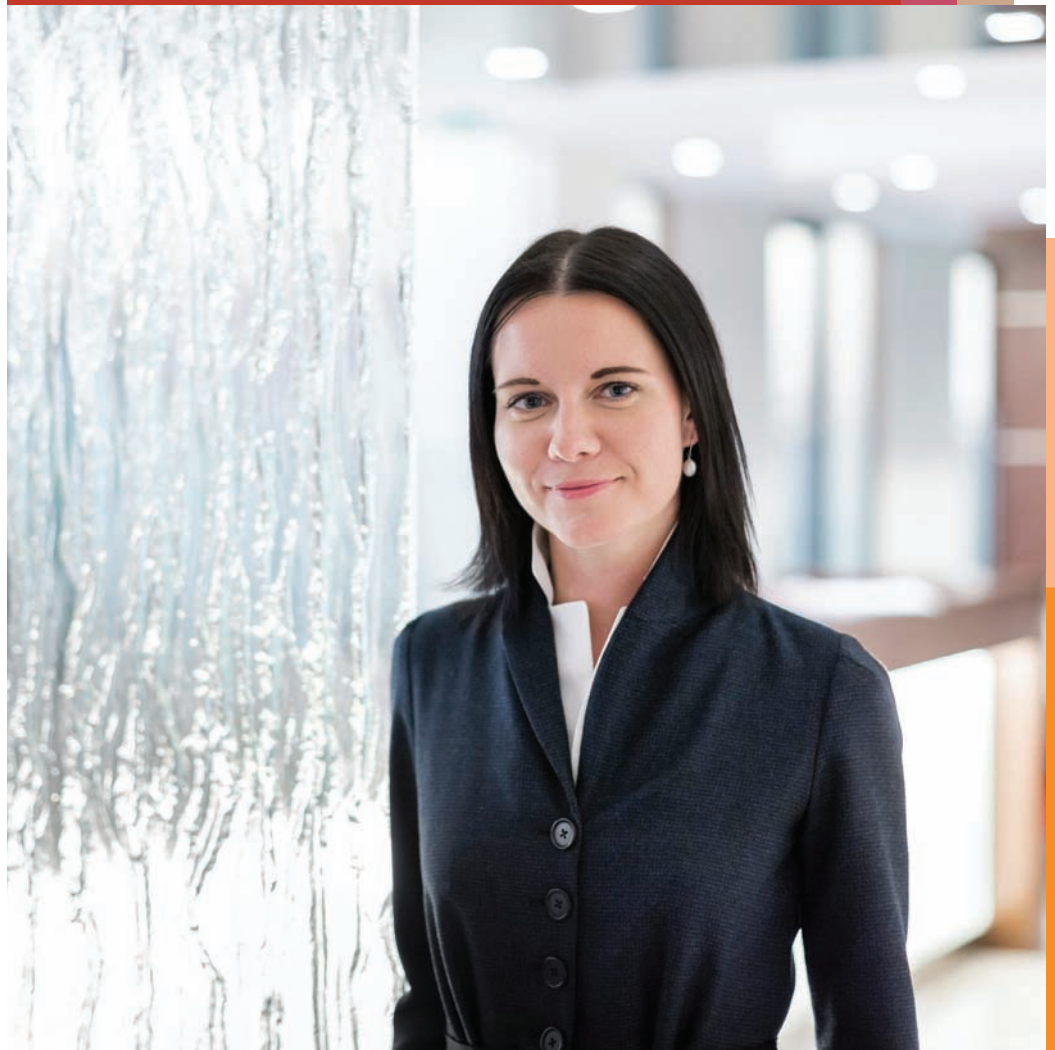


# *When will you think differently about programme delivery?*

*4th Global Portfolio  
and Programme  
Management Survey*

*September 2014*



# Introduction

Welcome to the findings from the 4th PwC Global PPM Survey looking at the latest trends, challenges, opportunities and opinions relating to the management of portfolios, programmes and projects.

With the world moving at an ever faster pace, driven by innovation and collaboration, CEOs told us that to keep up with the world they will need to change – and fast. While most CEOs recognise the need for change many concede that their organisations need to be far more agile when executing their strategies in an ever changing environment.

