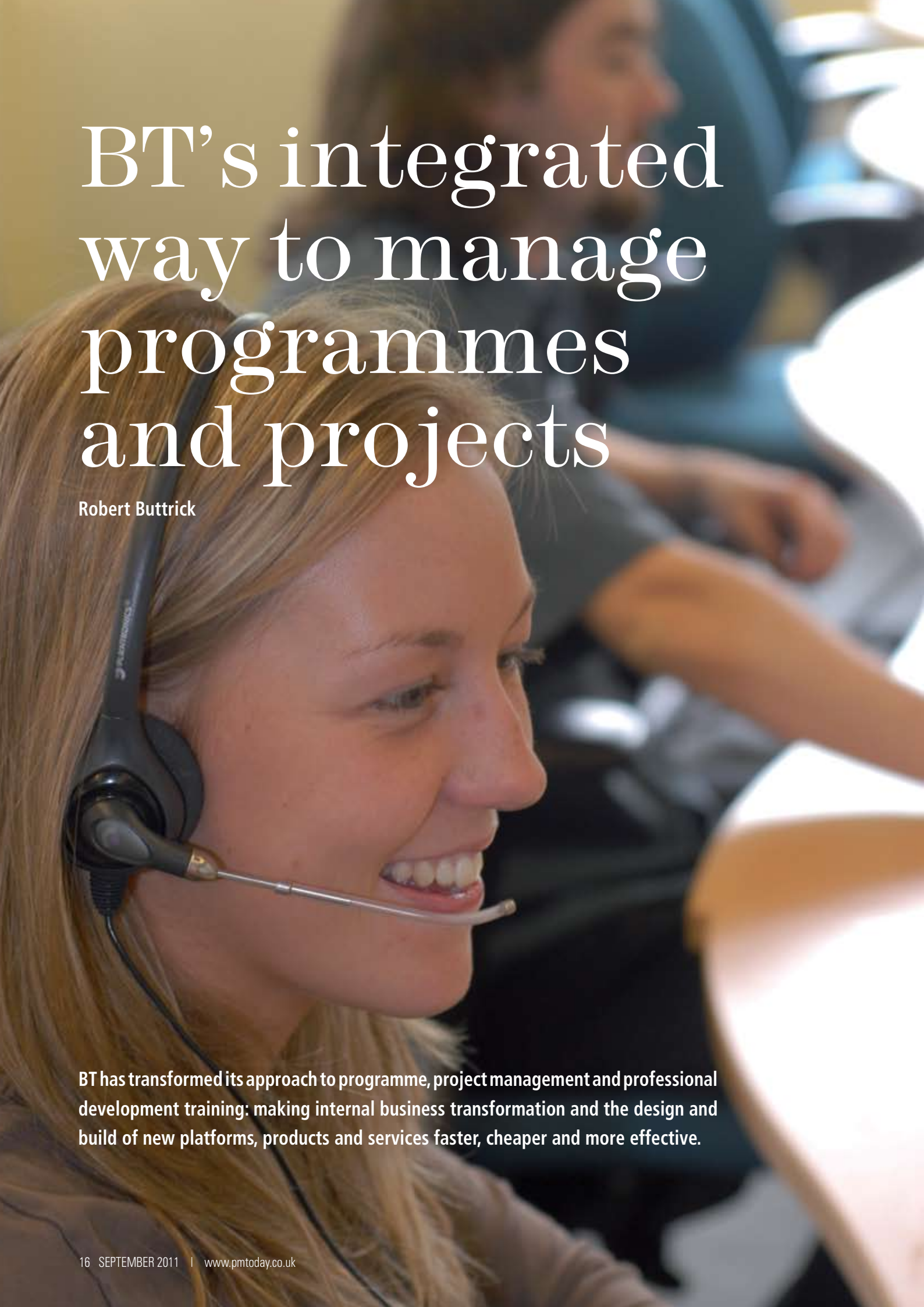


A close-up, profile view of a woman with blonde hair wearing a black headset with a microphone. She is smiling and looking towards the right. The background is blurred, showing other people in an office or call center environment.

