Introducing the Align Framework

1 Overview
The main foundation for building an effective programme and project management capability is the framework. The complexity is often underestimated and attempts to produce “light” frameworks produce frameworks that do not survive the increasing demands of maturity. Our experience is that the foundations for the long term need to be established from the start.

The Align Framework is designed to underpin your portfolio management development by providing a consistent lifecycle against which initiatives can be tracked and controlled.

Anyone who has worked in project or programme management can write templates, but it is the underpinning process and guidance that raises the performance.

The Align Framework has been built to address a number of common failings that we have witnessed from working with clients:

- Incomplete frameworks
- Frameworks that replicate manuals and basic theory but add no value
- Lifecycles are rarely adequate
- Themes such as risk, that are not connected to the lifecycle in any way or sit in isolation
- Generic role definitions with no application of the responsibilities
- Templates that bear no resemblance to the lifecycle or processes
- Disconnects between programme and project management systems

The framework addresses all these and provides a foundation for organisations to achieve higher levels of performance and maturity as it is complete and ready to go. The problem with many frameworks is that there is too much detail at points when it isn’t required, so we have built this portal to enable easy access to “just in time” information and guidance when it is needed.

We have used our experience of building and reviewing numerous frameworks to provide you with a framework which is based around a 4 layer data model:

<table>
<thead>
<tr>
<th>Level</th>
<th>Headline</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standards</td>
<td>What should be done?</td>
<td>What are the basic standards all programmes and projects should be compliant to?</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Lifecycle</th>
<th>When should it be done?</th>
<th>A common lifecycle that integrates programme and project management, with pre-defined business milestones, providing the basis for portfolio management and consistent project and programme planning.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governance</td>
<td>Who should do it?</td>
<td>Clear responsibilities, with specific tasks and advice for each of the roles during the lifecycle.</td>
</tr>
<tr>
<td>Guidance</td>
<td>How should it be done?</td>
<td>Just in time advice, with examples, at the moment when you need it. Examples, case studies, worked examples of complex techniques, example videos and advice from experts</td>
</tr>
</tbody>
</table>

## 2 Align Framework content

The framework includes the following:

1. **Themes**: there are 8 themes that are aligned with best guidance from all the bodies of knowledge in the market (APM, PRINCE2®, MoP®, MSP®), each theme includes:
   a. Set of standard statements that all programmes and projects should follow, which provide you with some ground rules
   b. Overview of each of the concepts within the theme, e.g. communications planning
   c. Explanation of the recurring cycle of activities associated with each of the concepts, namely:
      i. Identification
      ii. Analysis
      iii. Planning
      iv. Delivery
      v. Review
   d. A set of podcasts that provide overviews of concepts by thought leaders who have shaped the concepts
   e. Main activities associated with the theme and a table allocating ARCI¹ for each activity
      i. Pointers to specific examples
      ii. Over 60 pages of guidance and 15000 words

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¹ Accountable, Responsible, Consult, Inform
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2. **Lifecycle**: A lifecycle that covers portfolio, programme and project delivery. It enables the tracking of an idea from concept through to benefits release and refresh. Within the lifecycle there is:
   a. A set of 10 stages which provide the basis for Portfolio, Programme and Project delivery and control
   b. Each stage has 5 or 6 milestones that apply to all initiatives however big or small
   c. A separate set of stages for programme and projects lifecycles
   d. The common milestones provide the basis for progress tracking and reporting
   e. A task and guidance for each of the 8 themes at each milestone
   f. Specific tasks and support for each of the roles at each milestone
   g. Inputs and outputs to each theme task
   h. Around 140 pages of hierarchical lifecycle related guidance that is easy to access, but has depth - it includes around 40,000 words.

3. **Techniques**: are often underestimated. Programme and project management is common sense until you try to apply the techniques. Align comes ready loaded with 25 “how2guides” that explain each technique and give a practical example to kick start your performance.

4. **Templates**: are the starting point for many organisations, however, a well-designed framework requires a lot less as the thinking has been done. We believe that most project can provide on 3 core templates, however we can provide a full range of over 100 templates that meet your needs if you prefer a template approach, and of course your own templates can be built in.

5. **Discussion groups**: Each organisation receives its own discussion board to enable investigation on key topics within the organisation. It can also be linked to discussions with other customers of Align and the Aspire team to enable better knowledge sharing.

