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aPerizi

Portfolio Management: il gioco di squadra fra Portfolio Manager e Line Manager

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Il Contesto

- UniCredit Business Integrated Solutions, Credit Risk Factory, Milano-Monaco di Baviera, Vienna
- Change: 150-200 progetti
- Run: budget annuale per la manutenzione del parco applicativo
- Persone impegnate: interni circa 50; esterni circa 200 in funzione delle esigenze
- Gli stakeholder principali
 - Regulator
 - Funzioni di business (GRM, CFO, CRO), Validazione, Audit
 - Organizzazione
 - BRM – Business Relationship Manager
 - V-TServices (Infrastruttura IT)
 - Fornitori (sviluppo applicativo e tecnologia)



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Mi serve un PMO per...

- Verificare l'avanzamento dei progetti in termini di
 - Economics
 - Rispetto delle scadenze
 - Scope management
- Misurare l'efficienza del run
- Gestire in modo razionale lo staffing dei vari progetti nell'arco dell'anno



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Ma è un portafoglio o un programma...?



Figure 1-3. The Organizational Context of Portfolio Management



What is a Portfolio?

- A portfolio is a component collection of programs, projects, or operations managed as a group to achieve strategic objectives.
- The portfolio components may not necessarily be interdependent or have related objectives.
- The portfolio components are quantifiable, that is, they can be measured, ranked, and prioritized.

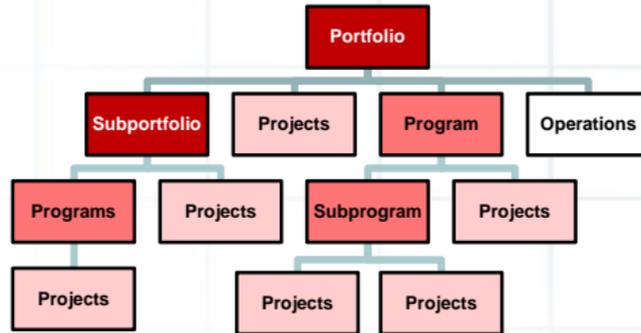




Table 1-1. Comparative Overview of Project, Program, and Portfolio Management

Organizational Project Management			
	PROJECTS	PROGRAMS	PORTFOLIOS
Scope	Projects have defined objectives. Scope is progressively elaborated throughout the project life cycle.	Programs have a larger scope and provide more significant benefits.	Portfolios have an organizational scope that changes with the strategic objectives of the organization.
Change	Project managers expect change and implement processes to keep change managed and controlled.	Program managers expect change from both inside and outside the program and are prepared to manage it.	Portfolio managers continuously monitor changes in the broader internal and external environment.
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.	Portfolio managers create and maintain necessary processes and communication relative to the aggregate portfolio.
Management	Project managers manage the project team to meet the project objectives.	Program managers manage the program staff and the project managers; they provide vision and overall leadership.	Portfolio managers may manage or coordinate portfolio management staff, or program and project staff that may have reporting responsibilities into the aggregate portfolio.
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.	Success is measured in terms of the aggregate investment performance and benefit realization of the portfolio.
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.	Portfolio managers monitor strategic changes and aggregate resource allocation, performance results, and risk of the portfolio.





Table 3-1. Portfolio Management Process Groups and Knowledge Areas Mapping

Knowledge Areas	Process Groups		
	Defining Process Group	Aligning Process Group	Authorizing and Controlling Process Group
Portfolio Strategic Management	4.1 Develop Portfolio Strategic Plan 4.2 Develop Portfolio Charter 4.3 Define Portfolio Roadmap	4.4 Manage Strategic Change	
Portfolio Governance Management	5.1 Develop Portfolio Management Plan 5.2 Define Portfolio	5.3 Optimize Portfolio	5.4 Authorize Portfolio 5.5 Provide Portfolio Oversight
Portfolio Performance Management	6.1 Develop Portfolio Performance Management Plan	6.2 Manage Supply and Demand 6.3 Manage Portfolio Value	
Portfolio Communication Management	7.1 Develop Portfolio Communication Management Plan	7.2 Manage Portfolio Information	
Portfolio Risk Management	8.1 Develop Portfolio Risk Management Plan	8.2 Manage Portfolio Risks	



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Cosa abbiamo fatto per gli obiettivi che ci eravamo dati:

- Verificare l'avanzamento dei progetti
 - Interviste e riunione settimanale di avanzamento progetti/run
- Monitoraggio degli economics
 - Introduzione di misurazione di base sui singoli progetti: actuals, ETC, EAC, cost index
 - Rappresentazione complessiva a livello di portafoglio ed integrazione con il ciclo passivo
- Misurare l'efficienza del run
 - Individuazione e misurazione di KPI mirati
- Gestire in modo razionale lo staffing dei progetti nell'arco dell'anno
 - Censimento, consuntivazione, resource levelling and balancing



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La seconda fase progettuale

Risolto il primo input (monitoraggio avanzamento progetti, monitoraggio dei costi e rilevazione dei primi KPI del run) i passi successivi sono stati:

- Gestire la coerenza dell'insieme dei progetti con la strategia aziendale
- Presidiare il processo di approvazione del portafoglio
- Presidiare il processo di funding dei singoli progetti
- Evolvere verso un modello industrializzato della gestione dei fornitori



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Il gioco di squadra

Torniamo al tema iniziale di questo intervento: il gioco di squadra fra Line Manager e Portfolio Manager

- Qual è il ruolo del portfolio manager?
- Come si relaziona con il line manager?



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Domande...?