BT's integrated way to manage programmes and projects

Robert Buttrick

BT has transformed its approach to programme, project management and professional development training: making internal business transformation and the design and build of new platforms, products and services faster, cheaper and more effective.

"This knowledge centre is a great collection of best practices within the BT operating model. I particularly appreciate the rigour of documentation, the ease of navigation and the guidelines for adapting the processes to local/program needs. Well done!"

The BT PPM Method is a common management approach for our teams to use when working together on programmes and projects. This approach brings clarity, consistency and control, while saving time and money. The main advantage is that individual teams across BT no longer need to agree their working approach each time. It also means we can mobilise our teams much faster than in the past.

BT employs over 90,000 people across more than 170 countries worldwide. At any point in time there are hundreds of programmes and projects running simultaneously, for our customers and our own needs - such as new products and services, new platforms and various aspects of business transformation. Cross-company working is essential, because nothing we do can be achieved by the efforts of a single team, working alone.

Reinventing the wheel

But why create a new method? Couldn't we have just taken PRINCE2 and MSP and used them 'off the shelf' without reinventing the wheel?

When we first looked across the business to start defining our method, we found about 20 different approaches already being used and none of them matched. So, by creating a single new method, we are reinventing the wheel, but we're doing it in an innovative way that adds real value. We have drawn on MSP and PRINCE2, but also adopted the best elements of other published approaches and combining them with the 'real-life' experience of our people.

MSP and PRINCE2

We used these as the basis for our method and ironed out many of the inconsistencies between the two. We also made the terminology consistent; for example, we use 'programme sponsor' and 'project sponsor' rather than 'Senior Responsible Owner' and 'Project Executive'. (APM, PMI, BS6079 all use the term sponsor.)

BS6079 Part1:2010

This new (and very good) standard has a wider scope than PRINCE2 and also provides architecture for a method, showing how the elements fit together. By blending this with PRINCE2 and extending the relevant parts to programme management, we made sure we have consistency across BT's new method.

CMMI for Development

BT has a number of major programmes which have undergone the 'CMMI experience' as a pathway to continuous improvement. This approach includes a number of aspects around project management which are not included in PRINCE2, so we have drawn on these to fill the gaps.

APM and PMI bodies of knowledge

As our people can choose to take either APM or PMI qualifications for their professional development, the BT PPM Method has been cross referenced against these bodies

of knowledge to make sure they understand the mapping. We also use these as a good source of terminology and definitions, when MSP and PRINCE2 have been found wanting.

By taking a very broad view on global practice, BT is able to show compliance. For example, when someone at BT uses the Method, they are using PRINCE2. We have a series of booklets which explicitly describe how the principles of the 'public domain' approaches are applied and these are especially useful for people new to BT and for our customers. They provide a shortcut to understanding the Method, based on the things they have already learnt about.

Getting the language right

BT is a global organisation and whilst its business language is English, for many people English is their second language and they mentally translate what they read. We needed to address this in our method. For example, PRINCE2 has two processes: 'Starting up a project' and 'Initiating a project'. Try explaining to a Frenchman the difference between 'starting up' and 'initiating'! So we changed the first part of PRINCE2 to be 'identifying a project', to match the terms used in MSP.

In the same way, we have drawn on our experience working with the International Standards Organisation to avoid words which are known to cause offence or can be ambiguous. 'Execute/execution' is one such word and we have avoided it and talk of 'undertaking' or 'performing' instead. We don't insist on people using the formal terms in their discussions - this isn't George Orwell's 1984 - but we do make sure we use the defined terms consistently in all our communications and documentation.

