How embracing Business Transformation enables Project Organizations to Deliver Greatness

Ivan Lloyd CEO, edison365









Understand the difference between Project /Portfolio Management and Business Transformation. What's needed to be a Business Transformation success Key Takeaways The benefits of bringing PMOs into the business transformation process How your Project Organization can be more important than ever







Let me introduce myself...





edison365 Founder and CEO

Over 30 years of consulting experience in Business Transformation

Question Who are you?



A PMO

- B IT Management
- C Business Analyst
- Project Management
- E Head of Projects
 - Innovation Management

G Other

F



What is Business Transformation?



Business transformation is the process of *fundamentally* changing how a company operates to achieve *significant* improvements in performance, efficiency, and competitiveness.

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you."

- Marc Randolph



"If you are unwilling to disrupt your business, there will always be someone willing to do it for







Organizations excel at Business Transformation– Surely?

Only 34% of organizations surveyed reported that they successfully executed their strategic initiatives in the past three years.

Harvard Business Review

70% of organizations failed to achieve their strategic objectives due to lack of execution. **KPMG**

process was effective.

Companies that fail to execute their strategy experience a **50%** decline in shareholder value. McKinsey & Company

37% of executives cited lack of Only **10%** of organizations felt they alignment and poor had the necessary skills, communication as the top barriers resources, and leadership to execute their strategy effectively. to successful strategy execution. **PWC IBM**



Only **16%** of executives felt their

organization's strategic planning

McKinsey & Company

Only 29% of projects were successful in meeting their budget, schedule, and quality goals. Standish Group



What's the lost opportunity?

Business Transformation spend is forecast to reach almost \$4 trillion in 2027

70% of Business Transformation fails to deliver

\$2.8 trillion of wasted investment and a failure by organizations to capitalize on their vision



Source: IDC 2024





Where are organizations failing?

- End-to-end visibility is unavailable
- Strategy is not disseminated or understood
- Objectives & change are not aligned to the strategy
- Failing projects are not stopped
- Benefits are rarely tracked to realization
- Decision-making is slow and fails to have the right
 - information
- Innovation & delivery are not aligned
- Business cases are not standardized or revisited
- Lessons learned are not noted or adopted



Fundamentally

'organizations fail to track business transformation initiatives, which can total in the hundreds, if not thousands, for a Fortune 500 company. What's the process and the structure by which you're going to track things, from an idea all the way to when it hits the balance sheet'

- McKinsey









Where to focus...

Sponsorship

Budget

Process

Organization

Communication

Culture

Technology









Sponsorship

Challenge

In most organizations, the end-to-end process spans business units and ownership. Many organizations have different PMO executives, Innovation Leaders, and Heads of Strategy. This is compounded by these roles often being in different business units



Solution

- An executive sponsor with ownership
 - for the end-to-end Business
 - Transformation delivery







Budget

Challenge

PMO's and Innovation Teams are often poorly funded; viewed as an administrative, QA and reporting function rather than a critical business function



Solution

The business needs to hear and understand the value and the success the Business Transformation team delivers.

() @edison365software





Process

Challenge

Organizations lack the clarity of single end to end process that is communicated and understood across the organization









From Idea to Balance Sheet

• Definition of drivers

Strategy

- Expected Outcomes/Benefits
- Timelines

- Proving alignment
- Defining benefits, costs, resources, timelines, risks

Justification

• Optimizing the Portfolio

• Defining challenges

Innovation

- Driving innovation
- Qualifying ideas





- Managing the project
- Realizing benefits



Organization

Challenge

PMO's and Innovation Teams are often poorly funded; viewed as an administrative QA and reporting function rather than a critical business function



Solution

- A single organizational unit
- responsible for the end-to-end
- **Business Transformation Process.**













The Business Transformation Office





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Benefits of a Business Transformation Office

Single source of truth

End-to-end business transformation

Vision, processes, and standards aligned

Benefits tracked and realized

Lessons learned from idea to benefit

Combines the best of two cultures

One reporting entity









Communication

Challenge

Project Organizations rarely excel at communications. To gain sponsorship, engagement and to excel, stakeholders and colleagues need to understand the strategy, buy in to the importance of the process and hear the successes









Communication

S \mathbf{O} U ti 0 n

Create a safe place to be transparent and come forward with concerns or suggestions

Build awareness of project portfolio performance Be a salesperson for your PMO



Strategy needs to be disseminated and understood

The whole organization needs to be engaged in Innovation.







Culture & Skills

Challenge

Culture is central to success and encompasses the culture of the Business Transformation Office and setting and driving the culture of the organization







Culture & Skills





An ability to understand failure learning

Expect a combination of high influence and strong compliance personalities





Technology

Challenge

Organizations lack a single solution to manage the process from Idea to Balance Sheet. How do you know where the value is, what to prioritize and what is needed if you only have a small part of the picture?