2.1 **Formats**
The framework can be provided in the following formats:

- **Hosted website** – we will provide you with a hosted portal, ready configured so you will be up and running immediately. It will have your logo on it and we will train you how to administer it so that you can add links to your own guidance, build your own themes and add or delete milestones and associated guidance.

- **Raw format** – we can provide you with a copy of all the data in Microsoft Word or Excel format. Some clients have chosen to load this into SharePoint and build swim lane diagrams to support their implementation.

- **Align for Verto** - Verto is the market leading portfolio management tool. The Align Framework can be ported into Verto so that you not only have the framework but the tool
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to capture the data and support reporting and tracking as well. This version will be available in early 2014.

3 How does this help?

The Framework has individual and organisational benefits.

Individuals involved in the delivery of programmes and projects are normally intelligent, capable and often are trained. What they need is practical advice to help them know what they have to do. We have therefore taken the view that advice and pointers are needed to apply the good practice concepts.

We include specific advice to the key roles about what their priority should be, the areas that they particularly need to think about to ensure they are delivering their individual responsibilities. The specific advice is targeted at the SRO, Programme Manager, Business Change Manager, Project Sponsor, Project Manager, Senior User and Senior Supplier. You can add, change or remove roles to fit your organisation’s preference.

It is possible to view a summary report of what each role is doing either for each the step, summarise an entire process or even the whole lifecycle. This can be presented as a handbook or quick reference guide for individuals as booklets or check sheets if required.

The Framework removes ambiguity and provides the guidance they need at the moment they need it. From a P3M3® maturity level perspective, Align provides an immediate maturity Level 3 framework.

The organisation can gain control very quickly. There is a standard journey that every programme and project takes, starting at the beginning and working their way through to completion. The lifecycle has gates built in, which provide the critical control points for the organisation.

The rate a programme or project progresses between the gates will vary greatly and as will their approach to moving through the lifecycle to ensure it has the flexibility they need. Your organisation may follow the steps in a different order, but by tracking the progress along the steps between the gates the organisation will be able to measure exactly where the programme or project has progressed to.

The control is achieved by the reporting templates using the lifecycle milestones to track the progress. It will be able to relate issues and obstacles being experienced in particular steps in the lifecycle enabling suitable support to be provided.

4 Customisation

The Align Framework comes fully loaded with guidance for each step of the journey and for each of the roles so you are up and running from day one.

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2 P3M3® is the leading framework for assessing and measuring organisational performance
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The radical opportunity that Align provides is that, once installed, you can take the standard content and align it with your own needs and examples at a rate that suits you. You have access to every field, so you can customise every piece of advice, including:

1. Add links to key pages that are important to you
2. Add new or change activities into the Lifecycle specific to your organisation
3. Add new roles or change the titles of roles to meet your organisational needs
4. Add new Themes that then appear in every activity
5. Add new Technique pages that provide dynamic support and guidance
6. Chose to include or exclude a role or Theme from each activity
7. Make roles, themes and activities live when you want to so that you can manage the release to the business.

Off the shelf you get a fully configured product ready to go - as you improve, you can add and change the guidance to improve your performance.

5 Retrofitting existing programmes and projects

One of the challenges when implementing a programme or project management system is to catch existing programmes or projects that are in flight and using their own local approach for delivery. These are normally quite resistance to change. Programme or project managers will baulk when asked to retrospectively provide information or complete templates that are seen as adding little or no value to them and consumes their own precious resources.

The solution is an informal review of the progress of each initiative to identify what assets have been created as part of the work already undertaken. The Align Framework sets out a clear journey illustrating what should be created as the programme moves through the lifecycle.

Once the evaluation has been completed, it can be aligned with one of the gates and any aspects of the lifecycle that have been missed can be identified and a timetable for resolution agreed, if one is needed.

6 How it saves you money

The Align Framework saves you time and money by improving your programme and project management performance quickly and efficiently.

6.1 Avoiding incremental development costs

Many organisations adopting P3M will develop a number of models and guidance in the early days. The developing of this guidance will often be ad-hoc and solve one problem whilst creating another.

Extensions are then created in a reactive way to fill gaps that are spotted during delivery, so can often be expensive and not interface effectively with existing guidance, so backward engineering is needed or a range of conflicting guidance exists around the organisation.
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The Align Framework avoids this waste by producing an integrated set of guidance. It avoids all the issues around consistency as it is a complete framework of guidance and templates delivered ready to go, based on a vast range of experiences across numerous organisational implementations.