Great execution depends on many factors but often boils down to getting the basics right such as having a strategy being underpinned by a really clear plan and a thorough understanding of how that plan can be delivered to specification, on time and to budget. But this is also where things often go wrong as demonstrated in many of the survey findings.

We commissioned this fourth global survey as our previous results have shown that there are many challenges to delivering change successfully and most organisations are not doing it well enough.

We particularly wanted to know:

*‘Do people who commission change get what they want?’*

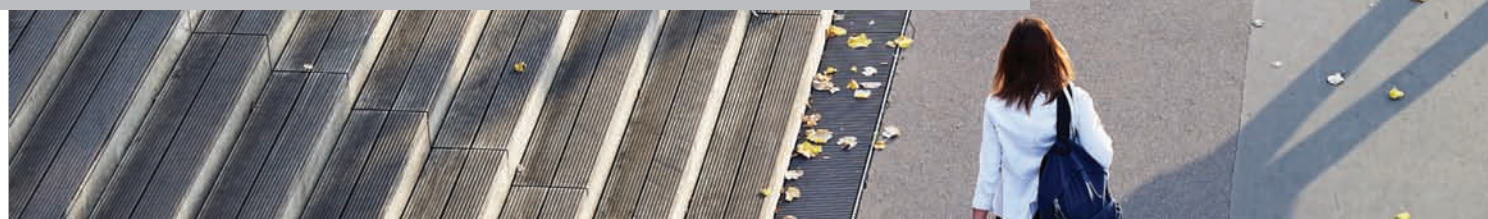
The results are both interesting and enlightening at the same time, especially when considered with the findings of our previous surveys, and also with the results that we find when we undertake maturity assessments around the world on our clients’ programmes. These latest survey findings provide a fresh perspective for Executive Teams, and will give PPM professionals evidence from which to re-evaluate their priorities and approach to delivering successful change programmes.

Read, digest and consider how embracing the findings can help you deliver your portfolio of programmes and projects more effectively to support transformational change.

Thank you for taking the time to consider the results, but mostly thank you to the 3,025 respondents from 110 countries and numerous sectors – without whom this report would finish here!



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# 4th PwC Global PPM Survey

## Foreword

It is not necessarily *what* organisations do but *how* they do it that makes them successful and establishes their competitive advantage. When it comes to projects, programmes and portfolios, the No. 1 differentiator is strategic initiative management. You can't produce better results without better execution.

As this report makes clear, many organisations need to look long and hard at how they are managing their most important strategic initiatives. This self-examination includes “the basics” — from planning and budgeting to prioritisation and risk management. But it also requires pushing the envelope and considering new ways to get things done faster and more efficiently.

Organisations must pave the way within their cultures to truly embrace the profound changes that all strategic endeavors bring. To accomplish this, organisations need to do several key things differently and better.

It starts at the top, with executive management. It is not enough for leaders to ask for change. They must invest in it.

They can't just leave their ideas echoing at the declaration stage. They must meaningfully connect strategy to capability. They must foster an environment that not only encourages flexibility and innovation but rewards it. Ultimately, they must develop and support the project, programme and portfolio teams that will turn their ideas and vision into real results.

It continues with talent — the project and programme managers on the front lines who lead the people that deliver the strategy. These leaders need the latest training and tools, structures and processes. But of equal importance, they need to be able to adapt these tools and approaches, demonstrate confident leadership, and apply strategic business acumen to meet the unique challenges that they face on a day-to-day basis. They need to become project executives.

Change is happening everywhere, faster and fiercer than ever before. Markets and industries are changing overnight. Technology is evolving exponentially. New competitors are emerging every day and old ones are disappearing.

Why does one organisation survive and the other slide into irrelevance? Why does another organisation not only survive but thrive? The answer, again and again, can be linked directly to how they implement their projects — the place where strategy lives and breathes. And the answer always seems to conclude with how they prepare for and manage the change that accompanies these initiatives.

This comprehensive report offers a number of insightful highlights that affirm a great deal of the recent research we have conducted at Project Management Institute. Read these recommendations and consider how they relate to your realities. But don't stop there. Do something with these findings. Do it now.



**Mark A. Langley**  
President & CEO,  
Project Management Institute

# Summary findings

## **The case for doing things differently**

CEOs believe that keeping up with the rapid pace of change is one of their most demanding challenges.