A single solution for end-to-end Business Transformation















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Validate the ROI

Manage Projects & Portfolios



A single end to end picture







What Users <u>Really Love</u>

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~	Powered by Microsoft	~	Minimi
~	Scalable to your needs	~	Afforda
~	Superb flexibility and customization	~	No mo
~	Zero expensive consultants	~	Real-ti















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- ize your tech stack
- able licensing
- re disconnected teams
- me collaboration













"Easy to use and a great user experience!"

Straightforward and really effective way to manage ideas, business cases and projects across an organization and extremely easy to use for all employees. Quick to set up, and onboarding users is very easy, helped by an intuitive interface.

- Chris A. Business Development Consultant

"

"End-to-End Solution Set"

"The entire suite is great. Ideas streamlines our innovation process with a minimum of IT support. Business case helps further clarify what ideas should get approved. Projects helps us manage the work. Datastore is great for aggregating and reporting project information to improve decision making."

> **** - Mike T. Chairman

Read more reviews







"Great Platform"

"We identified \$1 Million of lost revenue per annum through the collection of ideas submitted through edison365ideas. That was within the first few months of turning the system live and so we're excited for what other impactful ideas are put forward in the future."

- Ben Chandler. Chief Innovation Officer





Any Questions?









Continue the conversation!

Ivan.Lloyd@edison365.com

Connect with me on LinkedIn:



Visit our Booth









PLATFORM DEMO

Simplify Projects, Customize Your Process, and See Real Results!



13:00 SAST / 12:00 CET

www.edison365.com



SIGN UP HERE









Business Transformation Starts Here!

How edison365 supports your end-toend journey







Strategize Effortlessly

Align every project, idea, and opportunity to valuedriven business objectives and steer your organization to greatness.

8

Create **programs** that align with your strategic objectives and unlock a clear sense of direction.

> Use default templat build your own to su your needs.



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Profitability	Amber	Amber	High
Start Date *	Risk Status *	Schedule Status *	Decision Date *
31 Oct, 2023	Green	Green	31 Dec, 2023
End Date *	Scope Status *	Cost Status *	
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Executive Summary

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Overview

Updates

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The Operational Efficiency Optimization program is a strategic initiative aimed at enhancing the productivity and performance of an organization by refining its operational processes. This program is built around a comprehensive approact bottlenecks, eliminating waste, and leveraging advanced technologies and methodologies to streamline workflows. By focusing on data-driven decision-making, the program provides actionable insights that lead to significant cost reduction faster delivery times

Key components of the program include process analysis, performance metrics, automation, and continuous improvement strategies. These elements work in tandem to create a culture of efficiency and agility within the organization. The collaboration and employee engagement, ensuring that all stakeholders are aligned with the overall objectives.

The anticipated outcomes of the Operational Efficien the program ensures that the organization remains r What would like to create?	ily monito etitive edg
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STRATEGY

Complete Transparency Across Your Organization

Make your mission clear and improve team collaboration, ensuring everyone is aligned and working towards the same objectives.





Create **challenges** to respond to your program objectives. Capture ideas and project requests in one place.



888

Ready. Set. Innovate.

Tap into the creativity of your team and uncover hundreds of transformative ideas in a collaborative environment.





Develop a Standardized Process

Make exceptional innovation repeatable with streamlined processes in edison365. You determine what works best and how to measure your results.



edison365's **Triage** sliders give your reviewers a simple, objective way to evaluate.

Use the **Board View** to drag and drop ideas through your business process.





Give Your Opportunities the Greenlight

Rapidly evaluate and scale the best proposals, backed by detailed research, reports, and insights uncovered in one streamlined platform.





Build out the business case and include a **schedule**. Easily carry this data over to the project.

F

Workflow your business cases through a review process and get approval from the right people.

Seamless Approval Tools

Create a streamlined approval process and be confident your decisions are supported by key stakeholders.

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Use **RAID** and **cost/benefit** tables to understand the expected ROI of your investment.





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Ready-to-use **reports** enable you to make decisions with confidence.

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Delivery Success Every Day

edison365 isn't built simply to plan for success, but to help your business implement, execute, and accomplish more, day-to-day.

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Build a **project** from the business case and carry over your data, saving you time.

Give your Project a Name

Please Enter A Title

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Cross-functional Collaboration

Improve communication and gain insights and updates from your project teams with a suite of holistic tools your entire workforce can collaborate on.

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From dependencies to progress tracking, prepare for anything with **Gantt Charts**, and stay accountable with task and key item ownership.



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Plan tasks quicker with edi. Your **AI** assistant powered by Microsoft Azure AI.

Stay Accountable, Always

Assign owners to key tasks, items, and more to ensure every team member is working towards the same business objectives efficiently.

