CLEAR STAR

CASE STUDY

Transforming the Portfolio Management Team in a Large Government Department

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Situation

This Portfolio Management Team for a Large Government Digital Department numbered about 50 people, organised into 6 sub-teams, and had a wide range of responsibilities:

- **Supporting the Senior Leadership Team** with governance, prioritisation, and portfolio level decision making
- **Preparing and providing data on demand**, in flight work, and performance to support governance meetings.
- **Driving good practice and providing standardised tooling** for project and programme management and delivery across the Department
- Supporting engagement and alignment with broader **organisational and government standards and assurance** for funding approvals and digital delivery

However, the Portfolio Management Team had several significant challenges:

- **Agile delivery methodologies were being increasing used** within the Department, however these caused friction with existing governance processes, had no defined good practice or tooling support
- The Departmental was planning a significant move to **organising delivery around Services rather than Projects and Programmes** that would fundamentally change how portfolio management would work
- Tooling, good practices and governance processes **had been static for many years, and were now not fit for purpose**

The Head of the Portfolio Management Team therefore wanted to:

- Shift team members **from PPM roles into new Government DDaT (now GDaD) roles**
- **Re-organise the team around services** to align to the wider Departmental changes
- **Adopt new agile ways of working** with a culture of continuous improvement and ownership of problems and customer needs rather than processes

Task

Clear Star were asked to:

1. **Provide training and coaching** to everyone in the team on agile ways of working and operating as a service
2. **Support the re-organisation of the sub-teams around products and services**
3. **Support the adoption of agile delivery practices,** including big room quarterly planning
4. **Support the formation of a new Service Support Office (SSO)**
5. **Support a reset of the Portfolio Management Leadership Team** to focus on collective strategic guidance and delivery of shared strategic objectives

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Actions

1. **Established an agile engagement model** based on overall engagement outcomes, a monthly review and prioritisation of key initiatives, and commitment to monthly outcomes
    - Ensured a shared understanding of where our support would add most value
    - Defined key results for prioritised work
    - Agreed cadence of reviews to enable reprioritisation based on progress and emerging issues
2. **Established the service model** for the Portfolio Team
    - Clarified the overarching purpose, scope, and measures of success for the Portfolio Team
    - Identified how this would be decomposed into sub-services aligned to the teams within the Portfolio Team
    - Established the scope of each sub-service – the people, budgets, operational systems and processes, and change initiatives they were responsible for
3. **Established a Service Support Office (SSO)** to facilitate the operation of the Portfolio Team
    - Ran a team formation event to establish the role of the SSO, key responsibilities, ways of working agreements, and shared values
    - Supported the development of an SSO responsibilities document capturing the role and responsibilities of the team
    - Provided on-going coaching and support to the team as it established it's ways of working and the ways of working of the wider Portfolio Team
4. **Re-established the DDPT Leadership Team**
    - Ran a series of weekly works to establish key agreements on the role and responsibilities of the Leadership team, their shared values, and agreed ways of working
    - Supported the leadership team in adapting agile working practices – weekly planning and reviews and tracking work in JIRA
    - Provided on-going coaching to members of the leadership team on agile, service thinking, and shifting from management to leadership
5. **Provided formal training in** Service Thinking and Agile Ways of Working
    - Built a shared understanding of concepts, principles and terminology, and explored the ways of working recommended by key frameworks as a starting point
    - Covered Introductions to Agile, Scrum and SAFe, and Lean Portfolio Management

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6. **Provided individual coaching** to all members of the Portfolio Team
    - Open to anyone who wanted it
    - Covered practical elements from new roles and new ways of working, as well as personal and professional development
7. **Ran a development programme for new Service Owners**
    - Operated as monthly group workshops, both in person and virtually online
    - Covered a wide range of topics including service and product thinking, agile roles, functions and professions, service & product purposes and measures of success, objectives, epics and epic lifecycles, prioritisation, service organisations, and leadership teams
    - Focused on building shared understanding, reacting to emergent priorities, and building a shared community of Service Owners
8. **Introduced agile ways of working,** including big room quarterly planning
    - Ran several 1-day introduction to quarterly big room planning workshops
    - Led and facilitated the initial planning events whilst being shadowed, then supported and coached, before stepping back into an advisory role
    - Supported the evolution of big room planning as their needs changed – adjusting location, timescales and running order
9. **Introduced Lean Portfolio Management**
    - Established the set of Epics that represented their current portfolio of major change initiatives, ensured there was clarity around Epic leads
    - Introduced an Epic Roadmap based on delivery of objectives and outcomes to communicate priorities and delivery commitments to stakeholders
    - Introduced an Epic lifecycle, including innovation work to gain evidence for user fit, solution, cost and timescales, and commitment cases for governing acceptance of Epics into delivery
    - Established quarterly Epic review, approval, and prioritisation leadership events ahead of big room planning
    - Provided on-going coaching and support to Epic Owners
10. **Led the introduction of a culture of continuous improvement**
    - Ran formal team check in events to help team self-reflect on their performance
    - Ran education events on topics such as innovation and Lego Serious Play
    - Established quarterly inspect & adapt events for collective reflection, identification of blockers, and agreement on improvement actions

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Results

This work delivered transformative outcomes:

- DDPT successfully re-organised around services, transitioned to agile ways of working, and established a new leadership team setting strategic direction using lean portfolio management
- Results from a series of team check-ins showed that DDPT teams felt more ownership for their work, more empowered, with a stronger team purpose
- We trained nearly 100 people in agile ways of working, innovation, and lean portfolio management, with a NPS score of +42.
- A strong empowered SSO took ownership of the portfolio teams ways of working and has started to drive continuous improvement to make the team a great place to work
- Senior Leaders acknowledged the Portfolio Team as an exemplar organisation

Our work has set up this organisation to take ownership of their continued transformation, building confidence in the teams to embed a continuous improvement culture.

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