Portfolió menedzsment folyamatok bevezetése

Kontra József ERSTE Bank Projekt Portfolió Menedzsment Iroda

18. Projektmenedzsment Fórum

Budapest, 2015. április 9.

ERSTE Bank

Pár szó az ERSTE gyökereiről

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PM kultúra az ERSTE Group-ban

EG PM Standard Concept
Approach

Project Management Institute

Experience & Common Best Practices — ERSTE GROUP

EG Project Management Standard

Project Management Meth
fits the Erste Group's par
business and organizati
environment.

Qualification	Successful completion
Knowledge Checks	Comprehension of EG General PM knowledg
Project Review	Ability of applying PM
Certificate	Award of EG Advanced
	Renewal Cycle: 3 years

PM Coaching in Erste Group

Author: Dominique Ionescu

The PM Coaching Programme started in December last year has finished after three demanding modules, ensuring a new competence in our Group.

PMO colleagues and program managers took part in this programme and learned how to conduct efficient **coaching and mentoring conversations** in order to support the Erste Group project managers to overcome obstacles and so reach their project objectives better and faster.

Project Management is a very complex process, covering the application of a wide variety of knowledge, skills, tools and techniques to project daily activities in order to **reach the project objectives**. Even that most of the times managing projects is a straight forward execution of the defined process steps, in many cases the project manager faces real challenges not only due to the fact that projects differ from one to another in terms of complexity, business area, stakeholders, technical solution, etc., but also because project managers work in complex systems environment (influenced by its past and context, characterized by unpredictable outcomes).

In some **specific situations** managing stakeholders, ensuring proper risks mitigation, enhancing team motivation (especially within Group projects) and conflict resolution, increasing delivery performance including quality assurance - just to mention some challenges - become certain issues for the project manager.

PM Coaching is a **combination of PM Mentoring** (providing advices and tips from personal experience) and **Personal Coaching** (enabling the competencies & resources of the coachee). This is why PM Coaching is following a solution-focused and resource/strength-orientation approach, helping the project managers to find ideas and solutions to overcome their issues (it is known that more than half comprise of "get stuck" and "decision making" type of issues).

The **PM Coaching service** (offered starting June 2014) is addressed primarily to the **senior project managers** from our Group (only employees - not external resources), in order to better support them throughout the entire project lifecycle solving specific challenges (for which trainings and past experiences provided no solution), enhancing the project implementation success rate.

Here are the Erste Group PM coaches which graduated the PM Coaching Programme:

Peter Weiss (Erste Holding)
Yosef Schaban (Erste Holding)
Dominique Ionescu (Erste Holding)
Gertrude Rieppl (Erste Holding)
Barbara Eisl (Erste Holding)
Hartwig Zoppoth (Erste Holding)
Luminita Mariana Buchidau (BCR)
Elena Luminita Zorlescu (BCR)
Sanja Georgina Stropnik (EBC)
Tomica Bazdar (EBC)
Katinka Busne Halasz (EBH)
Kristian Morovic (EGCP) and
Zuzana Skurkova (SLSP)

In order to benefit from our **PM Coaching service** and schedule one or more coaching sessions to get ideas how to solve your specific Project Management issues, please contact the **PMO Head in your entity** (GPMO for ONE IT AT, EBC PMO for EBS colleagues). We encourage you to make use of the experience and coaching competence of our Group PM coaches, surpassing difficult situations you encounter in your projects and build-up confidence for future endeavours.

I'm proud to announce, that from now on we can also offer a group-wide PM Coaching service to project managers internally – cross-borders and cross-companies – a real good example of group-wide collaboration!

Please also have a look at the other topics in this newsletter: a good article from Karim Kiani about the difference between Change Management and Change Request Management – probably one of the most popular misunderstandings in Project Management. Furthermore, enjoy the helpful tips & tricks regarding usage of MS Project and more other interesting information!

Enjoy reading and have a good summer 2014!

