

Project Excellence Preparation

A service to improve delivery of projects

**“ett verktyg för att förbättra ditt projekt
med hjälp av IPMA:s Project Excellence modell**



Svenskt Projektforum

The Swedish Project Management Association

Projektverktygsdagen 2017

30 maj Stockholm

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Member of the Board

Svenskt Projektforum



Svenskt Projektforum

Introduction of a new service for “Delivery Assurance” of projects & programmes

*“Svenskt Projektforum” (IPMA Sweden) has developed a new **service** based on the IPMA Project Excellence Baseline (PEB) in order to **facilitate regular and systematic improvement activities** for organisations to achieve better projects step by step focusing on most critical areas first.*

Benefits for different stakeholders

Stakeholder	Purpose	Products
IPMA	Spread of IPMA standards (PEB, OCB and ICB4) to gain more candidates for IPMA services and supporting MA business development & peer-to-peer co-operation. Gain more candidates	for 4LC, Achievement Awards, IPMA Delta and Project Excellence Awards
MAs	New business	Applications based on IPMA standards e.g. education, tools & templates, assessment
Companies	more effective & efficient projects	Self-assessment / assessment services & education (MA)
Consultants	new business	preparation and consulting services
Assessors	experience & professional development	Assessments through MA assessor pool



Project Excellence Preparation (PEP)

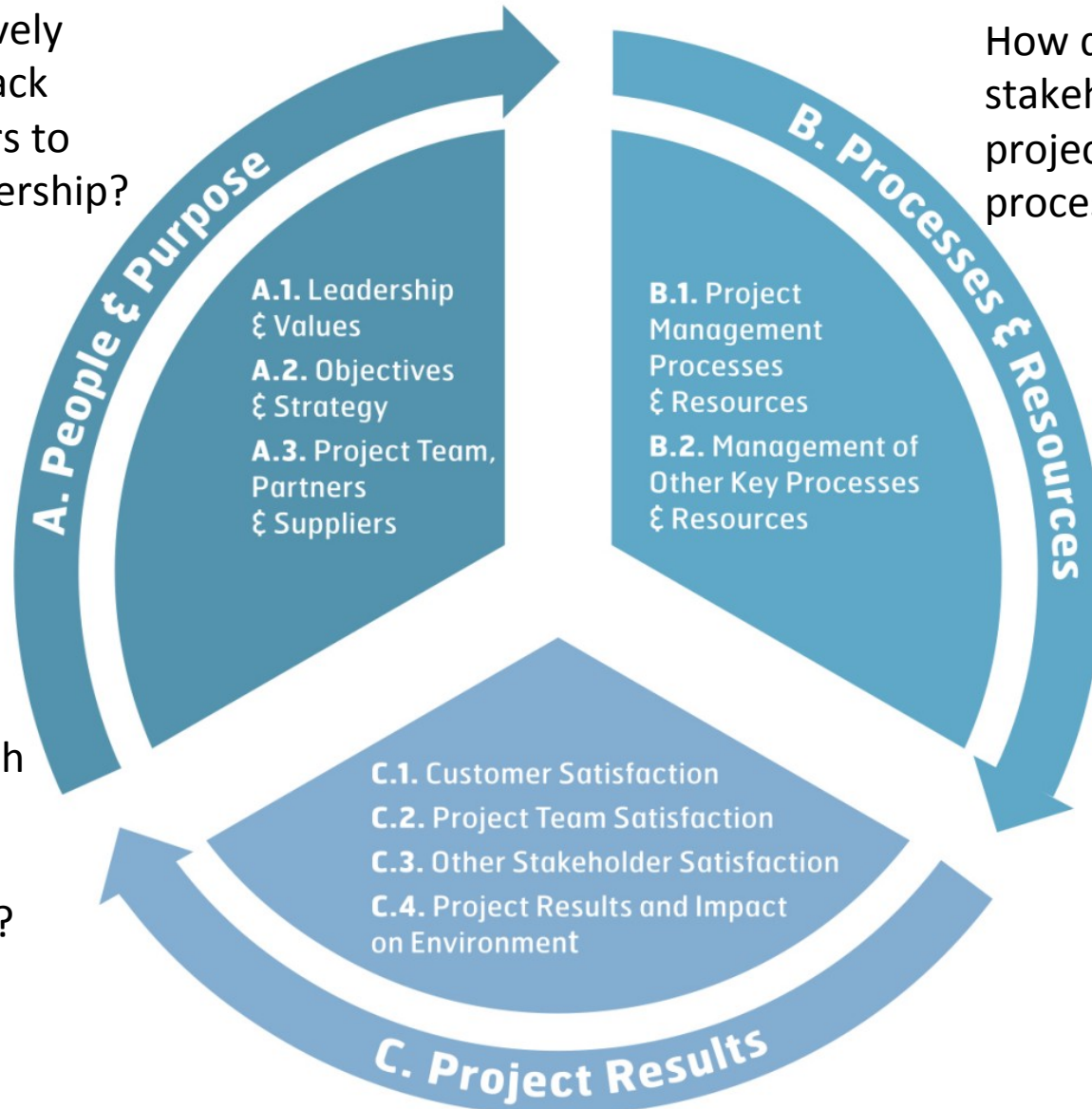
- PEP serves as a guide to organisations in “**delivery assurance**” and assessing the ability of their **on-going projects** and programmes to achieve excellent project results.
- PEP can also serve the purpose of being a **coaching instrument** for Project Managers as well as identification of needs for training.
- The main target audience are project stakeholders such as CxOs, senior managers, sponsors, project, programme and portfolio managers (including PMO and project staff).

