

Project Management Advisory Board

Deep Dive Study of Program Management

Purpose

The purpose of this study is twofold:

1. Understand how Saint Louis companies are managing programs
2. Study the maturity level of program management practices in the Saint Louis area

Deliverable:

Responses from all participating companies will be analyzed, summarized and documented in a study packet to be reviewed with the advisory board.

1. A comparison of skills and key competencies for project and program managers
2. A sample Program Management Maturity Model
 - Our survey was created based on this model
 - For more information research documents are referenced
3. Survey Report
4. Key Findings document is a summary of the responses provided by 11 companies from 6 industries.

For the purposes of this study, Program Management has been defined as “a group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually. Programs may contain related work outside of the scope of the discrete projects in the program.”

Comparison: Project Management vs. Program Management

| Source: PMBOK | Projects | Programs |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| SCOPE | Projects have defined objectives. Scope is progressively elaborated throughout the project life cycle. | Programs have a larger scope and provide more significant benefits. |
| CHANGE | Project managers expect change and implement processes to keep changes managed and controlled. | The program manager must expect change from both inside and outside of the program and be prepared to manage it. |
| PLANNING | Project managers progressively elaborate high-level information into detailed plans throughout the project life cycle. | Program managers develop the overall program plan and create high-level plans to guide detailed planning at the component level. |
| MANAGEMENT | Project managers manage the project team to meet the project objectives. | Program manager manages program staff and the project managers; they provide vision and overall leadership |
| SUCCESS | Success is measured by product and project quality, timeliness, budget compliance, and degree of customer satisfaction | Success is measured by the degree to which the program satisfies the needs and benefits for which it was undertaken |
| MONITORING | Project managers monitor and control the work of producing the products, services or results that the project was undertaken to produce. | Program managers monitor the progress of program components to ensure the overall goals, schedules, budget, and benefits of the program will be met. |

| Source: PMI | PMP Requirements | PgMP Requirements |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project Role | Leads and directs project teams | Achieves an organizational objective through defining and overseeing project and resources |
| Eligibility Requirements | Secondary diploma (high school or equivalent) 5 years project management experience with a at least 7500 hours spent leading and directing project tasks and 35 hours project management education. OR Four-year degree (bachelors degree or equivalent) 3 years project management experience with 4500 hours spent leading and directing project tasks and 35 hours of project management education | Secondary diploma (high school or equivalent) 4 years project management experience 7 years program management experience OR Four-year degree (bachelors degree or equivalent) 4 years project management experience 4 years program management experience |
| Steps to Obtaining Credential | Application process + multiple choice exam | 3 evaluations- application panel review + multiple choice exam + multi-rater assessment |
| Exam Information | 4 hours; 200 questions | 4 hours; 170 questions |
| Fees | US \$405 PMI member US \$555 non member | US \$1500 PMI member US\$1800 non member |
| Credential Maintenance Cycle and Requirements | 3 years; 60 PDU's | 3 years; 60 PDU's |

| Source: Research* | Project / Senior Project Manager Skills | Program Manager Skills |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Education | Bachelor's Degree or equivalent combination of education and experience ** | Bachelor's degree or equivalent combination of education and experience. Master's degree strongly preferred ** |
| Certifications | Project Management Certification (PMP) or degree preferred | Project Management Certification or Degree required |
| Years Experience | 3-5 years Project Management / 5-7 years + 3 years managing complex projects; MBA Preferred | 10+ years experience of overall project management and leadership of teams required; 5+ years of Program Management preferred. |
| Competencies *** | Financial management skills Good communication (verbal and written) and interpersonal skills Excellent business management and developmental skills Leadership qualities Efficient team management skills Ability to resolve conflicting situations Effective problem solving skills | Management skills Strategic planning Public speaking / Presentation skills "Critical" thinking / decision making skills Negotiation skills / Influencing Self motivated Organizational Agility |

