

This year's Gartner Fall Symposium/ITxpo – held from 3rd to 7th November in Cannes, France – was organized around the theme of IT and the economy. This report offers an overview of what was on attendees' minds and what they learned from Gartner analysts and each other.

KEY TAKE-AWAYS

During the opening keynote at Fall Symposium, Gartner Fellow Richard Hunter told attendees that projects must deliver business performance improvements. "Look at every project with the same mind-set, starting with the business and working back from there. Ask, 'Do you have the right team, the right capabilities, and the right technology to deliver?' Decide what needs to be spent, not just what needs to be cut," he said.

Program and Portfolio Management (PPM) leaders should not let the economy scare them into inaction, according to Matt Light, Research VP, PPM (see RN #G00155258, "Preserving Projects in Tight IT Budgets"). This sentiment resonated throughout the week in the PPM track, where attendees were given tools to help them read between the lines and maintain good practices and decisions throughout the economic downturn. PPM leaders focused on portfolio management and prioritization strategies, in particular.

CONFERENCE HIGHLIGHTS

Gartner Magic Quadrant: IT project and Portfolio Management

In the middle of the Exposition Marketplace, almost 40 people gathered to hear about Project & Portfolio Management (PPM) applications. In a presentation featuring the Gartner Magic Quadrant for PPM tools, Matt Light, Research VP for PPM at Gartner, described the shifting market demand and directions, positioned the vendors in the market, detailed market growth, and emphasized the importance of organizational process change in conjunction with any tool implementations.

PPM Maturity: Walking the Walk

CIOs and senior IT executives choose to invest in PPM to achieve clear and consistent communication with business executives, to gain an overview of commitments and plans and to improve resource management and facilitate prioritization. This session introduced Gartner's PPM maturity model, which is based on five dimensions: people, PPM processes, technology, financial management and relationships. The model emphasizes processes and relationships over technology and numbers.

Recommendations:

- Assess your current level of maturity. The key is to bring your PPM initiatives to maturity in ways that are achievable from your current state. Do not assume that the highest level of maturity is a "one size fits all" goal.
- Develop a plan for processes and tools to address your immediate needs.
- Match tools to your level of maturity – too much sophistication and complexity can defeat your purposes.

Scenario for Program and Portfolio Management Leaders: Small Steps and Quick Wins

The appropriate way to support management of projects, programs and portfolios tends to be different depending on an organization's maturity level and culture. This session introduced Gartner's PPM Activity Cycle and provided targeted advice for improving the full spectrum of project-based activities, from defining investment opportunities, to selecting the right initiatives, to project execution, to creating and monitoring project portfolios. The presentation highlighted tools that project managers can use to define and prioritize projects and communicate business value.

Recommendations:

- "Just enough" should be the mantra of PPM leaders – just enough process, data and standards to make the organization more effective. Too much leads to frustration and paralyzing levels of administration.
- Empower project managers to "fail fast" to succeed. Project managers need to help the organization make appropriate and timely risk-based decisions about the projects they work on, not blindly execute project plans.
- Define and select project opportunities based on visible and transparent processes. This ensures decisions will be defensible and correctable.

Workshop: Project and Portfolio Management Challenges: Executing Change and Evaluating Priorities

About 50 IT leaders attended a workshop to identify their key challenges in PPM. Participants worked with Gartner analysts and their peers to describe ideas, practices, new approaches to address these challenges immediately, within six months and further into the future.

Prioritization of investments was the most important topic for the majority of PPM workshop attendees. Prioritization challenges included dealing with business conflicts, prioritizing with the business, reporting and assessing on progress and status, governance and control, the process of benefits realization and assessing the business value of projects. The group determined that having control over the information collected and how it is presented to the organization and executive management provides quite a bit of control over the story that gets told and how it is received. This provides an excellent platform for change efforts. The group proposed a series of solutions including:

- Implement a business value vs project feasibility approach – and cross reference it with you "must do" and what you "could do". Take note of variations for small tactical projects, infrastructure and change management
- Develop a prioritization model with clear metrics and scoring, and communicating it throughout the organization.
- Establish the process of defining benefits, link and assign it KPIs and keep regular measures.
- Understand skill bottlenecks and develop an ability to forecast resource capacity by tracking progress against current projects, so as to predict future availability
- Implement a governance board – ensuring the right people are involved, looking at the right information, with clear scope and decision rights
- Manage the dependencies and the business partnerships

PMO: Meeting the Needs of All Your Constituents

The project/program management office (PMO) has three groups it needs to satisfy: executives, project managers and extended stakeholders. Getting the right mix of activities to keep everyone happy takes some balancing and creativity. While PMOs play a large part in project success, fewer than half are considered very successful. This is often because PMOs' methods, processes and practices don't match their maturity, or because they struggle to meet demands from multiple stakeholders. In addition, PMOs can often find it a challenge to build a project culture within organizations that reflect role, familial or networked-based cultures.