In times of rapid change there is a cost to standing still.

There is a need to develop new and innovative ways of delivering strategic outcomes, which means leading and delivering change programmes differently – faster, flexibly and more reliably.

**The Global PPM Survey shows that some familiar issues have not been addressed.**

Little has changed in the past 10 years in the way programmes are delivered, the issues faced and the results achieved.

As well as doing the basics more effectively something needs to be done differently to improve results.

The Executive Team and PMs need to act now to do things differently and learn from lessons of the past.

**The Global PPM Survey illustrates that there is often a disconnect between the Executive Team and PMs.**

Data would suggest that engagement is too often superficial – there is a disconnect between Executive Teams and those leading and delivering programmes.

An opportunity exists for PMs to play a bigger role in leading and delivering their services – to connect better with the Executive Team, and vice versa.

This report addresses how organisations can increase the times they can say ‘Yes’ to the question:

*‘Do people who commission change get what they want?’*

So it is time to take a different approach to delivering effective programmes that help organisations cope with the rapidly changing world.

## **Five themes for doing things differently**

Five themes emerge from the Global PPM Survey that could make a real difference to the success of programmes in terms of ‘doing things differently’:

### **1. Optimise your portfolio to maximise return**

If you are not making decisions using objective criteria and quality data, then how are you doing it?

Using a clear methodology removes ‘gaming’ from the prioritisation process and selection of change programmes. A reduction in ambiguity would help ensure that the most important strategic programmes are prioritised.

### **2. Be flexible, change faster**

As new business and programme challenges arise how can PMs help their organisations adapt quickly enough?

Be more flexible in approach – be brave, and well informed.

### **3. Enable your people to deliver success**

Structure, process and planning help, but it is people that deliver programmes – why don’t they do it really well, more often?

Enable your people to deliver for you by providing the right resources, training and tools.

### **4. Connect the Executive Team to programme delivery teams to get the change you want**

Why aren’t the Executive Teams more closely aligned with those delivering programmes?

Results will improve if there is a closer understanding and working arrangement.

### **5. Measure and address the harsh facts to maintain direction**

If you aren’t spotting the tricky problems as they arise how can you manage them?

Programmes must measure progress, identify risks and tackle the difficult issues, changing course where necessary.

# The case for doing things differently

## To remain effective PPM professionals need to drive and keep up with the pace of business change.

In the 2014 PwC CEO Survey CEOs state that keeping up with the rapid pace of change is one of their most demanding challenges.

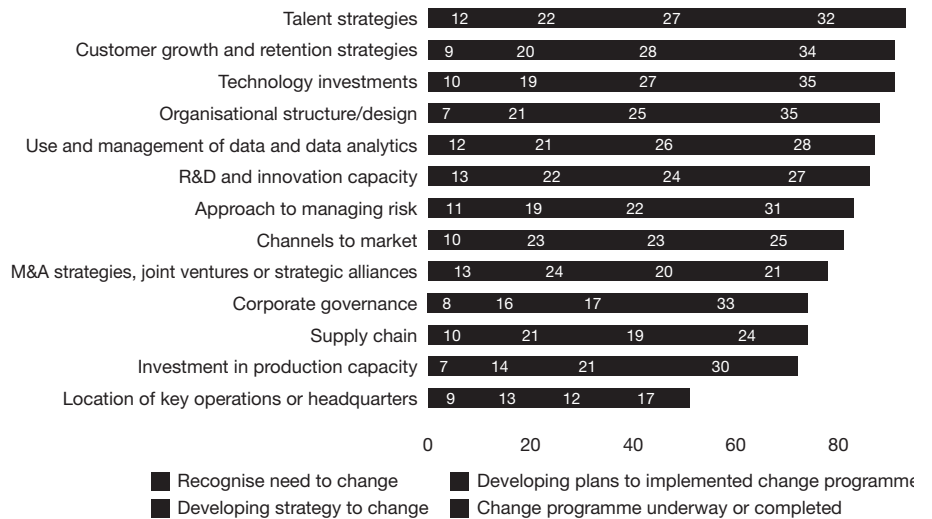
However you choose to look at the facts, the undeniable issue is that markets are becoming increasingly disrupted due to economic and demographic shifts, as well as the growing digital economy and changes in the characteristics and expectations of customers. By 2020 there will be nearly 7 times more networked devices than people in the world.

