is transparent, and rewards collaborative behaviors including openness of feedback
- This creates more fun and innovation and contributing one-2-one to the success of digital transformation programs' success

## 1.8.4 Effective Program Planning and Digital Transformation Success\_\_\_\_\_

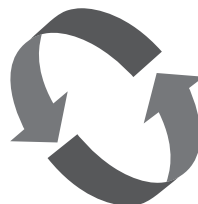
As highlighted earlier in studying the reasons why digital transformations fail, effective program planning is a must if we would want to effectively turn the ship that is headed for disaster and to safeguard organizational resources.

- Link to strategic planning
- Doing the right steps upfront as in the program charter
- Formulating the roadmap

Understanding the environment especially with the increasing volatility around us, this leads to a solid program plan

- Ensuring the alignment to a clear strategic purpose
- Rigorous chartering and sponsoring process that considers risk and the environment – creating a higher and closer understanding of the risk, thus the proactivity needed for digital transformation
- Builds on a clear roadmap that strongly connects stakeholders – envisioned pathway from A to Z
- Needs to address digital transformation with the multitude of change management skills we have been addressing across this chapter

### 1.8.4.1 Resilience



Resilience is a key contributor to better handle change and directly contribute to programs' success:

- Part of the nature of change
- Seen in the dynamics around programs
- To handle dysfunction in the program team
- To address lack of clarity of success upfront
- Needed to polish one's leadership quality
- Curiosity muscles development needed to ensure how ready we are
- The capacity for a program team to absorb high levels of change while displaying minimal dysfunction
- Sets the stage for a new definition of program success
- Is not purely a trait, it can be developed and nourished (needs to put myself in complex situations, dealing with politics and ambiguity as part of the nature of the world we live in)
- A leadership competency that ties to the curiosity muscles (role of knowledge and managing knowledge)
- Dominates future workplaces (centered on how resilient could I be)
- Links to the growing project economy focus (a growing future realization in terms of understanding the strategic role of project and programs and thus the need to exhibiting resilience in that future organization)

### Review Questions

*Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.*

Which of the following contributes the most to successful implementation of digital transformation programs?

- Rolling out with a focus on what each functional area needs.
- Creating a comprehensive mix of technology solutions.
- Detailed planning.
- Building a collaborative culture.

Which of the following elements contribute to the healthy culture needed for successful programs outcomes?

Choose all that apply

- Fear
- Experimentation safety
- Command and control
- Free flow of ideas

Why is resilience the trait that is expected to dominate future workplaces?

- It is a cool trait.
- It is similar to emotional intelligence.
- It absorbs high levels of change and creates high performance.
- It supports resisting program change.

## 1.9 THE CHANGE MAKER

### Key Learnings

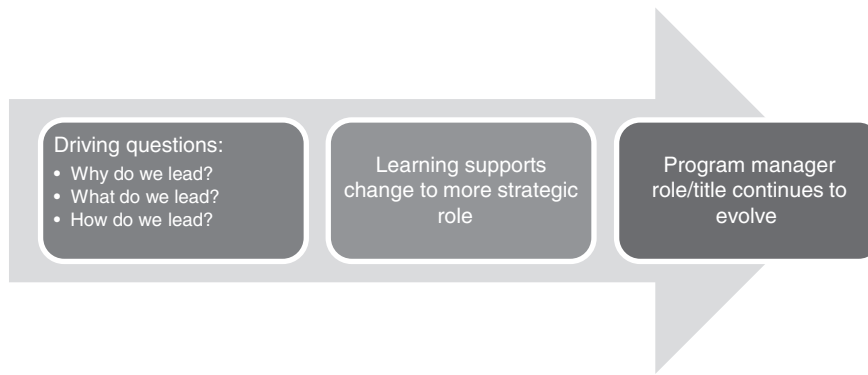
- Make the impact of the program manager complete the notion of being a change maker
- Especially due to the strategic role of programs
- A must learn set of attributes and qualities that make us stronger in creating change
- As a reminder the balance between running the business and changing the business
- What and how to develop those qualities needed for our role as program change managers
- The SAP example and how to motivate change makers – making sure implementation is connected with the change
- The learning sponge as a way of leading change – capitalize on that to lead change
- Understand the meaningful program lifecycle points that make change successful
- Map the EFQM model leadership and process elements to the change maker role – how much is there emphasis on the right change attributes