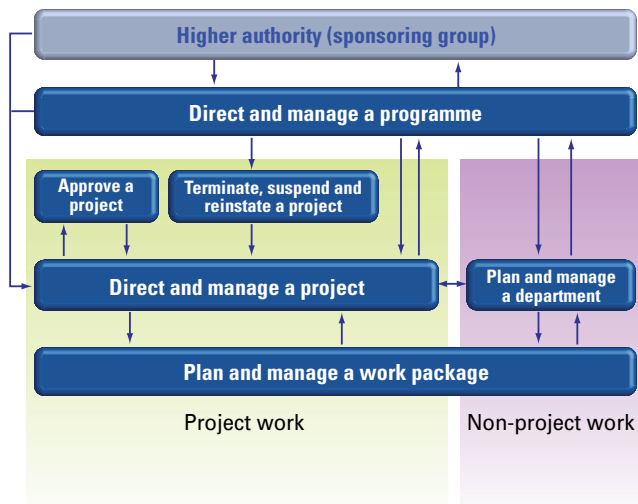
As time moves on, more and more people pick up the new terms simply through exposure and familiarity.

The integrated architecture

Let's look at how the method is constructed. In essence it follows the architecture in the new British Standard, BS 6079 Part 1: 2010, but extends this to include programme management. In this way we have created a fully integrated method with total consistency. It is also ready for formal portfolio management, when needed. There are two sets of procedures:

Firstly: **Management procedures** (BS6079 calls these integration activities), which detail all the activities needed to undertake a programme or a part of a programme.

And secondly: **Support procedures**, which relate to detailed guidance for undertaking a particular aspect of management called for in the management procedures. For example, a management procedure may tell you to manage risk. The support procedure, 'Manage programme and project risk' tells you how you should do it. The support procedures are separated from the the others as they can be drawn on for any one management procedure. As such, they are



Building the method

The creation of the method was done using agile principles. As soon as we had a set of useful documents, it was published as a foundation for building the rest. This included the management procedures and glossary. We added more collateral week by week, making it available for use as soon as it was ready.

Meanwhile a working group was set up with people from every part of the business to review the materials before formal approval and publication. We charted progress using a simple burn-up chart, showing the number of documents completed. In true Pareto fashion, 80% of the documents were completed within 20% of the lapse time!

"You would not believe how much I now use from the Wiki"

depicted on the method's web site as a circle, surrounding the management procedures. They fall into 3 groups:

The **control procedures**, such as benefits realisation, risk, issues, change control, planning, reporting, stakeholders, communications, configuration management and document management.

The **quality procedures**, which include assurance, quality reviews, meeting, audit, peer reviews, induction, programme training, lessons learned and defects.

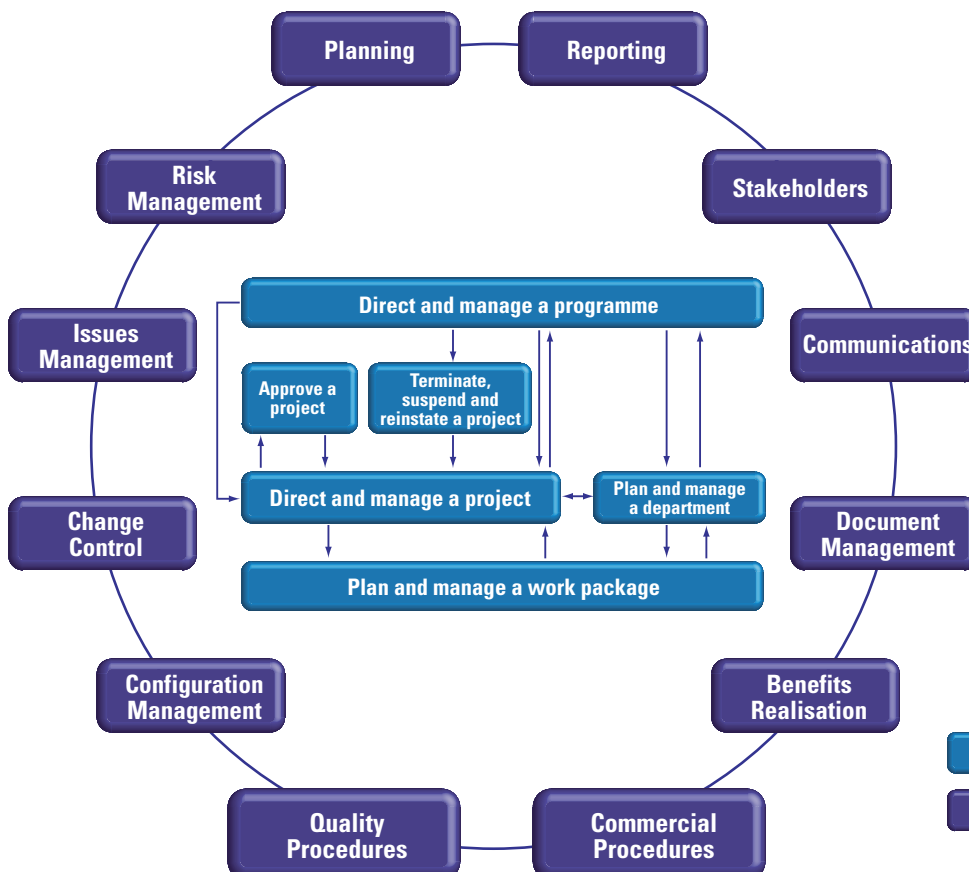
The **commercial procedures**, which are owned BT Group functions in BT and include customer contracts, procurement, supplier management and finance.