CEOs told us that they are responding to these factors by rapidly transforming all aspects of their organisation.

CEOs also told us that to keep up with the world they will need to change their cost structures, organisational design, technological investments and supply chain rapidly. That will require organisational change and effective programme management.

At least 75% of the CEOs either recognise the need for change, have plans for change, or have already started making changes, in most areas of business.

## Many organisations have plans for change across many areas of their business in response to the rapid changes happening globally.



Base: All respondents (1,344)  
Source: PwC 17th Annual Global CEO Survey

However, with increasingly uniform access to market intelligence, customer insights and strategic advice, the difference between winners and losers comes down to their ability to execute. Those who execute faster and better are positioned to capitalise on the changes and thrive.

Most CEOs concede that their organisations are not well prepared to execute. So, if CEOs don't feel their organisations are ready for change what will they do about it – how can they prepare for the road ahead more effectively?

Organisations must embrace a shift in their organisational planning and execution processes in order to improve their overall 'adaptability' in order to satisfy rapidly changing customer needs.

The traditional ways of delivering programmes may not be fit for purpose in this fast paced world. Executive Teams need to develop new and innovative ways of delivering change programmes to more consistently get the change they commissioned which also means measuring their success so they can equate it to their desired strategic outcomes.

The five themes that have been identified for improving programme delivery rely on both the Executive Teams and PM community taking a different approach. Only by working together in partnership can improvements be made to the extent that they will be able to deal with the pace of change.



*Portfolio management is about doing the right things.  
Programme and Project management is still about doing things right.*

### **Some familiar issues have not changed in 10 years**

Some important issues have not changed across the four surveys undertaken by PwC over the past 10 years. Most of them are basic project management elements – poor estimates, changes in scope and poorly defined goals and objectives have always been among the top reasons why projects overrun. Either scoping and estimating are not being carried out effectively or this is not being taken seriously enough across organisations. Something needs to be done differently to resolve this trend.

Essentially there are two things that PM professionals can do differently to encourage organisations to improve the success of programmes:

**1. Get the basics right on a more consistent basis. It is everyone's responsibility, to get these things right – without strong leadership and good teamwork programmes will continue to be blighted by frustrating failures that could be avoided.**

- Portfolios, of programmes and projects, need to be more clearly aligned to the organisation's strategy.
- Plan more effectively at the outset of programmes – scope and estimates should be experiential and metric driven, validated by subject matters experts, and subject to significant review cycles before being accepted.
- Programmes must be resourced with properly skilled professionals – the right capacity and capability, and forming a team whereby the dynamics help successful delivery.
- PPM is a profession – Training PMs effectively will improve delivery success.

### **Top three reasons for project failure – regular themes since 2004**

2004	2007	2012	2014
Bad estimates/ missed deadlines	Bad estimates/ missed deadlines	Poor estimates in the planning phase	Poor estimates in the planning phase
Scope changes	Scope changes	Lack of executive sponsorship	Change(s) in scope mid-project
Changes in environment	Insufficient resources	Poorly defined goals and objectives	Insufficient resources

- Good communication is more than providing a top down briefing session.
- Post project lessons learned should seriously examine where scope or estimates went wrong, and a feedback loop put in place to improve this aspect.

**2. Develop different ways of delivering programmes.**

- **Optimise your portfolio to maximise return** – the Executive Team need to make decisions about their programme portfolio using objective criteria and quality data. We often see organisations using subjective information or making decisions based on political will and commencing programmes that should have never started in the first place – guessing is not a strategy for change.
- **Be flexible, change faster** – organisations need to create plans that embrace change, deliver results faster and be ready to make brave decisions at short notice. That could even be to stop or pause the programme.
- **Enable your people to deliver success** – it is acknowledged that people deliver programmes, not just processes, plans or systems.

Yet supporting mechanisms are often designed with functional outcomes in mind. Organisations need to provide training that works, not just certifications. And they need to acquire the right tools to enhance programme deliverables, not just upward information flow. Finally organisations need to establish environments that allow people to focus, allow them to feel like a team and generate their best creative and innovative ideas.

