Strategic Management System
A Case Study

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This is a case-study of how a water utility revised its strategic management process utilizing key project and portfolio management principles. The new system integrates planning, budgeting, performance management and project management.
- Focus on planning
- Basic performance management system
- Centralized strategic system
- Limited upfront planning
- No alignment with budget process
- Limited alignment between “Action Items” and strategic priorities
- No Project Charter
Develop and implement a strategic management system

- Focus on execution utilizing project management practices
- Time for upfront planning
- Alignment with budget process
- Portfolio-based planning
- Project Charter for each strategic project
- Focus on benefits / program evaluation
New Strategy Pyramid

- **Vision**: What we want to be
- **Mission**: Why we exist
- **Core Values**: What we believe in
- **Strategic Priorities**: What our game plan will be
- **Objectives and Measures (Performance Management)**: What must we achieve and how do we know if we are achieving it
- **Strategic Initiatives (Planning, Budgeting & Implementation)**: What we need to do (and how we fund it)
- **Personal Goals (Performance Management Program - PMP)**: What I need to do as an individual
WSSC Strategic Management System

Strategy Formulation
- Vision
- Mission
- Core Values
- Strategic Priorities

Strategy Implementation
- Project Initiation
- Project Planning
- Project Execution
- Project Closing

Strategy Evaluation
- Objectives
- Measures
- Monitoring & Reporting
- Decisions & Actions

Results
- Customer Outcomes
Key Outcomes of New System

- An effective corporate governance model
- A portfolio-based planning process
- Projects and programs that support strategic priorities
- Focused, quantifiable outcomes
- Aligned individual and organizational goals
- Tools for managing programs and projects
New System - Process View

- **Vision**
- **Mission**
- **Core Values**
- **Strategic Priorities**

- **Performance Management (KSMS)**

- **Requested and Suggested Projects**

- **Recommended Projects**

- **Funded Projects**

- **Portfolio Decision Criteria**

- **Budget Decision Criteria**

- **Strategy Formulation**
- **Strategy Evaluation**
- **Strategy Implementation**

- **Closing**
- **Execution**
- **Planning**
Strategic Management System - Old Process

Budget Summary/Final New and Reinstated Forms

Team and Offices

Budget Office

New and Reinstated Forms

Portfolio Teams

Final Greensheets and Pinksheet

SSMO

Greensheets

Portfolio Recommendations

Portfolio Recommendations Memo

GMO
Strategic Management System – New Process

- Budget Package (Annual Workplan)
- Budget Office
- Annual Workplan
- SSMO (GMO Initial Review)
- Annual Workplan
- Team and Offices
  - Ideas and Suggestions
  - Portfolio Recommendations
- Portfolio Teams
  - GMO
Initiation

- **Jan**: Fiscal Year Kickoff
- **Feb**: Annual Workplans (Draft)
- **March**: Portfolio Meetings
- **April**: Budget Planning
  - Finalize Workplans
  - Update KSMs
  - Prepare Budget Requests
- **May**: Budget/Workplan Meetings with the GM
- **June**: Budget Submission
- **July**: Update Workplans
- **Aug**: Portfolio Debrief
- **Sep**: Finalize Workplans
- **Oct**: Update Workplans
Planning

- Goal-setting for employees
- Update plans as needed
- Submit budget reallocation requests as needed

- Debrief
- Refine scope and create project schedule
- Complete workforce planning
- Conduct resource planning session
- Complete risk planning
Execution

• Support and monitor key projects as needed (SSMO)
• Direct and manage project execution (project teams)
• Develop new system, process or product (project teams)
• Monitor and report performance
Monitoring & Controlling

- Support and monitor key projects as needed (SSMO)
- Direct and manage project execution (project teams)
- Develop new system, process or product (project teams)
- Monitor and report performance

- Developing project closing report
- Archive project documentation
- Submit final Workplans

- Measuring the ongoing project activities
- Monitoring the project variables (budget, issues, risks)
- Progress reports
Closing

- Develop project closing report
- Archive project documentation
- Submit final Workplans

- Support and monitor key projects as needed (SSMO)
- Direct and manage project execution (project teams)
- Develop new system, process or product (project teams)
- Monitor and report performance
Tools and Templates

- Annual Workplan
- Project Charter
- Project Status Report
- Project Management Plan
Lessons Learned

- Keep it simple – phase-in
- Seek leadership support early
- Obtain cross-functional involvement
- Seek participation from various levels in the organization
- Show the …WIFM
- Build on what exists
- Communicate often