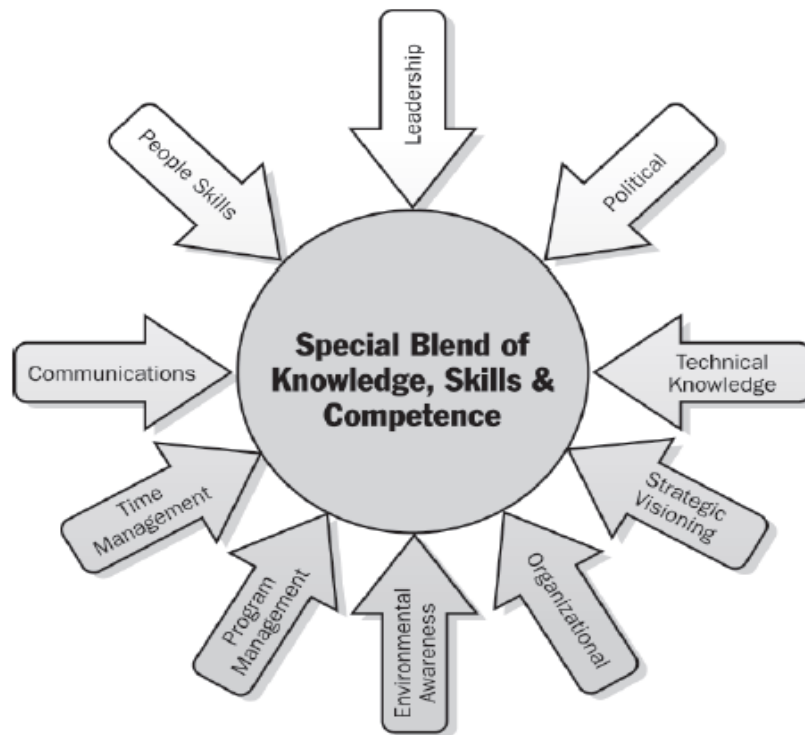
* Reviewed 18 job descriptions from various companies and interview with a PMI Certified PgMP.

** Degree related to specific industry

*** Competencies for Program Manager = △

Key Competencies of Program Managers

| Source: PMI Program Standards* | Key Competencies |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Communication | Most important competence is communication. The program manager must have strong communication skills to deal with various team members, sponsor, managing directors, customers, vendors, senior management and other program stakeholders. Added complexity due to the fact that multiple projects generally mean "multiples" of each of these roles; and a varying degree of commitment to the program. |
| Leadership | Leadership skills are critical and more complex with programs. The Program manger must establish program direction, ensure program requirements are met, make program decisions and resolve conflicts and issues. They are required to lead managers (project managers and functional managers) adding a level of complexity and requires a variety of excellent leadership skills. |
| Strategic Planning | Strategic visioning and planning skills to align program goals and benefits with the long-term goals of the organization. While the project managers lead their components, it is the program manager's responsibility to ensure alignment of the individual plans with the program goals and benefits. |
| Politically Savvy | Political relationships need to be observed and fostered within a program. Understanding the political climate and temperature of a program is important in achieving a positive relationship, and setting the ground work for when the benefits from the program will be transitioned to the supporting organizations. |
| Enterprise View | Program can be impacted by environmental / organizational factors as well as external factors. It is key that a program manager can "keep their eye" on the enterprise environment to ensure all factors are considered in defining their program management approach, and impacts to the program are understood. |