- **Connect the Executive Team to programme delivery teams to get the change you want** – improving the communication and interaction between those that sponsor change and those delivering it will reap benefits. However it must be done in the right way, at the right times and there must be collective responsibility for success.
- **Measure and address the harsh facts** – organisations need to identify simple metrics that are hard to ignore in order to highlight the harsh facts of non-performance throughout delivery. Many go overboard at the start of programmes but eventually stop measuring any benefits at all. These then have to be tackled of course, not ignored.

# The case for doing things differently

## The Global PPM Survey illustrates that there is often a disconnect between the Executive Team and PMs

The results of the survey indicate a difference of opinion and approach between the Executive Team and the staff responsible for delivering or engaging in programmes of change. Engagement is often superficial.

People across an organisation have a different perspective on events, including the delivery of programmes. The results of the survey suggest that too narrow a view is taken across organisations.

### Differing perspectives



Of course we would expect different segments of a workforce to view change programmes differently – some are driving the programme and others are on the receiving end.

Results of the survey show a gap between what the Executive Team think about programme delivery and what staff and PMs believe.

The Executive Team have to bridge this gap to ensure PMs can successfully drive the change needed. Plus PMs have to bridge this gap and help the Executive Team drive programmes of change.

PMs have an opportunity to play a bigger role in leading and delivering their services – connecting better with the Executive Team.





# Theme 1

## Optimise your portfolio to maximise returns

*Creating an organisational portfolio of change programmes or projects requires a blend of experience and science. It requires the experience and knowledge of key individuals to set the direction and construct of the portfolio, together with the science behind portfolio management and optimisation to ensure that it delivers value, manages risk and maximises returns. Too often portfolios are left to chance and they are not developed and then managed in a methodical way.*

*“I plan for ten years (dream), focus on five years and execute for three years.”*

CEOs recognise the need to be more agile in planning and have multiple planning horizons. They recognise that they need to plan for the short, mid and long-term, and many are dissatisfied with their current planning horizons. They must now be able to run the business of today while creating the business of tomorrow. They must foster creativity and yet make sure that it's systematic.

To put it another way, today's CEOs must be hybrid leaders capable of managing dual horizons, combining the best of the old with the new and piloting their organisations through enormous changes to make them fit for the future.

But CEOs often don't have the time to stop and reflect on decisions they have previously made – are they still going in the right direction? Has their portfolio grown organically into something that doesn't fit with their strategy and deliver the desired returns?

*“We need to become more agile and dynamic in the way we plan.”*

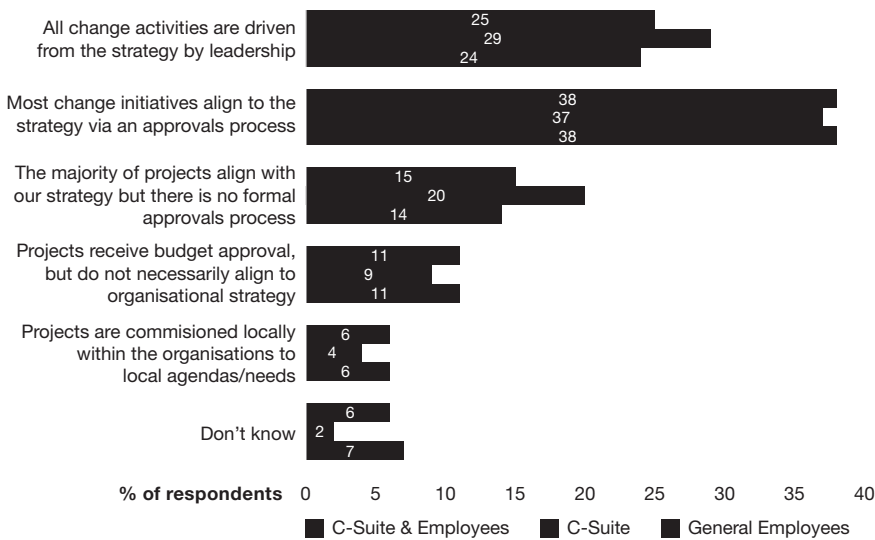
The Global PPM Survey indicates that too many programmes are not under the control of a well defined portfolio of strategic change that can be clearly linked back to the organisation's strategy. Portfolios have developed over time but without a methodical approach to forming that portfolio the organisation is effectively leaving the delivery of their strategy to luck.

