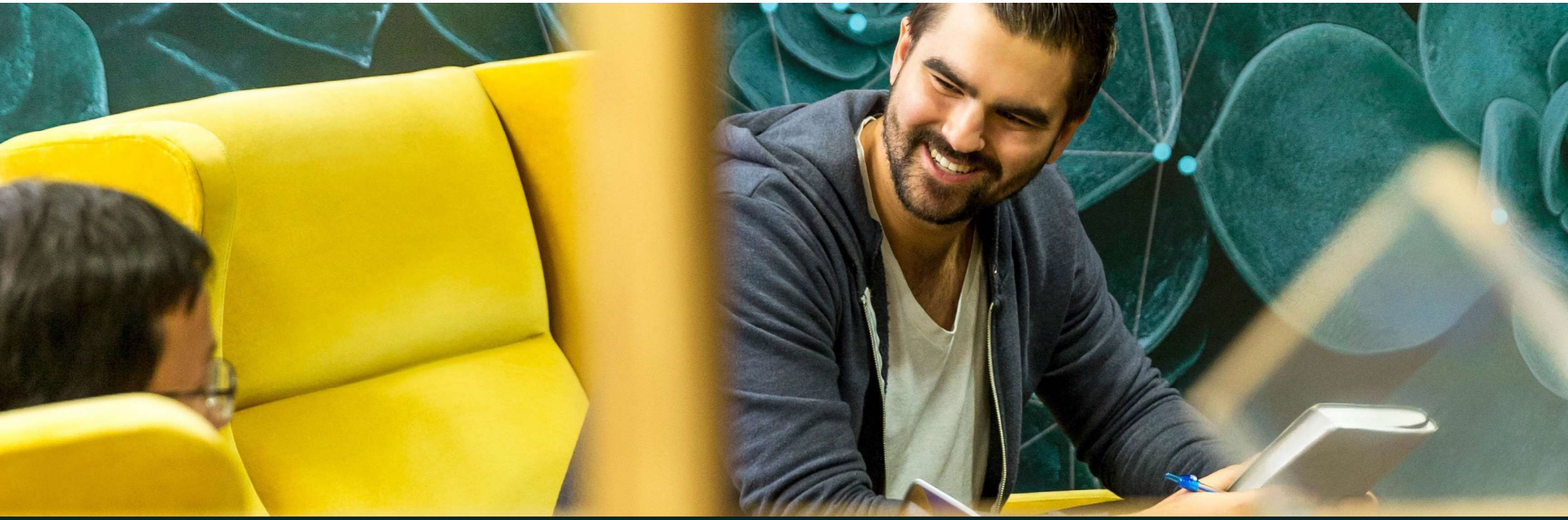


The Portfolio Management Personas

Key people and elements to running a successful portfolio management organization