The Project Excellence Model

Totalling 20 different perspectives and 200+ questions

How do I proactively search for feedback from stakeholders to improve my leadership?

How do we involve our stakeholders regarding project management processes?



How can we demonstrate customer satisfaction through written or verbal appreciations and recommendations?

Self Assessment **Project Excellence Preparation (PEP) Step 1-3 & Assessment (PEA) Step 4-5**

Step 1 PEP

Basic assessment
5 criteria x 3 questions

Step 2 PEP

Basic assessment
+ 5 criteria x 3 questions

Step 3 PEP

Basic assessment +
+ 10 criteria x 3 questions

Step 4 PEA

Limited assessment
20 criteria x 3 questions

Step 5 PEA

Full assessment
20 criteria x 10-15 questions

Developed &
currently piloted
in SWE

Coaching =
support
instrument



Feedback

Assessment =
control
instrument



Feedback

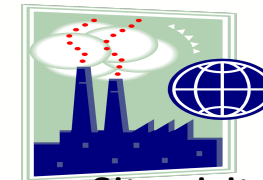


Feedback

External Evaluation



External Assessment



Site visit



Project Excellence in Sweden

status in May 2017



Next PEP training
12-14 Sept. 2017
English

PEP training

4 x 3 days in 2016
4 x 3 days in 2017

IPMA

MoU with Korea and
Russia/Sovnet, training in
Korea (June)