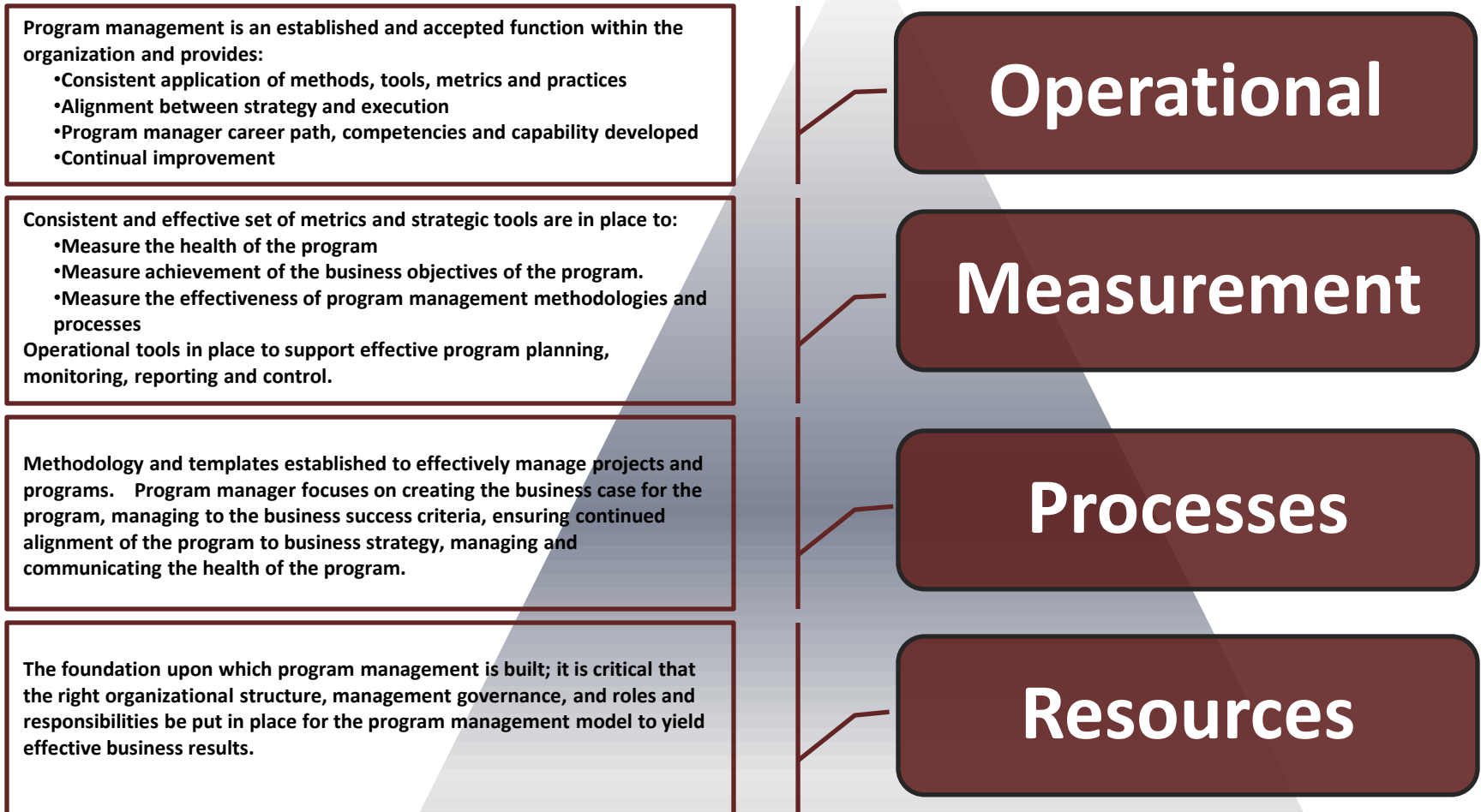
* PMI " The Standard For Program Management - Second Edition" pages 42-45

Summary

Program Management focuses on the inter-dependencies between related projects and ongoing work components. This means embracing change where necessary, and providing insight and leadership. The appropriate leadership style is one that manages relationships, stakeholder politics, and conflict resolution.

Program Managers therefore must carry out high-level planning (big picture view of effects) to provide guidance to all projects, and they need the critical ability of managing relationships.

Program Management Maturity Model



Resources:

- PM World Today - The Program Management Maturity Model™ A Framework for Change
- Gartner - Program and Portfolio Management Maturity Model
- PMI - Program Management Overcoming Obstacles to Success

Note: Survey questions aligned with this model

Summary of Key Findings

Of a Survey on the Topic of Program Management by the SIU-Edwardsville Project Management Advisors Board

In February/March 2010, the SIU-E Project Management Advisors Board conducted a survey of member companies on the topic of Program Management in their organizations. Eleven (11) companies responded.

Findings from these surveys are summarized below:

General

- ◆ More than half of the companies have a formal program management methodology.
- ◆ Most companies (90%) have some type of a project prioritization process that includes programs and project as a collective group.
- ◆ There was a fairly even spread of program management maturity levels across the respondents – from “as needed” to “established” to “accepted”.

Level 1 - Resource/Organization

- ◆ Most companies do not have a formal Program Manager position - it tends to be filled, as needed, by senior project managers.
- ◆ Most (80%) rated their program managers at the initial/improving maturity level.
- ◆ Half of companies assigned teams as the project level, with team members more often reporting to their line supervisors (matrix)
- ◆ More than half of respondents indicated their programs managers primarily interact with business area leaders or the executive sponsor.
- ◆ Most (65%) don't define their programs organizational breakdown structure at the program level. They typically manage at the project level.

Level 2 - Processes

- ◆ Program schedules were architected in a wide variety across the responding companies - from all inclusive master program schedules that included all projects to others who only managed by project schedules
- ◆ Most companies (60%) reported an initial/improving maturity level for developing program schedules.
- ◆ A majority of companies (73%) had a risk management process in place that was managed at the project level with critical risks managed at the program level. There was a somewhat even spread among companies in rating their maturity levels at risk management.
- ◆ Most respondents (64%) managed issues at the project level, with critical issues or those requiring escalation being managed at the program level. The maturity level in issues management was mostly “improving/initial” as compared to “established/accepted”.
- ◆ Most companies have program status reporting (80%); many (55%) use a roll-up from the various projects.
- ◆ Change management for programs varied somewhat evenly from only being controlled at the project level to being controlled at the program level.
- ◆ Most companies managed budgets at the project level with rollups to the program level.