Recommendations:

- Assess your corporate culture to identify if you have a true project culture and to ascertain what you will need to do to build one within which the PPM practices can operate if you're not there already.
- Shift the project organization toward a focus on value to sponsors and stakeholders as opposed to process and compliance.
- Work on capturing tacit knowledge through communities of practice and lessons learned.

KEYNOTES

Welcome Address and Analyst Keynote

There are no easy or safe decisions in the next year – get over it. Be smarter, conquer your fear and make the hard choices. We are in a new age in which IT is still essential – but so is change. Gartner recommends you take action now; examine your inventory, rank it to find your priorities, question everything you have, protect your key people who can deliver your priorities, reconsider each budget line, plan for multiple futures and then choose where to cut AND where to spend.

IT is very good at acquiring systems but it's time to learn how to "manage what you have." Use this opportunity to move from the accidental legacy architecture you have inherited toward a 21st Century sustainable architecture. Use the downturn to modernise and prepare for the return to growth; remember this is your chance to get executive support for the change process so you can do what's necessary.

It's also time to innovate. It's time to "learn to let go" instead of always seeking to control and stamp out user driven innovation and technology choices. Find the opportunities for reinvention. By cultivating innovation and recalibrating your awareness of where differences can be made you will be able to drive down costs and harness new ideas. You need to upgrade or you risk lower speed, lower power and performance than more agile competitors. Do rationalise your portfolio but be careful! Exploit commoditization, use the cloud, and leverage partners where appropriate. Take stock and decide what you need – and what you can change. We live in interesting times; it's time to focus, it's time for courage, it's time to get started.

Mastermind Interview: Ian Livingston, CEO, BT

For the next year, things are going to be tough across the business world. The key message from Ian Livingston, CEO of BT, is you should plan for it – being prepared won't harm you. No one is recession proof. No one is going to escape the present climate unscathed. Companies should be looking at both the top and bottom line simultaneously, to cost cutting as well as continuing to seek opportunities for revenue growth.

Remember that in this difficult time the need for green IT is not going to go away. And with innovations like telepresence and virtualization, it isn't a case of paying for green IT at the expense of the business. Green IT can and does save you money if approached sensibly, and is something customers want to be a part of.

Reducing headcount is definitely going to be one of the core approaches CEOs adopt; it's inevitable. When talking to its customers, BT is finding that they are examining costs and looking to refocus on higher

growth regions of the world. The opportunity for IT is to streamline the bureaucracy and to move to a position where the CIO and the key IT management are change leaders and change enablers contributing to overall business efficiency and effectiveness.

Radical moves in the name of cost cutting are not the right approach. Use technology and process to reduce failure, work on increasing agility and ensure customer experience is at the forefront of each decision. This has to be the answer; making the organization more able to realize opportunity and deliver to customers more effectively. Don't force people to use new technologies; think about where social networking technologies, cloud computing, Software as a Service (SaaS) and remote working can make life better for the business and for employees and use the technology to serve those ends – make people want to use the new approaches.

Mastermind Interview: Steve Chambers, CIO and Valerie Dias, Executive Vice President, Chief Risk and Compliance Office, Visa Europe

In the main, "How do we get Business and IT to work effectively together?" is a constant question. According to the Visa Europe we should stop asking the question altogether as the divide between business and IT does not exist unless you create it. In Visa, they have formed joint project boards and everyone is encouraged to continually ask "why?" It's vital to identify, in clear business terms, the purpose and goal of a project. Success must be measured in business terms – how will the project positively impact the business?

It's important that everyone understands that they are all part of the one organisation. Creating trust at all levels across the business and within IT is critical. Visa ensures this by having an IT directorate embedded throughout the organisation. All project teams should ask the "why?" question when they are asked to undertake a project. This close relationship between business and IT can be the key to achieving competitive advantage. If IT is not closely aligned to the business, a gap is created that will add unnecessary risk, time, complexity and cost to a project. A key objective for any CIO should be to minimize this gap.

Overcoming scepticism can be a difficult hurdle. Leaders need to be firm in their beliefs, demonstrating on a practical level that their ideas and solutions can work. This process may take some time, but over time, behaviours and attitudes will begin to change. Success breeds change, which in turn breeds more success. Leaders need to have a sustained vision and purpose to ensure this.

People, politics and personalities are often the root cause of conflict. Conflict can, however, be useful, so long as it is focused on solving the challenge and moving forward. But when conflict becomes about entrenched positions and blame, then it benefits no one.

If you can't articulate the value of technology spend... then all you are doing is spending money. Always, always, ask "why?"