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Portfoliómenedzsment előzmények – az E2015 program

Wave

Actions

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Ahonnan indultunk

Project governance | **Program governance**

Project

Project SC

Scope: Escalate project related issues, make project level decisions

Decision levels:
- Budget: -
- Time: -
- Scope: closure of certain milestones

Timing: occasional
Participants: Sponsor, BO, PM, PIB members

Operative project meeting

Scope: Discuss project related topics, monitor projects tasks

Decision levels:
- Budget: -
- Time: -
- Scope: -

Timing: occasional
Participants: PM, relevant project team members

Workstream

Workstream portfolio governance

Scope: Coordinate and monitor functional portfolios within work streams

Decision levels:
- Budget: no effect on total budget
- Time: internal milestone
- Scope: no effect on resources

Timing: biweekly
Participants: Sponsor, relevant PPM, relevant B-1

CxO briefing

Scope: Discuss any project related topic, ensure CxO is informed

Decision levels:
- Budget: -
- Time: -
- Scope: -

Timing: biweekly
Participants: Sponsor, relevant PPM

Program

Program SC

Scope: Monitor EBH portfolio execution, control portfolio elements, program execution, decide on program priorities

Decision levels: program priorities, program issues

Timing: biweekly
Participants: Board members, Program managers

EBH Board

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A cél: kisebb menedzsment fókusz a projekteken, nagyobb fókusz a portfolión

Project governance	Program governance	Portfolio governance
• Project sponsoring can be delegated to „B-1”. • First „B” level involvement can be on the Work Stream. • Changes without effects on approved scope, budget and timing has to be delegated to Program Steering committee.	• First priority: overall program level decision making. ▪ Overall program budget. ▪ Program KPI’s and alignment with program scope. ▪ Decision on new program elements (scope or project). • Decision on issues escalated by project governance. • Approval of changes without effects on approved program scope, budget and timing without Board ratification.	• First priority: decision on EBH-s project portfolio. ▪ Portfolio elements: programs, standalone projects. ▪ EBH level issues: inter directorate resource conflicts, EBH level budget conflicts, scheduling conflicts related to multiple KPI’s and BAU tasks. ▪ Approval of changes with effects on approved program/project scope, budget and timing with Board ratification.

EBH Board members will get better insight on the overall project portfolio with less effort to be spent. Decision making on EBH level resource conflicts will be solved on Portfolio governance forum.

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Governance területek szétválasztása

Project /Program governance

Project

Project/Program SC

Scope: Escalate project related issues, make project level decisions

Decision levels:
- Budget: -
- Time: -
- Scope: closure of certain milestones

Timing: occasional
Participants: Sponsor, BO, PM, PIB members

Operative project meeting

Scope: Discuss project related topics, monitor projects tasks

Decision levels:
- Budget: -
- Time: -
- Scope: -

Timing: occasional
Participants: PM, relevant project team members

Portfolio governance

Workstream

Workstream portfolio governance

Scope: Coordinate and monitor functional portfolios within work streams

Decision levels:
- Budget: within the board member's budget
- Time: independent milestones
- Scope: no effect on resources of other areas