odysseus

Portfolio Management Personas

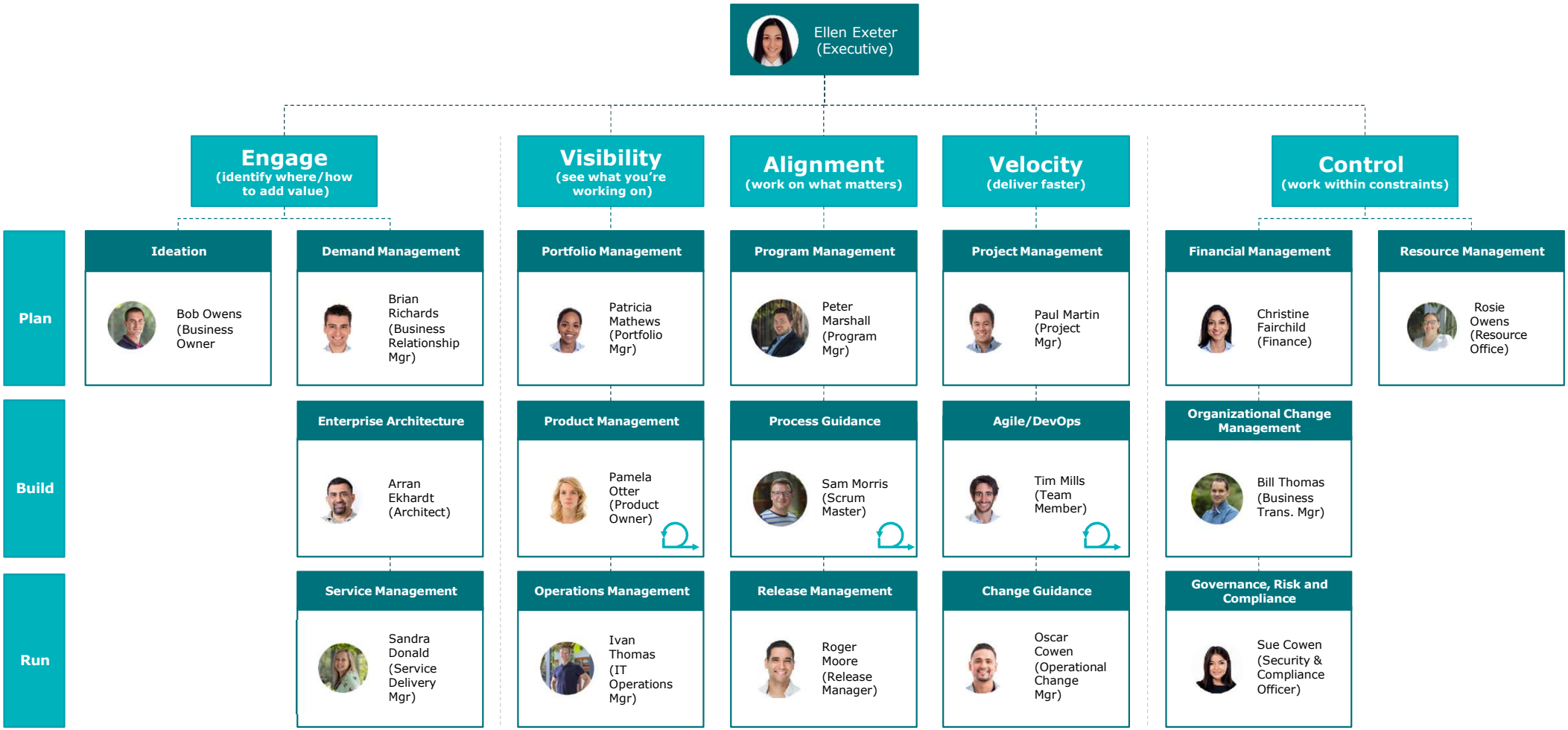
How to use these slides at a client site

- The Persona slides provide an overview of all the possible roles involved in portfolio management processes
- We've identified 18 personas based on Odysseus' extensive experience, best practices and industry standards
- Be aware that not all personas may be present or even necessary in every organization
- Also, personas may be called something different in various environments, or even have different duties and responsibilities
- How to read the slides:
  - What = describes the three key responsibilities a role has
  - Why = describes the key challenges faced by the role
  - How = each point describes a solution to a specific key challenge where Odysseus can potentially play a part in
- The Personal slides can be used as follows:
  - Odysseus clients have an overview of the roles involved in portfolio management
  - Odysseus consultants can guide clients through the most common roles and processes and get an idea of where we can add value to the customer's portfolio management challenges
  - Together, clients and consultants can engage via the slides and make this specific to the client's organization (things like persona names, duties, challenges, etc. can be changed to fit the client organization)
- The ultimate goal of the slides is to *Discover* (by both Odysseus and client) where to focus energy during implementation, which activities to prioritize, who to engage with, and to set up some sort of plan/roadmap for deployment

The Portfolio Management Organization

Who's involved in what?