### 1.9.1 The SAP Story and Change Makers

- Inclusion of change in SAP's solutions implementations and sophistication of roll outs worldwide
- The realization that all solution rollouts are making critical changes in the customers organizations
- The advancing program delivery capabilities that are resonating with change makers and next-generation PMs – how he or she will drive change, what is required, and what is expected of the users in the organization's SAP works with
- The maturing of the view of program management as a different making capability – next-generation program management should understand the change making role
- The strength of program management in connecting the stretching strategic agendas of organizations, including DE&I and ESG – continuing to make a difference in the form of the program work, stretching my capability organizationally speaking in terms of tying the work to the strategy
- Which means that organization executives are attributing their success to it! – getting executives' attention to ensure the importance of the change making function, this will also show that program management has reached an excellence level in the corresponding organizations

### 1.9.2 The Learning Sponge

- Figure 1.20 reflects some key building blocks to developing the learning sponge such as: The importance of knowledge management
- Sets the foundation for a program manager to stretch the leadership qualities
- Opening the appetite for learning
- Focus on ways by which learning can support the change
- Unlearn, relearn, and learn some new things
- Thus grow the roles and functions of the program manager and spill that learning over to the program team and the surrounding stakeholders' environment



**FIGURE 1.20** Developing the Learning Sponge

### 1.9.3 Program Lifecycle Points that Make Change Successful\_\_\_\_\_

As we look across the program lifecycle phases in the Standard for Program Management – Fourth Edition, and see the connections and related detailed steps in the 3 phases of program definition, program delivery, and program closure, one would notice the importance of:

- Connecting change to the program lifecycle
- Activities to plan for, monitor, control, and administer changes during the course of the program
- Nothing should be managed in isolation
- We are unifiers, integrators, able to see holistically, getting on to the balcony
- Supplementing the lifecycle phases with change management elements
- Update the learning along the way as we move toward closure
- Become an organization and team able to administer changes in a way that is clearly aligned with the program journey
- Practice change management throughout

### 1.9.4 EFQM Model and Change Maker Competencies\_\_\_\_\_

- Figure 1.21 highlights many of the attributes that are relevant to the role of the program change maker
- Decision-making and the quality of decisions matter
- Can't afford weaknesses in decision-making muscles



**FIGURE 1.21** Change Maker Competencies

- Balancing the people and technology side with having the right processes in place
- Leadership qualities, like relating with compassion while maintaining the value focus and excelling in the communication as the key connector
- Similar to what we described earlier about the value of the conductor role in what a program manager does

### Review Questions

Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.

Where are the key overlaps between change management activities and the program lifecycle?

- Program delivery only.
- Across all the lifecycle phases.
- Program delivery and program closure.
- Program definition and program delivery.

What elements of the SAP story showcase the change maker's role?

Choose all that apply.

- The realization that all solutions rollouts are making critical changes in the customer's organizations.
- The maturing of the view of program management as a difference-making capability.
- Change management system.
- Maximum autonomy.

Which of the following is a critical change-making competency?

- Timeline focus.
- Scope-change management.
- Transformation skills.
- General management skills.

## 1.10 CHAMPIONING CHANGE

### Key Learnings

- Why is the program championship required?
- How can engagement strategies create program change buy-in?
  - Enable the program team
- Put servant leadership attributes in action to enable program teams
  - Cross-understanding other importance of that to embed in the team and across the program leaders
- Illustrate how the IOT implementation success is championing change-centric programs
  - How does technology help us mature our change muscle?
- Linkages to PMI Pulse of the Profession "Beyond Agility" to highlight critical future change capabilities
  - How to push ourselves past the agility that we need to imbed in our programs and projects

## 1.10.1 Engagement Strategies for Buy-In \_\_\_\_\_

Figure 1.22 summarizes a set of guidelines to help shape the creation of engagement strategies to achieve buy-in. The achievement of program changes highly correlates to the ability to engage the minds and the hearts of program stakeholders. Creativity in designing and applying the right mix of strategies will help increase the speed and chances for achieving buy-in. The following highlights a multitude of the best practices we could apply to achieve this buy-in.