Timing: biweekly
Participants: Sponsor, relevant PPM, relevant B-1

Portfolio

EBH portfolio governance

Scope: Monitor EBH portfolio execution, control portfolio elements

Decision levels: enterprise priority setting, portfolio issues, portfolio budget

Timing: monthly
Participants: Board members, PPMs

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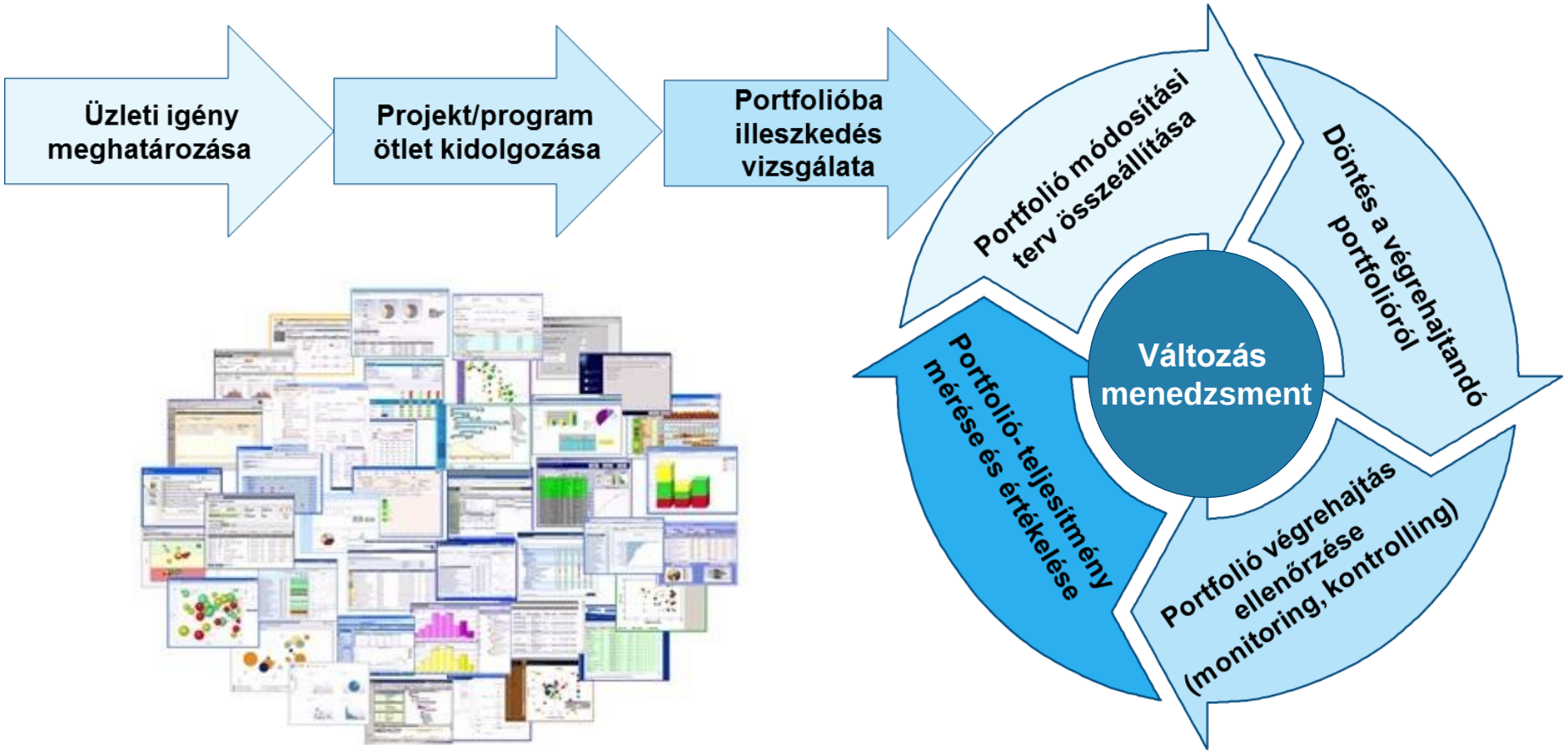
Projektportfolió-irányítás

Az ügyvezetőség által elfogadott szabályzat (2014. december 17.)

Delegált jogkör a projektportfolió-irányító testületnél

Tagjai a projekt szponzorok (ügyvezetőségi tagok)



