



Are your programs, projects, and operations aligned with organizational strategic objectives?

## Tailored Portfolio and Program Management implementation services

Establishing effective portfolio and program management to ensure project activities support your organizations strategic goals.

The pace of change in today's Business 4.0 world challenges organizations of all sizes. Strategic portfolio management informed by effective program and project management are crucial capabilities enabling organizations to achieve strategic goals and objectives.

Success depends on strengthening the capability and capacity of people. Change essentials has the experience to guide your organization to set up a successful resilient PMO process. We provide tailored plans to establish the most effective type of PMO based on the type and size of your organization. Change essentials specializes in resilience, strategic alignment, and engagement.

### Symptoms of organizations who have no/ineffective Portfolio and Program Management:





- 🐛 Unclear processes for demand management and project prioritization
- 🐛 High rates of project delays, overruns, or terminations
- 🐛 Lack the organizational agility to quickly adjust to evolving priorities and objectives
- 🐛 Ineffective resource management, for example: overallocation, underutilization, skill deficiencies
- 🐛 Inability to provide the data and analytics executives require to make critical decisions

**Accordinging to Gartner, "By 2025, 70% of digital investments will fail to deliver the expected business outcomes due to the absence of a strategic portfolio management (SPM) approach."**

### Strategic Portfolio Management positions organizations to:

- 🐛 Align work with strategic plans
- 🐛 Drive faster decision making
- 🐛 Ensure accurate, consistent business case development and assessment
- 🐛 Prioritize projects based on resources and their strategic value
- 🐛 Conduct what-if analysis of shifting resources and priorities
- 🐛 Gain greater visibility of business capabilities and infrastructure requirements
- 🐛 More effectively establish and support products and services

## Implementation Service

	Initiate	Establish Policies	Create Procedures	Conduct SMP Alignment	Launch
					
	<p>Meet with sponsor</p> <p>Review organizational documentation</p> <p>Summarize understanding of “as is” state</p>	<p>Develop project plan</p> <p>Draft policies</p>	<p>Develop procedures</p> <p>Develop training materials</p> <p>Conduct training</p>	<p>Facilitate portfolio review and alignment meetings</p> <p>Support “what if” analysis</p>	<p>Prepare communications</p> <p>Train key participants</p>
	<p>Provide organizational documentation</p> <p>Finalize engagement plan</p> <p>Announce initiative to establish Strategic Portfolio Management (SPM)</p>	<p>Establish policy review team</p> <p>Participate in the development and approval of policies</p>	<p>Participate in the development and approval of SPM procedures and templates</p> <p>Identify resources, tools, and central repository to support implementation</p>	<p>Assess current portfolio of projects utilizing SPM procedures</p> <p>Conduct demand management review of proposed projects</p> <p>Identify organizational constraints</p>	<p>Issue policy updates</p> <p>Communicate portfolio decisions and roadmap</p>
	<p>Participant awareness</p> <p>Assessment report of current state</p>	<p>Approved policies</p> <p>SPM framework</p>	<p>Established processes, procedures, and templates to facilitate SPM</p> <p>Trained SPM Alignment Team members</p>	<p>Prioritized ranked projects aligned to organization’s strategic plans</p> <p>Documented roadmap to adjust portfolio based on alignment decisions and constraints</p>	<p>Organizational awareness of SPM and initial portfolio alignment decisions</p>

### Format

Offered virtually or hybrid, leveraging survey and video conferencing tools to collect data, interview key personnel, collaborate, and deliver results. The initiation phase typically spans 1-2 months and serves to frame the scope and duration of the implementation and rollout.

### About Us

Change Essentials LLC team members have extensive experience establishing and running Program Management Offices and leveraging industry best practices while working with our clients to tailor the implementation. Change Essentials LLC is based in VA and registered as a Woman-Owned Small Business (WOSB).

**DUNS #: 079875780**

Change Essentials has additional service offerings that can be customized and bundled to enhance your organization’s ability to implement and sustain transformational change. To learn more, visit [changeessentials.com](https://changeessentials.com)

To speak to a Change Essentials Team Member about your organization’s portfolio, program, and project Management needs, call 703-216-1956 or contact [info@changeessentials.com](mailto:info@changeessentials.com).