**FIGURE 1.22** Engagement Strategies

- Illustrate communication clearly to the team
- Communications strategy and showing how we communicate differently as needed
- Interdependencies illustration as in the roadmap and schedule to show cross impacts
- Repeat the key messages often
- Revisiting the metrics to support taking out the limiting behaviors
- Use value and strategy-based metrics
- Tell me how I am measured, I will tell you how I will perform
- So much need to engage using our change management behaviors
- Clarifying roles and responsibilities
- Thinking what good looks like when it comes to communication

## 1.10.2 Servant–Leadership Attributes \_\_\_\_\_

- As illustrated by figure 1.23, being a servant leader is a huge differentiator for the success of the program team
- Inspires and energizes the team – takes obstacles out of the way
- Utilizes design thinking to empathize – better sensing and understanding of needs
- Addresses cultural transformation – program manager and the sponsor
- Practices emotional intelligence – ensuring maturing the elements
- Participates in change management efforts – rolling up the sleeves, showing by example
- Demonstrates great respect for program team – this motivates across program teams

**TIP**

The future of program managers success hinges on their ability to be of true service to their teams. Investing in your coaching and connecting skills is essential.



**FIGURE 1.23** The Servant Leader as a Difference Maker

Source: sgottschalk / 7 images.

### 1.10.3 IOT Implementation and Program Change

Given the complexity and the dynamic nature of programs discussed in detail across many of the parts of this chapter, it would be great to continue to capitalize on technology to experiment fast, move and adapt well, and retie the program approach quickly. The Internet of Things (IOT), value of which is highlighted in figure 1.24, is one such key enabler for this enhancing this program change handling capability.

- The IOT and access to data analytics change where we spend our time
- Great starting points to compare issues, risk and pain points
- Simulate and redo things without having massive amount of time and effort investment
- Rethinking using data to come up with better solutions
- When I have the proper nature and amount of data, this can help me have better handle on the program constraints and the elements of VUCA
- Responsive team that are better connected strategically around program risks
- Forecast resources and predict dynamic movements of parts of the programs
- Huge implications on the program success

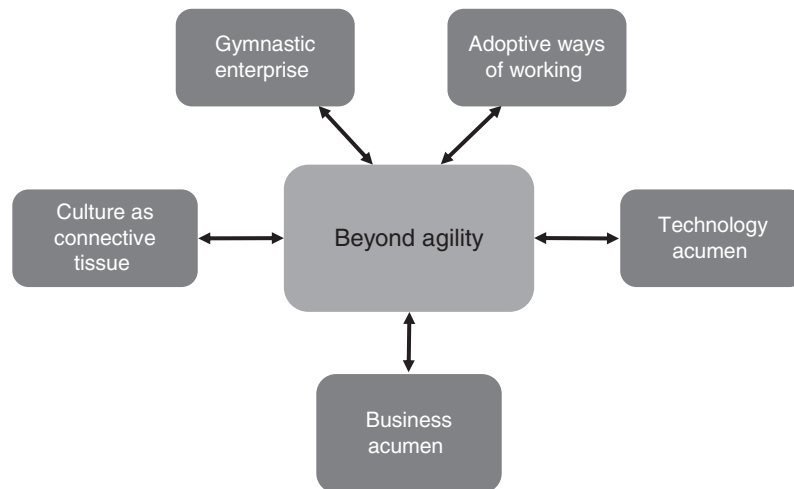


**FIGURE 1.24** IOT and Program Change

## 1.10.4 Beyond Agility

This PMI pulse of the profession study, as summarized by figure 1.25, highlights many critical attributes that are seen affect the future capabilities of program and project managers in their handling of change.

- Continuously adapting
- Addressing the ability of the enterprise to stretch itself and be adaptive
- Finding ways to stretch and tilt and to do whatever is needed
- Having a balanced technical and business acumen
- Going beyond the agile mindset and transparency needed for the future culture
- That is collaborating on steroids
- This allows the program managers to play their most suitable roles in connecting the teams, driving change, no matter how uncertain the conditions might be



**FIGURE 1.25** Going Beyond Agility

Source: Adapted from PMI 2021 Pulse of the Profession Report.

### Review Questions

*Parentheses ( ) are used for Multiple Choice, when one answer is correct. Brackets [ ] are used for Multiple Answer, when many answers are correct.*

How does servant-leadership contribute to the success of the program teams?

- Participating in change management efforts.
- Demonstrating respect for everyone.
- Inspiring team spirit and energizing the team.
- All of the above

How does the IOT contribute to program change success?

Choose all that apply.

- Fixing assumptions and constraints.
- Identification of the root causes of pain points.
- Better response to enterprise issues.
- Better tracking of VUCA factors.

What was highlighted in PMI's Pulse of the Profession study?

- Structured enterprise
- Stable way of working
- Program management acumen
- Culture as the connective tissue

