

Program and Portfolio Management Simulation

Part I: Program Management

Developed by Lilo Altali, MPA, PMP, CBAP

For Educational Purposes Only

Case Study Overview

Scenario:

Global Americana Trade (GAT) is a medium-sized global organization with 880 employees, focused on international trade and shipping. Until recently, it has had one Chief Executive Officer for twelve (12) years. In the documents folder, under the title “Fact Sheet,” you can learn more about GAT. The Board recently hired Danielle Simmons to lead the company. Danielle spent a few weeks “factfinding,” speaking with staff, and learning. She has identified many internal inefficiencies that are impacting productivity. She hired a well-known external consultancy, Boin and Company, to do some root cause analysis work. Their report highlighted the following issues:

- Poor relationship-building practices with vendors
- Accounting and finance practices are outdated and are resulting in a waste of time and resources
- The finance department is structured in a way that delays payments, creates bottlenecks, and unnecessary chains of command

You can see the full report of finding by Boin and Company in the “Documents” folder. The firm also noted that most of these are issues related to technology. Danielle met with the Board and her senior leaders in an all-day retreat in June, and they came up with three strategic objectives to resolve the problems the consultants identified. Priya Desai, the Chief Strategy Officer, facilitated an exercise to develop the benefits, outcomes, capabilities, and outputs for each objective. Those can be found in the “Documents” folder, titled “Strategic Objectives.” Danielle also noted that she would be more comfortable taking on more risks once these organizational objectives are met.

Jose Rodriguez, the Chief Operating Officer, facilitated the group by coming up with an action plan. The action plan first suggested that three project managers be hired to oversee the three strategic objectives. Danielle pushed back and requested that a program manager be hired to “hold the whole,” and they can best determine how to realize the benefits of these strategic objectives. Since the organization doesn’t have a PMO, it was agreed that the program manager would report to Jose since the strategic objectives were much to do with operations and finance. Periodically, the program manager would need to give status reports to the whole leadership team, including Danielle.

Your Role:

After two rounds of interviews, you have been chosen for the Program Manager role. Congratulations! You will have access to a “Documents” folder to do some factfinding and try to make meaning of the information thus far. Your supervisor is Jose Rodriguez, and any memo should be addressed to him. Keep in mind that other members of the leadership team might email you. Appendix A outlines your job description. Upon your first check-in with Jose, you agreed to a tentative schedule of deliverables, which is also found in Appendix A. Jose and the other senior leaders have compiled templates and resources that might be useful to you and placed them in the folder titled “organizational assets.” For this program, it was agreed upon that Jose would serve as your Program Sponsor.

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Appendix A
Job Description and Expectations

Job Title: Program Manager
Reports to: Jose Rodriguez, COO
Salary: \$95,00-120,000 USD, commensurate with experience

Responsibilities and Duties:

- Planning and monitoring program execution
- Creating and managing a budget
- Project coordination and managing project interdependencies
- Oversee the realization of benefits and strategic objectives
- Create the necessary program documentation such as business cases and program charters
- Stakeholder communications, negotiations, and problem-solving
- Aligning or realigning deliverables with program outcomes
- Provide status reports as needed
- Provide feedback to strategy formulation
- Hire, supervise, and terminate if necessary project managers
- Cross-project resource management
- Identifying and addressing problems and risks
- Other tasks might be assigned.

Email from Jose – Follow up to first check-in!

From: Jose Rodriguez <j.rodriquez.gat.org>
To: Program Manager
Subject: Follow Up

I am so excited to have you on board! I think you will add a tremendous amount of value as we navigate our new organizational strategy. Since this is a new role for the organization, I want to make sure we are doing all we can to support you and set you up to succeed. Per our discussion today, I wanted to follow up with the expectations and deliverables we agreed on.

Expectations
Week 1 - Review all the documents and make meaning.
Week 2/3 - Complete the following deliverables, with the data you have, to the best of your ability: -Benefit realization plan -Benefit register -Business Case
Week 3/4 - Complete the following deliverables, with the data you have, to the best of your ability: -Program brief

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-Program Component List -Program Roadmap -Program procurement standards
Week 5 - Complete the following deliverables, with the data you have, to the best of your ability: -Governance framework
Ongoing: Complete the following deliverables, with the data you have, to the best of your ability: -Check-in with governance team and gain approval
Closing of Program: Complete the following deliverables, with the data you have, to the best of your ability: -Benefit Transition Plan*

*A program would never be closed so fast after its inception in the "real world," but we will close it in this case to demonstrate the program management competencies.

If you have any questions, please don't hesitate to contact me.

Best,
Jose