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Q Ideas	Name	Calendar	Role	Department	Sun 06 jan 2022	Sun 06 jan 2022	Sun 06 jan 2022 S M T W T F S S M	Sun 06 jan 2022 S	
Challenges	William Dennis	Standard	Designer	Product		Customer Experience Enhan			
Business Cases	Paloma Armada	Standard	Sales	Sales	CRM Implementation Configure and deploy a Customer Relationshi		e Redesign	Technology Upgrade and Moder Evaluate the company's existing technology infras	
8 Projects	Gamboa	Standard				Talent Retention	and Development ates and identify key factors contributing	to attrition	
命 Home	Poppy Barber	Standard	Delivery	Delivery		Customer Experience Enhan Analyze the customer journey and touchpoin	icement hts, identify pain points and areas for improvement, and deve	Task Details	
2 Personal	Ivan Lloyd	7 Day	CEO			SP ERP Int Integrate vario		C Record Name	
A Resources	Paul Mather	Standard	сто	Product	S Cybersecurity Audit Conduct a thorough cybersecurity audit		Product Portfolio Rationalization identify underperforming or redundant products, and	Project Name	
II. Reports	Jack Selman	Standard	Delivery an	Delivery		S Market Researc gather insights on custome	Evaluate the current supply chain processes, identify	Owner(s):	
₽ _{\$} Administration	William Dennis					6 6 6 6 6	6 6 6 6 6 6 6	Task Name Talent Retention and Development	
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Allocate **resources** efficiently. From your workforce to stateof-the-art equipment. Know where everything is and where it should be to achieve your goals.

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Identify and evaluate every **risk** with customizable tables and develop mitigation strategies with confidence.

DELIVERY

Keep on top of everything on your Personal page. Gain insights and updates from your project team.

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Review progress at a program level.

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Stage Approval

Review

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History × {itemName} 11/04/2023 DASHBOARD RECORDS REVIEWS ITEMS TASKS Submitted 16/05 11:31 No Comment () Not seeing the expected results? Make sure you are assigned as the owner for table items. Alex Bloggs 16/05 11:41 Rejected Show Hide 8. Paul, thank you for your submission. I have reviewed your proposal, and while the overall strategy looks solid, I have a few concerns: Due Date Record Name ↓ Table Na 1. The budget allocation seems overly optimistic. Could you provide a more detailed breakdown of expected 10/05/2024 😵 Adult and Community Learning Service Rename costs? 2. The timeline for implementation is quite aggressive. Have you accounted for potential delays? Please address these points and resubmit. 🔗 Adult and Community Learning Service 10/05/2024 Rename Self serve checkouts 31/01/2024 Costs Thanks for the feedback. I have adjusted the budget allocation and provided a more detailed breakdown in section 3. I've also Self serve checkouts 10/05/2024 Risks extended the timeline to account for potential delays. Please review the updated proposal. 10/05/2024 Self serve checkouts Risks Chumbeh Njie 17/05 13:45 Rejected Paul, I appreciate the changes made based on Jane's 🔗 Self serve checkouts 10/05/2024 Costs feedback. However, I believe there are still some issues: 1. The new timeline, while better, still seems a bit tight. Could you extend it by another two weeks to provide a Assumpt buffer? 2. The cost breakdown is improved, but I noticed that the 🕂 Timeline marketing channel costs don't include digital marketing specifics. Can you add that detail? Sun 13 Jan 2022 Sun 20 Jan 2022 Sun 27 Ian 2022 Sun 03 Feb 2022 S M T W T F S S M T W T F S S M T W T F S S M T W T Submitted 25/05 13:45 Chumbeh, thank you for your suggestions. I've extended the timeline by an additional two weeks and included the digital marketing specifics in the cost breakdown. Please review the revised proposal. Alex Bloggs 25/05 17:17 Approved 8. Paul, the proposal looks solid now. Thank you for addressing all the feedback. I approve the submission.

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> **Report** across the end-toend process.

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\sim	Name	Description	Owner	Due Date	Benefit Category	Estimated Benefit Value	Benefit Status	Realized Benefit Value	Realized Date	Highlight	
	Cost Reduction:	By eliminating waste and inefficiencies, companies can significantly reduce their production costs, leading to improved profitability		20 Dec, 2023	Financial (\$ USD)	50,000	Planned	4,800	7 Jul, 2024	Project	
\sim	Increased Productivity	Streamlined processes and automation result in higher production output and quicker time-to- market for products		22 Nov, 2023	Quality (# defects)	50	Planned	68	30 Jul, 2024	Program	
	Enhanced Product Quality	Lean manufacturing principles ensure consistent quality, reducing defects and improving customer satisfaction	8	17 Jan, 2024	Quality (# defects)	32	In Progress	14	4 Jul, 2024	Portfolio	
\sim	Competitive Advantage	Companies that adopt LeanLine gain a competitive edge by being able to respond quickly to market demands and changing customer preferences.		14 May, 2024	Financial († USD)	5.400	Classed	2 200	20.44-0 2024	Burian	
	Sustainability	Energy-efficient practices contribute to a reduced environmental impact, positioning organizations as responsible corporate citizens	A	29 Apr, 2024		How do estimated and realized benefit compare? Estimated Realized Cumulative Estimated Cumulative Realized					
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The **benefits table** can remain editable after the project wraps up.





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