Level 3 - Measurement

- ◆ 90% of companies have program level health status measurement; half use red/yellow green indicators and factor input from each PM in deciding what the program status should be.
- ◆ The maturity level for measuring program status was evenly spread from initial to established.
- ◆ Most companies (55%) don't have a program performance scorecard.

Summary of Key Findings
Of a Survey on the Topic of Program Management by the
SIU-Edwardsville Project Management Advisors Board

- ◆ Most (80%) rated their maturity in measuring program performance as either initial or improving.
- ◆ 90% of companies had some form of a quality management program – either at the project level or program level – only 10% managed it at the program level only.
- ◆ Quality management maturity was somewhat evenly spread.
- ◆ Just over half of the companies track ROI after program closure.

Level 4 – Operational

- ◆ 55% of companies use a program charter to initiate a program.
- ◆ Most companies (55%) do not have an enterprise level program management methodology.
- ◆ Most (64%) don't have a formal program management methodology
- ◆ 64% indicated their program management process is at the “initial/improving” maturity level.
- ◆ 90% indicated their programs are aligned with corporate strategies.
- ◆ Most companies (64%) do not have a career path for program managers.
- ◆ There were mixed results in assessing the maturity of their program managers with a slight tendency toward initial/improving.
- ◆ Most companies agreed that Program Managers in their organizations are typically experienced or senior level project managers.

Program Management Practices Survey Results

1. Survey Information: Conducted February/March 2010 11 Complete Responses

2. Industry:

| | | |
|--------------|-----------|-------------|
| Aerospace | 1 | 9% |
| Consulting | 2 | 18% |
| Financial | 3 | 27% |
| Healthcare | 2 | 18% |
| Technology | 1 | 9% |
| Utilities | 2 | 18% |
| Total | 11 | 100% |

General Questions

4. Does your company have a formal program management methodology?

| | | |
|--------------|-----------|-------------|
| Yes | 7 | 64% |
| No | 4 | 36% |
| Total | 11 | 100% |

5. Who creates the program and/or remains accountable for realizing its benefits?

| | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------|
| The Executive Committee creates programs and is accountable for results | 2 | 18% |
| Individual business units create programs and is accountable for results | 3 | 27% |
| Recommended by organizations which support business units (example IT/IS) who creates the program and is accountable for results | 1 | 9% |
| No formal process in place. | 2 | 18% |
| Other, please "briefly" explain | 3 | 27% |
| 1. A combination of the first 3 | | |
| 2. There is a Corporate Oversight group that created the Program. Executive Committee has ultimate accountability for their individual business lines. | | |
| 3. Programs are external in response to customer Request for Proposal (RFP) | | |
| Total | 11 | 100% |

6. Does your company have an approval and prioritization process for programs?

| | | |
|------------------------------------------------------------------------------------------------------------|-----------|-------------|
| Yes, programs approved and prioritized by an executive committee independent of projects. | 3 | 27% |
| Yes, programs and projects are collectively approved and prioritized as one list by an executive committee | 3 | 27% |
| Yes, programs are approved and prioritized within each business unit | 1 | 9% |
| No formal process for approval and prioritization | 3 | 27% |
| Other, please "briefly" explain | 1 | 9% |
| Combination of 1 and 2 dependent on value | | |
| Total | 11 | 100% |

7. How does your company establish the scope of a program?

| | | |
|---------------------------------------------------------------------------------------------------------------|-----------|-------------|
| Formal Program Business Case with ROI required with high level program structure (projects) | 5 | 45% |
| Same as projects, documented during initiation of the program as a scope statement and business requirements. | 4 | 36% |
| When we have multiple "related" projects, we combine them into a program. | 1 | 9% |
| No formal documented scope at the program level - established for each project in the program | 1 | 9% |
| Total | 11 | 100% |

| 8. How would you rate the maturity level of your overall program management methodology? | | |
|-------------------------------------------------------------------------------------------------|-----------|-------------|
| Initial - Ad-hoc as needed | 3 | 27% |
| Improving - Baseline processes in place | 2 | 18% |
| Established - Fully implemented methodology | 2 | 18% |
| Accepted - Enterprise wide adoption | 4 | 36% |
| Total | 11 | 100% |