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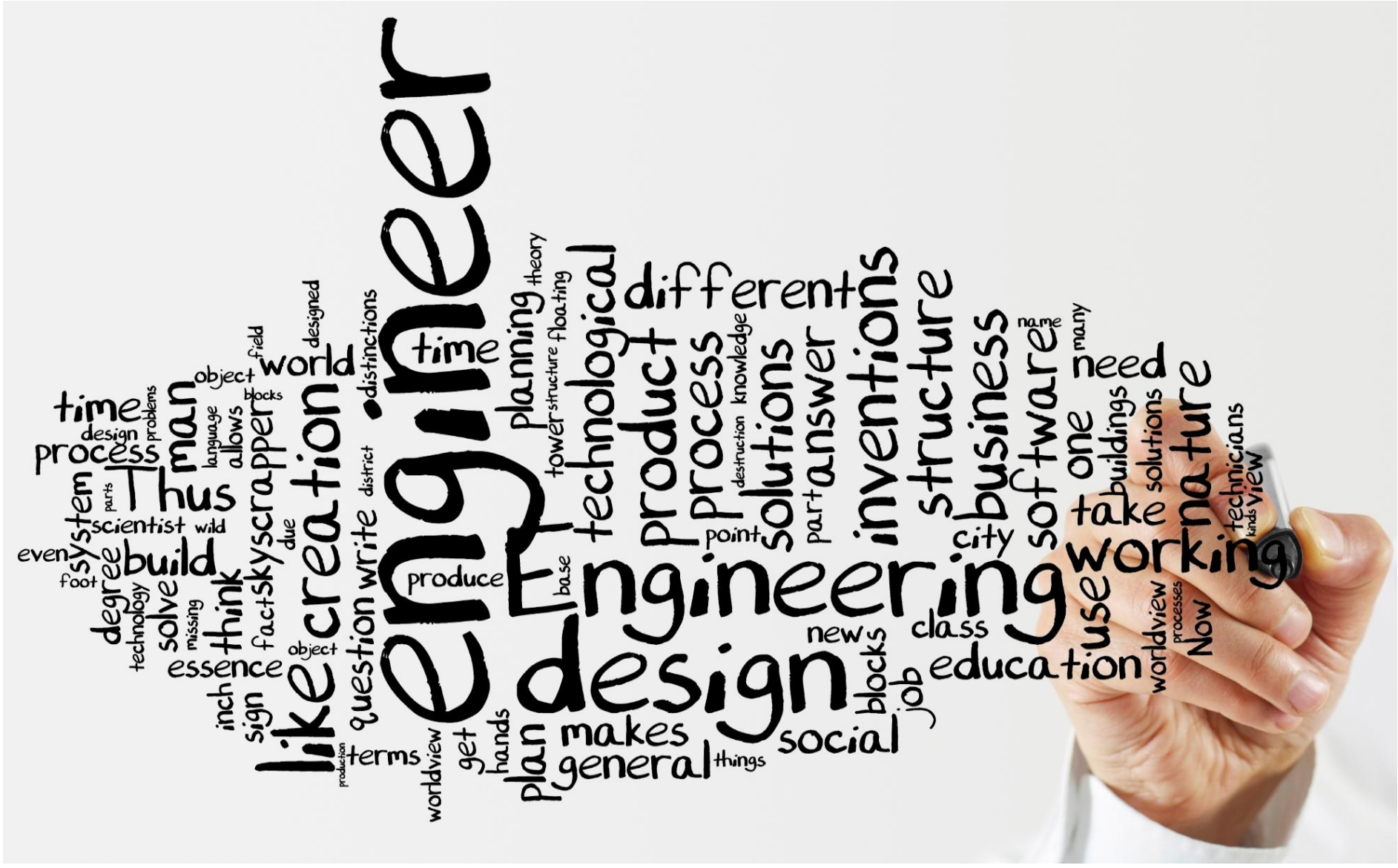
A PPMI szolgáltatásai



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PM és PPM tudások hozzáadott értéke a banki eredményességhez

The mission of the Project Portfolio Management Office is to optimise and secure EBH's project investments with

- supporting the governance of EBH's project portfolio

and

- providing professional services in the field of

  Project Management,

  Project Administration

  and project related Business Consulting.

In order to reach it's strategic and business goals EBH – as a normal business activity – executes number of various size- and complexity projects.

The invested value and the effects on the non-project business activities requires enterprise level project portfolio governance and industry standard- and high quality project management in place.

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