- The portfolio management organization consists of a number of stakeholders (personas) that can potentially be impacted by new or changed (portfolio management) processes
- The personas are not part of the implementation team (per se) but are certainly stakeholders that you need to manage and engage with throughout the implementation; in some situations they may even act as SME's that provide valuable information for the desired changes
- Once the personas specific to a client organization and problem(s) are identified, you can focus OCM activities on these roles during each of the 5D's (think: workshop participation in Discover, providing input during Define, being present at demos during Design/Develop, and for training purposes in Deploy)
- The personas are grouped in various columns:
  - Engage = these roles are involved in identifying where or how to add value in the organization
  - Visibility = these roles are involved in providing visibility into what the organization is working on
  - Alignment = these roles are involved on enabling working on what matters
  - Velocity = these roles are involved in helping the organization to deliver faster
  - Control = these roles are involved in defining constraints under which development and delivery can take place


Ellen Exeter (Executive)
Engage (identify where/how to add value)
Visibility (see what you're working on)
Alignment (work on what matters)
Velocity (deliver faster)
Control (work within constraints)
Plan
Build
Run
Ideation
Bob Owens (Business Owner
Demand Management
Brian Richards (Business Relationship Mgr)
Portfolio Management
Patricia Mathews (Portfolio Mgr)
Program Management
Peter Marshall (Program Mgr)
Project Management
Paul Martin (Project Mgr)
Financial Management
Christine Fairchild (Finance)
Resource Management
Rosie Owens (Resource Office)
Enterprise Architecture
Arran Ekhardt (Architect)
Product Management
Pamela Otter (Product Owner)
Process Guidance
Sam Morris (Scrum Master)
Agile/DevOps
Tim Mills (Team Member)
Organizational Change Management
Bill Thomas (Business Trans. Mgr)
Service Management
Sandra Donald (Service Delivery Mgr)
Operations Management
Ivan Thomas (IT Operations Mgr)
Release Management
Roger Moore (Release Manager)
Change Guidance
Oscar Cowen (Operational Change Mgr)
Governance, Risk and Compliance
Sue Cowen (Security & Compliance Officer)

1. Who

- **Name:**
  Ellen Exeter
- **Role:**
  Executive
- **Area of Responsibility:**
  Strategy Definition/Project Alignment

2. What

Key Responsibilities:

- Defines strategy/goals
- Ensures strategic fit/alignment
- Maximizes (strategic) value

4. How

Benefits:

- Define steps needed to attain specific goals
- Use Balanced Scorecard to create the right mix of projects
- Get insight to project progress/status/value/BC

3. Why

Key challenges:

- Lack of clear direction and strategy
- Unsure how projects align to strategy and which to carry out
- Understanding if/when to terminate projects

1. Who

- **Name:**
  Bob Owens
- **Role:**
  Business Owner
- **Area of Responsibility:**
  Engage/Ideation

2. What

Key Responsibilities:

- Helps develop and realize strategy for own business unit
- Participates in idea generation and development
- Accountable for business value

4. How

Benefits:

- Align projects to strategy
- Utilize a benefits tracking process/system
- Clarify common vision/required solutions with key stakeholders

3. Why

Key challenges:

- Lack of insight to strategy realization
- Difficulty in measuring business value
- Unfulfilled business needs

1. Who

- **Name:**
  Brian Richards
- **Role:**
  Business Relationship Manager
- **Area of Responsibility:**
  Engage/Demand Management

2. What

Key Responsibilities:

- Acts as a liaison between business and IT
- Ensures value optimization
- Enables continuous improvement in all areas

4. How

Benefits:

- Increase awareness of stakeholders and their needs
- Enable IT to be more proactive
- Ensure that strategy is clear and that there is a deep understanding of value

3. Why

Key challenges:

- Low commitment from senior management
- IT organization seen as "order taker" instead of a strategic partner
- Insufficient strategic focus

1. Who

- **Name:**
  Arran Ekhardt
- **Role:**
  Architect
- **Area of Responsibility:**
  Engage/Enterprise Architect

2. What

Key Responsibilities:

- Designs enterprise architecture in line with strategy
- Sets guidelines for business and IT landscape
- Understands the impact of IT changes to the landscape

4. How

Benefits:

- Provide a technology roadmap
- Create transparency in delivery to match business priorities
- Visualize relationships between technology and business

3. Why

Key challenges:

- Tension between long vs short term plans
- Manageability of changes
- Alignment between technology and business

1. Who

- **Name:**
  Sandra Donald
- **Role:**
  Service Delivery Manager
- **Area of Responsibility:**
  Engage/Service Management

2. What

Key Responsibilities:

- Identify customer needs and oversee service delivery
- Ensure delivery commitments are being addressed
- Manage and proactively resolve escalated customer issues

4. How

Benefits:

- Easily measure service delivery performance and satisfaction
- Provide transparency using financial and consumption data
- Uniform SLA’s providing key data for analysis

3. Why

Key challenges:

- Incomplete overview of clients and services provided
- Difficulty with predictability of future capacity requirements
- Insufficient insight to Service Level Agreements (SLA's)

1. Who

- **Name:**
  Patricia Mathews
- **Role:**
  Portfolio Manager
- **Area of Responsibility:**
  Visibility/Portfolio management

2. What

Key Responsibilities:

- Aligns projects with strategy
- Facilitates decision making on initiatives and investments
- Monitors portfolio progress and constraints

4. How

Benefits:

- Utilize clear and uniform business case/project criteria
- Set up portfolio governance to facilitate review/decision points
- Create a single source of truth with regular project reporting

3. Why

Key challenges:

- Unclear which ideas/initiatives to initiate or stop
- Difficult to perform periodic stage/gate reviews
- Transparency in project data (progress, status, financials)

1. Who

- **Name:**
  Pamela Otter
- **Role:**
  Product Owner
- **Area of Responsibility:**
  Visibility/Product Management

2. What

Key Responsibilities:

- Understands business needs that influence development
- Defines and prioritizes stories for the backlog
- Maximizes the value of the products created

4. How

Benefits:

- Insight into product backlogs and priorities
- Insight into roadmaps and dependencies
- Stakeholder involvement in demos

3. Why

Key challenges:

- Timely involvement stakeholders
- Juggling all stakeholder needs and keeping everyone satisfied
- Managing and aligning all dependencies

1. Who

- **Name:**
  Ivan Thomas
- **Role:**
  IT Operations Manager
- **Area of Responsibility:**
  Visibility/Operations management

2. What

Key Responsibilities:

- Maintains business applications
- Provides transparency in IT Operations
- Seeks/launches improvements on the operations work

4. How

Benefits:

- Provide a prioritized roadmap
- Create insight to resource demands and capacity
- Improve lifecycle management processes

3. Why

Key challenges:

- Insufficient involvement and handover from projects
- Balancing business as usual with changing the business
- Out of support applications

1. Who

- **Name:**
  Peter Marshall
- **Role:**
  Program Manager
- **Area of Responsibility:**
  Alignment/Program management

2. What

Key Responsibilities:

- Organizes programs in accordance with organization strategy and goals
- Manages long-term goals
- Develops operating plan for program

4. How

Benefits:

- Create high level project plans
- Link project plans to highlight milestones/bottlenecks across the program
- Map strategic goals to benefits

3. Why

Key challenges:

- Complexity of the program
- Lack of integrated planning
- Unclear organizational strategy and goals and relationship to program

1. Who

- **Name:**
  Sam Morris
- **Role:**
  Scrum Master
- **Area of Responsibility:**
  Alignment/Process Guidance

2. What

Key Responsibilities:

- Ensures team lives by agile values and practices
- Removes impediments to ensure smooth value delivery
- Helps create high performing teams

4. How

Benefits:

- Employ Agile specialists to guide the transition at all levels
- Use metric to demonstrate true value delivered by teams
- Improve stakeholder engagement

3. Why

Key challenges:

- Lack of Agile knowledge
- Shifting mindset from waterfall to Agile
- Lack of commitment from senior management

1. Who

- **Name:**
  Roger Moore
- **Role:**
  Release Manager
- **Area of Responsibility:**
  Alignment/Release management

2. What

Key Responsibilities:

- Combines operations and project deliverables into releases
- Manages risk that may affect release scope
- Plans the release windows

4. How

Benefits:

- Create insight to project planning
- Overview of interproject dependencies
- Implement a single source of truth

3. Why

Key challenges:

- Scope creep
- Lack of visibility in dependencies of projects
- Comply with regulations and governance

1. Who

- **Name:**
  Paul Martin
- **Role:**
  Project Manager
- **Area of Responsibility:**
  Velocity/Project management

2. What

Key Responsibilities:

- Leads the project team
- Ensures that planning is met (schedule and budget)
- Reports on progress/status

4. How

Benefits:

- Demonstrate impact of scope changes on planning & budget
- Deploy a resource management process
- Provide frequent reports and demos to your key audience

3. Why

Key challenges:

- Frequent scope changes
- Availability of project resources
- Stakeholder engagement

1. Who

- **Name:**
  Tim Mills
- **Role:**
  Team Member
- **Area of Responsibility:**
  Velocity/DevOps

2. What

Key Responsibilities:

- Creates, delivers and maintains a solution
- Specifies and refines the technical solution based on functional requirements

4. How

Benefits:

- Appoint a Scrum Master to guide the team
- Ensure PO regularly communicates on vision
- Define clear responsibilities

3. Why

Key challenges:

- Agile not embedded in team (and organizational) culture
- Unclear product vision
- Governance and ownership can still be traditional

1. Who

- **Name:**
  Oscar Cowen
- **Role:**
  Operational Change Manager
- **Area of Responsibility:**
  Velocity/Change Guidance

2. What

Key Responsibilities:

- Handles the process of change
- Ensures employees and the organization are ready for change
- Defines change/deployment approach

4. How

Benefits:

- Engage stakeholders
- Create and communicate a clear deployment plan
- Set up a deployment calendar

3. Why

Key challenges:

- Resistance to change
- Unclear business benefits behind the change
- Lack of visibility in change schedule

1. Who

- **Name:**
  Christine Fairchild
- **Role:**
  Finance
- **Area of Responsibility:**
  Control/Financial Management

2. What

Key Responsibilities:

- Efficient accounting operations
- Develops performance metrics to measure and manage progress
- Identifies opportunities to optimize business processes

4. How

Benefits:

- Set up financial administration and reporting
- Single source of truth
- Introduce business case management

3. Why

Key challenges:

- Slow monthly close procedures
- Consolidated financial data
- Lack of actual or complete (financial) data

1. Who

- **Name:**
  Bill Thomas
- **Role:**
  Business Transition Manager
- **Area of Responsibility:**
  Control/Organizational Change Management

2. What

Key Responsibilities:

- Acts as main point of contact for managing change in the entire organization
- Builds transition plans
- Ensures operational readiness

4. How

Benefits:

- Translate vision/strategy into concrete goals
- (Re)define scope until benefits are clearly identified
- Focus on benefits as opposed to only cost savings

3. Why

Key challenges:

- Transitions are driven by visions of higher management
- Unclear business benefits behind the change
- Difficulty unlocking value from a transition

1. Who

- **Name:**
  Sue Cowen
- **Role:**
  Security & Compliance Officer
- **Area of Responsibility:**
  Control/Governance, Risk & Compliance

2. What

Key Responsibilities:

- Identifies and manages (regulatory) risk
- Ensures that an organization has internal controls
- Internal security policies and procedures

4. How

Benefits:

- Create security and compliance policies and procedures
- Cultivate a risk-based mindset
- Provide guidelines and be proactively involved

3. Why

Key challenges:

- Lack of compliance culture or management support
- Maintaining focus and priority for security topics
- Unclear compliancy requirements for projects

1. Who

- **Name:**
  Rosie Owens
- **Role:**
  Resource Office
- **Area of Responsibility:**
  Control/Resource management

2. What

Key Responsibilities:

- Hires and/or recruits resources
- Supports skills/career building
- Support Performance Management

4. How

Benefits:

- Initiate periodic review of resourcing to projects
- Overview of skills demand and availability
- Maintain resource overviews

3. Why

Key challenges:

- Resource allocation
- Matching of skills
- Lack of transparency