Level 1 - Resources / Organization

| 9. How is the role of program manager currently established in your company? | | |
|-------------------------------------------------------------------------------------|-----------|-------------|
| We have a formal Program Manager position | 4 | 36% |
| Program manager role filled by senior Project Managers. | 3 | 27% |
| Program manager role filled by Product Managers or Functional Team Leads | 2 | 18% |
| Ad-hoc - depends on the situation | 0 | 0% |
| Other, please "briefly" explain | 2 | 18% |
| 1. Combination of 1 and 2 depending on size and scope | | |
| 2. Filled by Officers or Senior Managers | | |
| Total | 11 | 100% |

| 10. How would you rate the maturity level of the program manager role in your company? | | |
|-----------------------------------------------------------------------------------------------|-----------|-------------|
| Initial - Ad-hoc as needed | 3 | 27% |
| Improving - Baseline processes in place | 4 | 36% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 3 | 27% |
| Total | 11 | 100% |

| 11. How are resources assigned to programs in your company? | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------|
| All team members are assigned as dedicated resources to the program - matrixed | 2 | 18% |
| All team members are assigned as dedicated resources to the program and report into the program manager. | 0 | 0% |
| Program mgr assigned at program level - all team members are assigned at the project level - matrixed reporting into departments. | 4 | 36% |
| Program mgr assigned at program level - all team members are assigned at the project level - report into project managers. | 3 | 27% |
| Other, please "briefly" explain | 2 | 18% |
| 1. Resource requirements part of bid. Once won, we acquire resources both internally and externally. | | |
| 2. Some combination of all. Dependent on specific requirements of the program. Some required dedicated team members some can be accomplished using matrixed support from across the organization. | | |
| Total | 11 | 100% |

| 12. How would you rate the maturity level of resources assignment in your company? | | |
|-------------------------------------------------------------------------------------------|-----------|-------------|
| Initial - Ad-hoc as needed | 0 | 0% |
| Improving - Baseline processes in place | 5 | 45% |
| Established - Fully implemented methodology | 3 | 27% |
| Accepted - Enterprise wide adoption | 3 | 27% |
| Total | 11 | 100% |

| 13. Who are the key stakeholders that a program manager in your company interacts with on a daily basis? | | |
|-----------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------|
| Executive sponsor, functional business area leaders, project managers | 2 | 18% |
| Functional business area leaders, business functional areas, project managers | 4 | 36% |
| Business functional areas, project managers and project teams | 1 | 9% |
| All of the above | 4 | 36% |
| Total | 11 | 100% |
| 14. How would you rate the maturity level of program manager interaction with key stakeholders on a daily basis in your company? | | |
| Initial - Ad-hoc as needed | 0 | 0% |
| Improving - Baseline processes in place | 5 | 45% |
| Established - Fully implemented methodology | 3 | 27% |
| Accepted - Enterprise wide adoption | 3 | 27% |
| Total | 11 | 100% |
| 15. Do you use an accountability diagram (such as a RACI) at the program level to ensure all team members know their role? | | |
| Yes, we establish full roles, responsibilities and communications at the program level | 4 | 36% |
| Yes, this is done at the project level and rolled up to the program level | 5 | 45% |
| Nothing formal, the program manager works with each project manager to establish roles and responsibilities | 2 | 18% |
| No, we do not have a formal process to establish roles and responsibilities at the program level. | 0 | 0% |
| Total | 11 | 100% |
| 16. How would you rate the maturity level of an accountability diagram in your company? | | |
| Initial - Ad-hoc as needed | 2 | 18% |
| Improving - Baseline processes in place | 4 | 36% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 4 | 36% |
| Total | 11 | 100% |
| 17. Do you define the organizational breakdown structure of each program in your company? | | |
| Yes, but not in the form of an org chart, we use the team resource rolled up to the program level. | 7 | 64% |
| No, programs managed within one organization have an org structure - other programs are ad-hoc. | 2 | 18% |
| No, we do not have a formal process for establishing the program resource hierarchy. | 2 | 18% |
| Total | 11 | 100% |
| 18. How would you rate the maturity level of program organizational definition in your company? | | |
| Initial - Ad-hoc as needed | 2 | 20% |
| Improving - Baseline processes in place | 3 | 30% |
| Established - Fully implemented methodology | 1 | 10% |
| Accepted - Enterprise wide adoption | 4 | 40% |
| Total | 10 | 100% |