Int. trainings in
English as of
May 2017

Trained assessors

(45-2016 + 19 2017)
64 persons representing
all types of organisations

Project Governance

Project Governance
Preparation (PGP) ready
for piloting

First PGP training
24-26 October 2017
in Stockholm



Pilot phase II
Q2-Q3 2017-

Pilot phase I:
2016-Q1 2017

Pilot customers

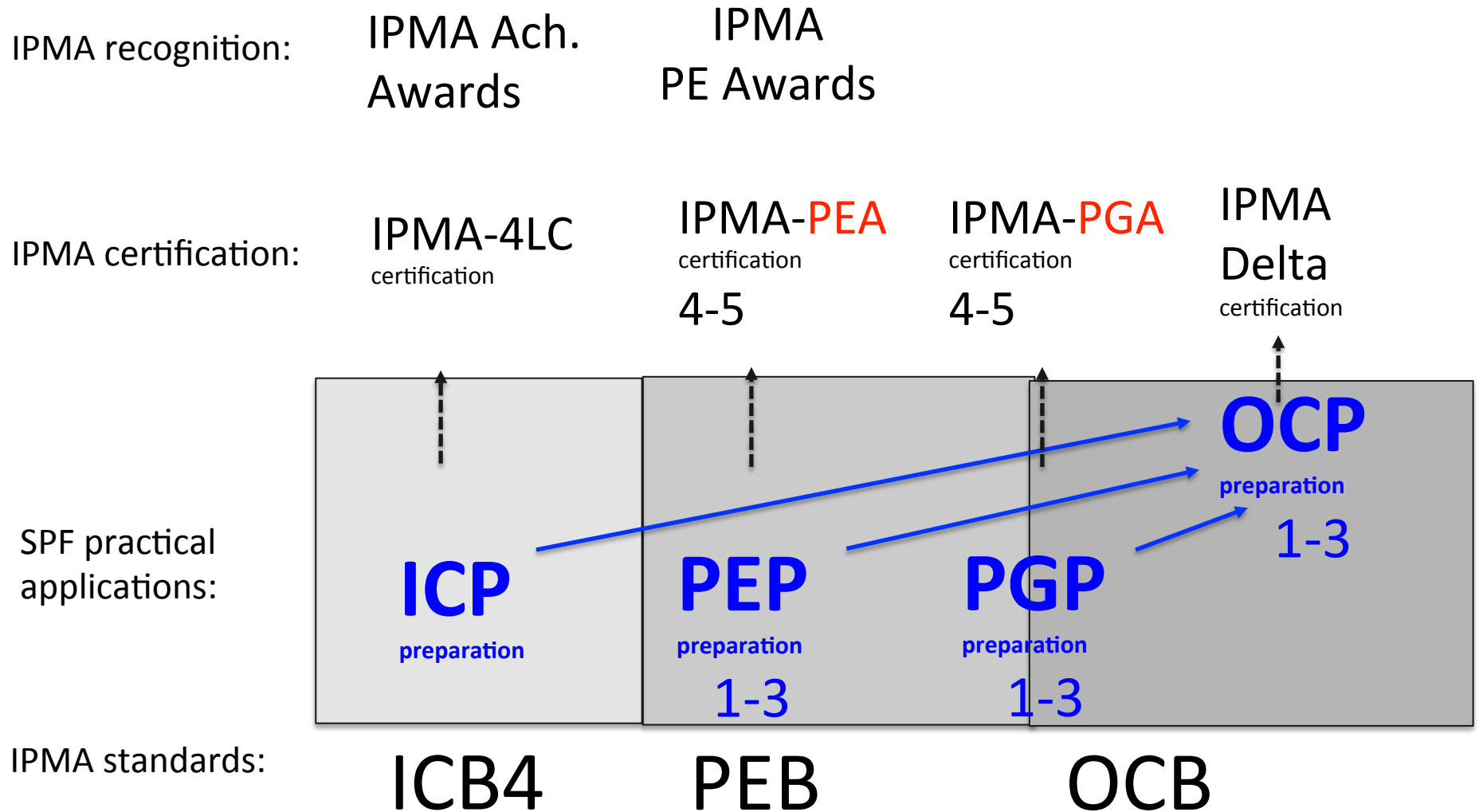
6 PEP Step 1

Individual Competence

Individual Competence
Preparation (ICP) under
development



CGP (Corporate Governance of Projects) based on IPMA standards (baselines)



Roadmap for practical applications based on IPMA standards (baselines)

IPMA standards:

ICB4

4LC
certification

ICP
preparation

PEB

PEP
preparation
1-3

PEA
assessment
4-5

OCB

PGP
preparation
1-3

PGA
assessment
4-5

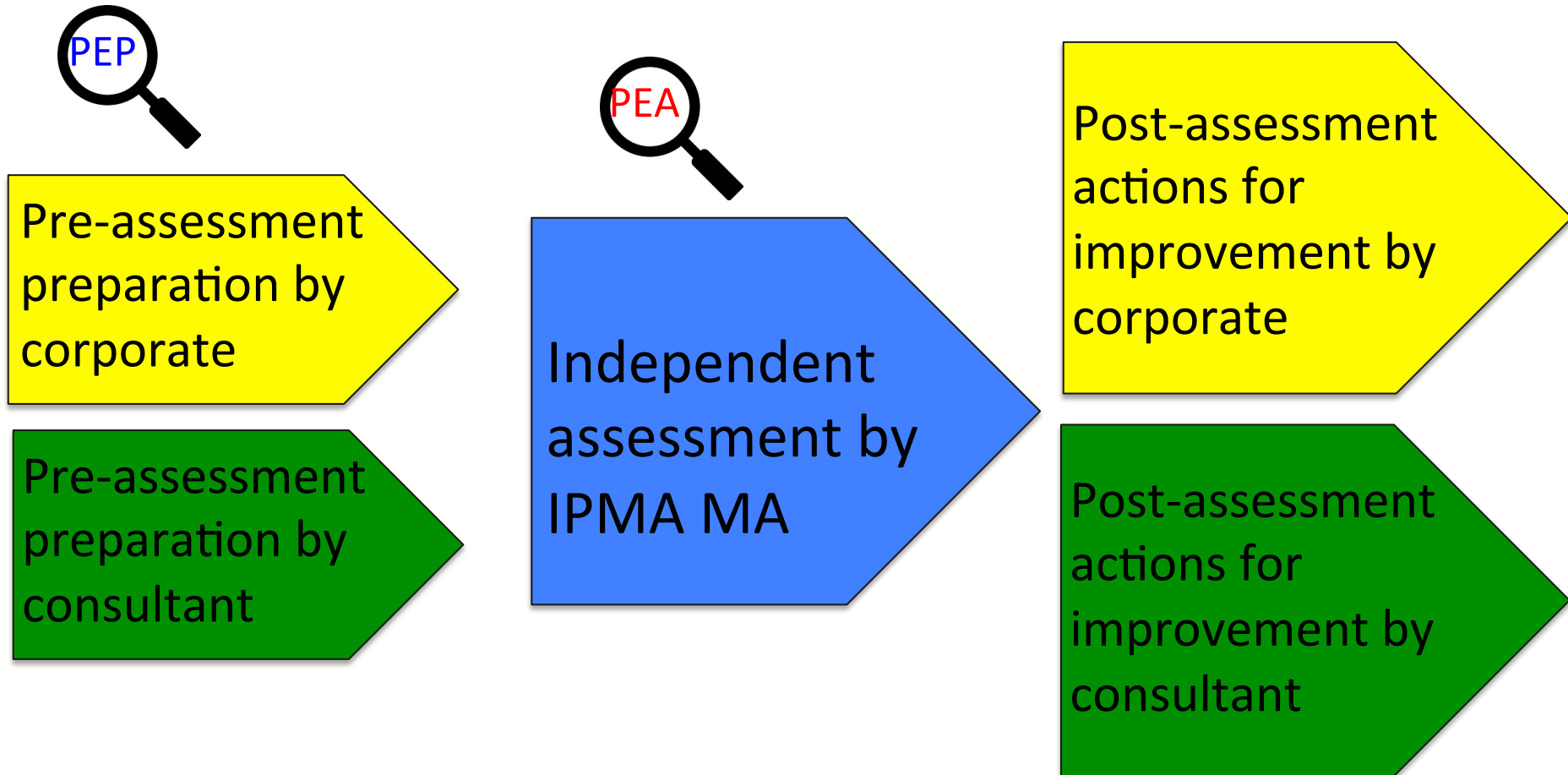
OCP
preparation
1-3

Delta
certification

2016 2017 2018 2019



Business Model: combining different stakeholders



Next steps

- Is this an interesting scope for your company?
- Appoint a dedicated responsible person
- Gathering more background information and establish a project excellence team
- Decide on next practical steps such as:
 - Training on Project Excellence Preparation (e.g. 12-14 September and 14-16 November) or Project Governance Preparation (24-26 October) in Stockholm
 - Marketing research and plan
 - Establish a business plan
 - Testing the market with pilot projects

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Definitions: SPF practical applications ^{1/2}

CGP = Corporate Governance of Projects is a concept for an organisational development journey for all staff focusing on delivery assurance for all project activities. CGP is the necessary part of organisational governance dealing with portfolios, programmes and projects that gives an organisation the required internal controls, while externally, it reassures stakeholders that the money being spent is justified.

ICP = Individual Competence Preparation (based on ICB4) is a method to identify strengths and improvement areas for an individual project manager in order to prepare for certification and / or facilitate professional development

PEP = Project Excellence Preparation (based on PEB) is a method to analyse projects and programmes step by step in order to enable and direct improvement activities to most critical areas. PEP is conducted in three steps starting with 15 questions on the 5 most critical areas (Step 1), continuing with an additional 15 questions on 5 2nd priority areas (Step 2), and finishing with 30 questions on remaining 10 areas.

PEA = Project Excellence Assessment (based on PEB) is a method for independent assessment of projects and programmes according to the IPMA project excellence model. PEA could either be done with limited scope i.e. 60 questions (Step 4) or full scope i.e. 200-300 questions (Step 5)

Definitions: SPF practical applications ^{2/2}

PGP = Project Governance Preparation (based on OCB) is a method to analyse project and programme governance step by step in order to enable and direct improvement activities to most critical area. PGP is conducted in three steps starting with 18 questions on the 6 most critical areas (Step 1), continuing with an additional 18 questions on 6 2nd priority areas (Step 2), and finishing with 18 questions on remaining 6 areas.

PGA = **Project Governance Assessment** (based on OCB)) is a method for independent assessment of PP&P management and governance according to the IPMA organisational competence model. **PGA** could either be done with limited scope i.e. circa 50 questions (Step 4) or full scope circa 100 questions (Step 5)

OCP = Organisational Competence Preparation in governing & managing projects, programmes and portfolios (PP&P) is a gradual preparation for OCA by applying ICP, PEP and PGP for PP&P in the organisation

IPMA Delta = **Assessment of Organisational Competence** in delivering value for the organisation based on the governing & managing of PP&P. IPMA Delta is an external assessment based on OCB, PEB and ICB4, verifying evidence for ICP, PEP & PGP, as well as giving the possibility to extending scope by adding new questions during a site visit

Definitions: IPMA baselines

ICB4 = Individual Competence Baseline version 4.0

4LC = IPMA four level certification for individuals

ICR4 = International Certification Regulations for 4LC

PEB = Project Excellence Baseline is an IPMA standard for project excellence

PEM = Project Excellence Model is a holistic model covering 20 perspectives of project excellence arranged into three main areas including A) People & Purpose, B) Processes & Resources and C) Project Results and Stakeholder Satisfaction

OCB = Organisational Competence Baseline is an IPMA standard to define organisational competence in managing projects, programmes and portfolios (PP&P)

IPMA Delta = service for assessing organisational competence in managing PP&P

PP&P = Projects, Programmes & Portfolios

Project, Programme & Portfolio = introduce **ISO definitions**