Over time you will customise it for your own use, but you will be up and running immediately. Your main decision is the rate at which you release the framework; each element can be made live or kept offline depending on your level of maturity.

6.2 Creates a consistent approach
From the outset, each programme and project will follow a consistent lifecycle with a consistent set of guidance and tools. This avoids wasteful overlap and gaps appearing in the guidance that will need to be fixed later. The content is based on our experience of producing similar guidance for other organisations and sets you on the right track from day one.

When you work with partners or bring in contract or temporary staff, you will have a standard approach upon which to base all delivery, giving you better control and saving you money.

6.3 Improves control
By focusing on the lifecycle within the Align Framework and the associated reporting templates, it provides a transparent view of all projects and programmes. Within each stage there are key activities that all projects should follow, by using these it is possible to view the true progress at the level of detail traditional “handbooks” cannot offer. The framework has a set of streamlined templates that capture the important information, not the list of information the designer could think of.

Saving is the cost of delays or cost over runs resulting from lack of control, the reporting framework provides an immediate reporting template that will show where the programme/project is on its journey. Less time undertaking bureaucracy more time spent managing projects.

Underpins training by providing highly practical guidance based on the best practice concepts. This reduces the need for generic training such as PRINCE2® and MSP®, the Align Framework takes these frameworks and applies them, so the guidance is specific and acts as an online mentor to each role providing guidance for each. There is a supporting set of training courses with vocational accreditations that can be achieved by using the tools within Align.

Saving is through reduction in the cost of training by focusing on key skills and avoids the need for generic training, as the framework already includes specific practical advice.

6.4 Applies best practice
The relevant frameworks, principally PRINCE2® and MSP® are intentionally generic. Application of these frameworks is often poorly done, this is because people who develop them don’t have the experience to apply the concepts. The Align Framework has been developed by the teams who were involved in the development of the main best practice guidance. The Align Framework delivers the infrastructure for a level 3 maturity organisation and support you maturity improvements to levels 4 and 5.
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Saving is through the reduction in the time it takes to improve maturity and the costly learning path associated with this. CMMI numbers suggest 10-20% of cost benefit per maturity level.

**Improved knowledge management** the initial Align package comes ready built with applied guidance, so it is already much more specific than the well-known manuals. The framework comes with a full administration utility, which means you can capture your own lessons learned within the framework as you go along. The information within the framework will grow with the maturity of the organisation and provides you with a short cut to the basis of P3M3® level 4 maturity and performance. We also include a discussion board for your own organisation and access to other Align customers.

Saving is the performance gains by providing the communications infrastructure to disseminate lessons learned and guidance rapidly, providing the opportunity to enjoy P3M3® level 4 performance, saving a further 10-20% in operating costs.

### 6.5 Costs

The Align Framework comes in a number of packages which range from a vanilla implementation on the cloud with training, to a fully loaded package that includes support and training. Support options for cloud based solutions include development and maintenance.

Packages are configurable but our standard packages are as follows:

<table>
<thead>
<tr>
<th>Package</th>
<th>Bronze</th>
<th>Silver</th>
<th>Gold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programme &amp; project lifecycle &amp; guidance</td>
<td>One</td>
<td>Both</td>
<td>Both</td>
</tr>
<tr>
<td>Full set of How2guides</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Full set of Templates</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Module e-learning packages</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>2 days admin training</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>10 days configuration and admin support</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>P3M3 assessment</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Local discussion board</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>User community discussion board</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Cost</td>
<td>£8,000</td>
<td>£15,000</td>
<td>£25,000</td>
</tr>
<tr>
<td>Annual maintenance</td>
<td>£5,000</td>
<td>£15,000</td>
<td>£15,000</td>
</tr>
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Trade Mark statements

PRINCE2® is a Registered Trade Mark of the Cabinet Office in the United Kingdom and other countries
MSP® is a Registered Trade Mark of the Cabinet Office in the United Kingdom and other countries
P3O® is a Registered Trade Mark of the Cabinet Office in the United Kingdom and other countries
M_o_R® is a Registered Trade Mark of the Cabinet Office in the United Kingdom and other countries
P3M3® is a Trade Mark of the Cabinet Office
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