Level 2 - Processes

| 19. How are program schedules developed and managed in your company? | | |
|---------------------------------------------------------------------------------------------------|-----------|-------------|
| Program level master schedule includes all program and project tasks and milestones | 3 | 27% |
| Program level master schedule includes all program and project milestones | 3 | 27% |
| Program level master scheduled of program and project key milestones only | 2 | 18% |
| Project level schedules only | 3 | 27% |
| Total | 11 | 100% |
| 20. How would you rate the maturity level of program schedule development in your company? | | |
| Initial - Ad-hoc as needed | 2 | 18% |
| Improving - Baseline processes in place | 5 | 45% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 3 | 27% |
| Total | 11 | 100% |

| 21. How is risk assessment and risk management completed for programs in your company? | | |
|-------------------------------------------------------------------------------------------------------------|-----------|-------------|
| Risk assessment done at project and program levels - managed independently | 2 | 18% |
| Risk assessment done at project and program level - managed at the program level | 1 | 9% |
| Risk assessment done at the project level - only critical risks are managed at the program level | 8 | 73% |
| Risk assessment and risk management is done at the project level only | 0 | 0% |
| Total | 11 | 100% |
| 22. How would you rate the maturity level of program risk assessment and management in your company? | | |
| Initial - Ad-hoc as needed | 1 | 9% |
| Improving - Baseline processes in place | 3 | 27% |
| Established - Fully implemented methodology | 5 | 45% |
| Accepted - Enterprise wide adoption | 2 | 18% |
| Total | 11 | 100% |

| 23. How are program issues managed in your company? | | |
|-------------------------------------------------------------------------------------------------------|-----------|-------------|
| Issue management is done at project and program levels independently | 1 | 9% |
| Issue management is done at the program level | 0 | 0% |
| Issue management is done at the project level - only critical issues are managed at the program level | 7 | 64% |
| Issue management is done at the project level - program serves as an escalation point | 3 | 27% |
| Total | 11 | 100% |
| 24. How would you rate the maturity level of program issue management in your company? | | |
| Initial - Ad-hoc as needed | 1 | 9% |
| Improving - Baseline processes in place | 5 | 45% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 4 | 36% |
| Total | 11 | 100% |

| 25. How do you report program status in your company? | | |
|--------------------------------------------------------------------------------------------|---|-----|
| Executive summary status reporting at the program level | 2 | 18% |
| Status reporting is done at the program level independent of project team status reporting | 1 | 9% |
| Status reporting is done at the program level as a roll-up of project status | 6 | 55% |
| No program status reporting is created - project level only | 1 | 9% |
| Other, please "briefly" explain | 1 | 9% |
| Formal reporting to customer, internal program status review and joint in-progress reviews | | |

| Total | 11 | 100% |
|-----------------------------------------------------------------------------------------------|----|------|
| 26. How would you rate the maturity level of program status reporting in your company? | | |
| Initial - Ad-hoc as needed | 3 | 27% |
| Improving - Baseline processes in place | 3 | 27% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 4 | 36% |
| Total | 11 | 100% |

| 27. How do you document and manage project change requests in your company? | | |
|--------------------------------------------------------------------------------------------|----|------|
| Change management is controlled at the program level (scope) and the project level (scope) | 2 | 18% |
| Change management is controlled at the project level (scope) with a roll-up to the program | 3 | 27% |
| Change management is controlled at the project level with program level as an escalation | 3 | 27% |
| Change management is controlled at the project level only | 3 | 27% |
| Total | 11 | 100% |

| 28. How would you rate the maturity level of program change management in your company? | | |
|------------------------------------------------------------------------------------------------|----|------|
| Initial - Ad-hoc as needed | 2 | 18% |
| Improving - Baseline processes in place | 4 | 36% |
| Established - Fully implemented methodology | 3 | 27% |
| Accepted - Enterprise wide adoption | 2 | 18% |
| Total | 11 | 100% |

| 29. How do you manage program budgets in your company? | | |
|-----------------------------------------------------------------------------|----|------|
| Budget management is done at the program level | 3 | 27% |
| Budget management is done at the project level only - no program budget | 1 | 9% |
| Budget management is done at the project level and rolled up to the program | 6 | 55% |
| We do not have project or program budgets | 1 | 9% |
| Total | 11 | 100% |

| 30. How would you rate the maturity level of program budget management in your company? | | |
|------------------------------------------------------------------------------------------------|----|------|
| Initial - Ad-hoc as needed | 1 | 9% |
| Improving - Baseline processes in place | 3 | 27% |
| Established - Fully implemented methodology | 2 | 18% |
| Accepted - Enterprise wide adoption | 5 | 45% |
| Total | 11 | 100% |