The method is not enough

Having a method is a good start, but it's not enough to ensure practice within our teams will improve. For effective programme and project management (or any business activity for that matter), you need.

Accountability: a person who is held to account and relied on to make something happen.

Method: the practices and procedures to be used. If consistency doesn't add any value, don't bother with methods and procedures.



Metrics

5 management procedures

20 support procedures

34 guides

93 templates, most with product descriptions

128 glossary terms defined



"This is genuinely one of the best corporately-aligned PPM Methods I've come across"

Systems and tools: these make using a method more reliable, consistent or efficient.

Culture: sets the tone for how the accountabilities are undertaken and how people behave.

Change any one of these and it will impact the others. For example, if there is a culture of distrust, your methods and tools will be more complex as more roles for control and assurance will be needed together with complex permission structures to access project data. BT recently launched a template in SharePoint 2010 which can be used as the working area for a programme or project team. As the BT PPM Method already existed, the requirements for this new capability were already in place, probably halving the development time.

Role driven, independent of organisation structure and jobs

The method is role-driven and written entirely independent of BT's organisation structure. In this way both our customers and our own people benefit from having a stable approach, unchanged throughout the inevitable re-organisations that major companies are subject to. The key roles are:

- Programme sponsor looks after BT's business interests for the programme.
- Programme manager manages the programme on a day to day basis.
- Business change manager ensures change is embedded and benefits are realised.
- Project sponsor looks after BT's business interests for the project.
- Project manager manages the project on a day to day basis.

- Team manager manages an assigned work package.
- Team member provides input to the development of outputs from work packages.

The distinction between 'directing' and 'managing' is built into the method. The sponsor roles are accountable for 'directing' and the 'manager' roles for managing. In addition the 'sponsor' role is accountable for the relationship with the customer on customer facing programmes.

Being different, when difference adds value: tailoring

Tailoring is at the heart of the method. Whilst there is only one BT PPM Method, it can be tailored to suit individual circumstances. This is a vital aspect of any enterprise wide method. Just as we have tailored MSP, PRINCE2, BS6079, CMMI to create the BT PPM Method, our people can tailor it to suit their specific circumstances. Each procedure includes guidelines to help decide on what form the tailoring can take. Also, each standard product description also has a section on tailoring, describing what may be changed in the associated template. Yet, tailoring is not to be taken on lightly and it's not about personal preference, so we encourage people to tailor only when it adds value. The closer the base method is followed, the easier it is for the teams to get up to speed and start working on the real job in hand. If too much is changed, the induction costs for new staff to a programme will escalate and the programme manager will also be faced with on-going maintenance costs for the 'local' elements. They will also miss out on the continuous improvements relating to any standard procedures they have tailored from.

Too much...or too little?