Level 3 - Measurement

| 31. How do you report on the overall health of programs in your company? | | |
|------------------------------------------------------------------------------------------------------------------------------------------------|---|-----|
| Factor (example Red-Yellow-Green or Critical Milestone completion) at the program level independent of project status | 0 | 0% |
| Factor (example Red-Yellow-Green or Critical Milestone completion) at the program level - program and project managers agree to program status | 6 | 55% |
| Each project is assigned a value (how critical it is to the project) and a factor is calculated | 1 | 9% |
| Factor (example Red-Yellow-Green or Critical Milestone completion) at project level only | 3 | 27% |
| No process in place | 0 | 0% |
| Other, please "briefly" explain | 1 | 9% |

Wide range of metrics dependent on program type, metrics tailored to program requirements and performance

| Total | 11 | 100% |
|-----------------------------------------------------------------------------------------------|----|------|
| 32. How would you rate the maturity level of program health reporting in your company? | | |
| Initial - Ad-hoc as needed | 3 | 27% |
| Improving - Baseline processes in place | 2 | 18% |
| Established - Fully implemented methodology | 3 | 27% |
| Accepted - Enterprise wide adoption | 3 | 27% |
| Total | 11 | 100% |

| 33. Do you have a program performance matrix / scorecard in your company? | | |
|----------------------------------------------------------------------------------|----|------|
| Yes | 5 | 45% |
| No | 6 | 55% |
| Total | 11 | 100% |

| 34. How would you rate the maturity level of program performance measurement in your company? | | |
|------------------------------------------------------------------------------------------------------|----|------|
| Initial - Ad-hoc as needed | 5 | 45% |
| Improving - Baseline processes in place | 4 | 36% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 1 | 9% |
| Total | 11 | 100% |

| 35. Do you have a formal program quality management process in your company? | | |
|--------------------------------------------------------------------------------------------------------------------------------------------|----|------|
| Quality management plans and activities completed at the program level only. | 1 | 9% |
| Quality management plans and activities completed at the project level only. | 4 | 36% |
| Quality management plans completed at the project level and roll up to program level. | 5 | 45% |
| Quality mgt plans and activities "split" (example: audits and corrective actions at program level but inspection testing at project level. | 0 | 0% |
| No formal quality management processes | 1 | 9% |
| Total | 11 | 100% |

| 36. How would you rate the maturity level of program quality management in your company? | | |
|-------------------------------------------------------------------------------------------------|----|------|
| Initial - Ad-hoc as needed | 2 | 18% |
| Improving - Baseline processes in place | 4 | 36% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 4 | 36% |
| Total | 11 | 100% |

| 37. Do you have a program closure process in your company? | | |
|------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------|
| Project closure is executed as each project completes - formal program closure completed independent of project data | 3 | 27% |
| Project closure is executed as each project completes -formal program closure completed by reviewing and summarizing all project closure data. | 5 | 45% |
| Project closure only - program is closed when all projects are completed but no formal closure process. | 2 | 18% |
| Programs remain open and are ongoing - new projects are approved under the program each planning cycle | 1 | 9% |
| Total | 11 | 100% |

| 38. How would you rate the maturity level of the program closure process in your company? | | |
|--------------------------------------------------------------------------------------------------|-----------|-------------|
| Initial - Ad-hoc as needed | 1 | 9% |
| Improving - Baseline processes in place | 5 | 45% |
| Established - Fully implemented methodology | 3 | 27% |
| Accepted - Enterprise wide adoption | 2 | 18% |
| Total | 11 | 100% |

| 39. Do you track ROI results post deployment / closure of a program? | | |
|-----------------------------------------------------------------------------|-----------|-------------|
| Yes | 6 | 55% |
| No | 5 | 45% |
| Total | 11 | 100% |

| 40. How would you rate the maturity level of the program ROI results tracking in your company? | | |
|-------------------------------------------------------------------------------------------------------|-----------|-------------|
| Initial - Ad-hoc as needed | 4 | 36% |
| Improving - Baseline processes in place | 5 | 45% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 1 | 9% |
| Total | 11 | 100% |

Level 4 - Operational

| 41. Do you have a formal program initiation process which includes ROI and documenting the Vision, Scope and project breakdown in your company? | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------|
| Yes, we use a program charter to document ROI, Vision and Scope and projects to be worked under the program | 6 | 55% |
| No, we have a formal initiation process which includes Vision and Scope but not ROI or projects | 1 | 9% |
| No, we have a formal initiation process which include Vision and Scope and ROI but not projects | 1 | 9% |
| We do not have a formal process for initiation of programs | 2 | 18% |
| Other, please "briefly" explain | 1 | 9% |
| Vision and scope defined by the customer | | |
| Total | 11 | 100% |

| 42. How would you rate the maturity level of the program initiation process in your company? | | |
|-----------------------------------------------------------------------------------------------------|-----------|-------------|
| Initial - Ad-hoc as needed | 3 | 27% |
| Improving - Baseline processes in place | 3 | 27% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 4 | 36% |
| Total | 11 | 100% |

| 43. Do you have a formal program management methodology established at the enterprise level in your organization? | | |
|---------------------------------------------------------------------------------------------------------------------------------|----|------|
| Yes | 5 | 45% |
| No | 6 | 55% |
| Total | 11 | 100% |
| 44. How would you rate the maturity level of the program management methodology in your company? | | |
| Initial - Ad-hoc as needed | 5 | 45% |
| Improving - Baseline processes in place | 2 | 18% |
| Established - Fully implemented methodology | 1 | 9% |
| Accepted - Enterprise wide adoption | 3 | 27% |
| Total | 11 | 100% |
| 45. Do you have a formal program management methodology which is accepted and practiced at the enterprise level? | | |
| Yes | 4 | 36% |
| No | 7 | 64% |
| Total | 11 | 100% |
| 46. How would you rate the maturity level of the program management methodology acceptance and practice in your company? | | |
| Initial - Ad-hoc as needed | 5 | 45% |
| Improving - Baseline processes in place | 2 | 18% |
| Established - Fully implemented methodology | 2 | 18% |
| Accepted - Enterprise wide adoption | 2 | 18% |
| Total | 11 | 100% |
| 47. Do all programs align to strategic objectives in your company? | | |
| Yes | 10 | 91% |
| No | 1 | 9% |
| Total | 11 | 100% |
| 48. How would you rate the maturity level of the program strategic alignment in your company? | | |
| Initial - Ad-hoc as needed | 0 | 0% |
| Improving - Baseline processes in place | 3 | 27% |
| Established - Fully implemented methodology | 4 | 36% |
| Accepted - Enterprise wide adoption | 4 | 36% |
| Total | 11 | 100% |
| 49. Has the role of the program manager been established across the enterprise and does it offer a career path? | | |
| Yes | 4 | 36% |
| No | 7 | 64% |
| Total | 11 | 100% |
| 50. How would you rate the maturity level of the position of and career path for program manager in your company? | | |
| Initial - Ad-hoc as needed | 4 | 36% |
| Improving - Baseline processes in place | 3 | 27% |
| Established - Fully implemented methodology | 2 | 18% |
| Accepted - Enterprise wide adoption | 2 | 18% |
| Other, please "briefly" explain | 0 | 0% |
| Total | 11 | 100% |

51. Please comment briefly on the challenges your company has experienced in adopting program management disciplines.

1. We are focused on Project Managers. As common work comes up we set up programs under the same PM. This leads to a less formal Program Manager position.
2. (1) Embracing the concept of an enterprise Program Manager has been difficult; there is a perceived "lack of control" if a Program Manager does not report into a specific organization. 2) Developing a Program lifecycle to complement the Program Management methodology.
3. Each business line wants to add "specific" sections for their area.
4. Resource management is the trick to success for us. We have multiple layers and multiple PMO's that have different methodologies that are just now coming together under common standards.
5. I don't see any major challenges, however continuing to refine, communicate, and execute the process will our focus in the near term.
6. There is a clear need for program management methodology and discipline at Jones, yet not all areas (in executive & functional levels) yet understand what the benefits, and how to create an organization / roles / etc.
7. Separate business units graded separately for profit loss. Creates some internal road blocks that must be overcome when going after new business.
8. Understanding the benefits, changing the culture.

52. Please comment briefly on the benefits your company has obtained from adopting program management disciplines.

1. Improved awareness of program issues and risks; clarity around project prioritization and resource assignments for projects within a program;
2. Visibility into projects at the Enterprise level
3. Budget savings is probably the most noted, roles and responsibilities are clearer at the start of projects leading to ontime deliverables, and leadership acceptance of additional needs of the PMO now that the many projects managed have been delivered ontime and on budget. Proven deliverables.
4. Better coordination and communication of efforts needed to achieve program goals. Also more consistency in project management.
5. A clear understanding of alignment of business and IS goals reduces risk of rework / contention between projects. Working relationships between Business and IS grow stronger in trust and cross-pollination of knowledge when done well.
6. Streamlined, consistent, measurable processes that are used on all programs. Puts everyone on the same page using the same resources to manage projects and programs. Results in consistent and reliable management approach that translates to improved customer satisfaction.
7. Better alignment of projects. Reduce overall cost.