The problem with an enterprise method is it not only has to cover both a wide range of programme and project types (hence tailoring) and also the range of skills of the people involved. At one extreme is the experienced manager who doesn't need every aspect spelt out. At the other end we have a person new to the discipline with little depth of understanding of the techniques. Provide too much detail and it's over-engineered; provide too little and people will say there is not enough substance for it to be useful. To address this, our step-by-step procedures are provided in three different formats:

- A summary flow chart for the top level map and each sub-step.
- A booklet (pdf) which people can download and print.
- A set of web pages with click through capability. This also includes some analysis of the procedures, such as RACIs, lists of activities or deliverables by role and activities or deliverables by procedure step.

All these are created from the same base data through the innovative use of an application by Business Optix, rather than fiddling with combining MS Word and Visio files and manually keeping them in step. The tool also made the development and maintenance of the method significantly simpler and cheaper than conventional approaches.

Bringing the method to our users

Naturally the method is brought to our users via the web. The home page is a simple diagram, from which each procedure can be accessed, with links to each procedure, roles and accountabilities, the templates and guides.

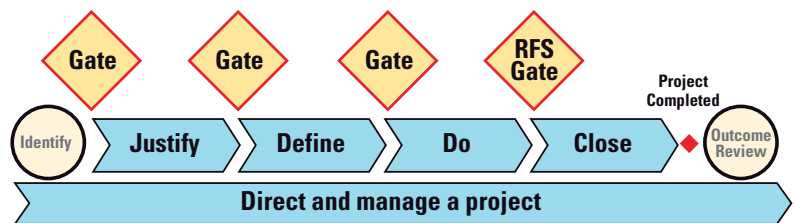
Guides are educational and written in a narrative form. They cover each procedure as well as more general topics such as governance, agile techniques, mobilisation, monitoring and control. Briefings are short videos which explain key aspects of a particular procedure.

Every web page has a section at the bottom where users can log their feedback and improvement suggestions - something that's key to making sure our method remains relevant and up to date.

Training

As well as the self-service web site, there's a range of training materials to support the method. Some are written specifically for BT whilst others are generally available. One advantage of keeping reasonably close to a published method such as PRINCE2 is that there is more commercially available material to draw on. For example, many BT programme and project managers have some form of either MSP and/or PRINCE2 accreditation. The training ranges from class-room based, computer based to 'learning pathways' where a person is directed through set texts.

Frameworks and lifecycles



Finally there are project frameworks or lifecycles that bind together the management procedures for a project with the specialist procedures or processes relating to the type of outputs the project is creating. Lifecycles are the primary vehicle for managing project risk. BT has a standard lifecycle, based on the concepts in BS6079-1:2010 (such as gates representing entry points to stages). This should be used if there isn't another mandated. Different projects have different needs and risk profiles, so they require different gates and stages and in many cases, the method or process used for key deliverables may influence this. BT can build experience by tailoring lifecycles from the standard in undertaking these specific types of project, adding to our body of knowledge and improving our delivery record.

Lessons learned, advice and tips

1. Draw on all best practice sources; none of them have everything.
2. Draw on approaches your people already use.
3. Fix your terminology early – create a published glossary.
4. Don't expect to please everyone, all the time.
5. Design your method architecture and then build the component parts in priority order.
6. Make the method independent of your organisation: write the content for long shelf life.
7. Ensure those who develop your method have experience and credibility.
8. Design the method so users can tailor it.
9. Make your web site "two way" to attract feedback.
10. Engage your stakeholders early and respond to feedback quickly and openly; you need to build trust.

About the Author

Robert Buttrick is BT's Programme and Project Management Method Director and is responsible for the development and continuous improvement of BT's method. Robert is also a co-opted member of the committee which developed the new BS6079 on project management as well as the emerging international standard. Outside BT he is better known as the author of 'Project Workout', which is now in its fourth edition and has been translated into five languages.

"I am a new contract PM at BT. I developed and implemented a similar site for the PMO Methodology at my previous company. I like this. It is nice to see the methods documented and shared for the company to present a unified process to its internal and external customers. Nice job!"