Given these challenging times and shifting paradigms, many organisations often struggle with ensuring alignment between the capital that is being invested into the business and delivering against the organisation's strategic objectives. The survey suggests this is because the majority of Executive Teams believe that new initiatives are 'clearly defined, generally understood but difficult to measure'. It is this difficulty in measuring change that leads to issues in measuring portfolio success and value creation.

For example, less than a third of Executive Team respondents thought that all change activities are driven from the strategy by leadership, and only half of PMs felt that decision making across the portfolio is supported by objective criteria and quality data to ensure alignment to the organisational priorities.

The Global PPM Survey has produced some compelling evidence that when Executive Teams focus more effort on their portfolio, in the way it is conceived and managed they see better performance. We often see organisations using subjective information or making decisions based on political will and commencing programmes that should have never started in the first place – guessing is not a strategy for change.

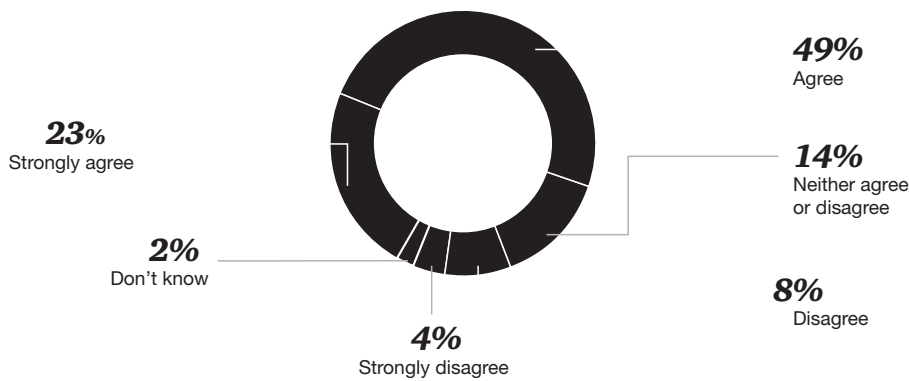
**How well is your organisational strategy delivered through change activities?**



Both Executive Teams and PMs have to start getting the basics right, and the first step is to clearly align their portfolio of programmes to the organisation's strategy.

- It can be seen in the chart to the left that 86% of C-Suite feel that their projects are aligned to strategy.
- But of the PM professionals who deliver these programmes only 72% agreed that there is a coherent relationship between the programme's objectives and benefits and the organisational strategy and vision.
- Moreover, PwC's maturity assessments show that only 62% of programmes have an established or mature link between objectives and organisational strategy.
- Whilst these results are encouraging, organisations should strive for even more alignment with their strategy – if the investment in 14-38% of projects is not helping deliver strategy what is it doing?
- Organisations are encouraged to go the extra mile and make this 100%.

**There is a coherent relationship between the programme's objectives and benefits and the organisational strategy and vision**



Base: 1,744 PMs

### Portfolio Maturity Curve



In the past couple of years, there has been a marked improvement in terms of organisations seeing some alignment between programmes and strategy. This is a significant step in the right direction for PPM professionals, but there is still more to do.

- In 2012, as many as 30% of an organisation’s programmes were in some way conflicted with the overall business strategy, and 20% did not see a correlation between the project portfolio and business strategy.
- In the 2014 survey almost 80% feel that their projects are aligned in some way to strategy.

It is clear that whilst progress is being made, there is still a long way to go until all respondents will see alignment. We see in our engagements that many organisations would sit at level 2 and 3 of the portfolio maturity curve. It is imperative that all organisation move beyond level 1 to maximise their investments in change programmes.

Today, the main focus areas for PMOs are either simple reporting (63%) or monitoring (54%) services. To move up the maturity curve, the PMO will need to undertake more proactive portfolio optimisation services such as those outlined here.





**What the 2014 Global PPM Survey also said:**

**29%** of the Executive Team reported that all change activities are driven from the strategy by leadership.

**45%** of respondents report that portfolio performance is not regularly reviewed by key stakeholders so that it aligns with the organisation's strategy.

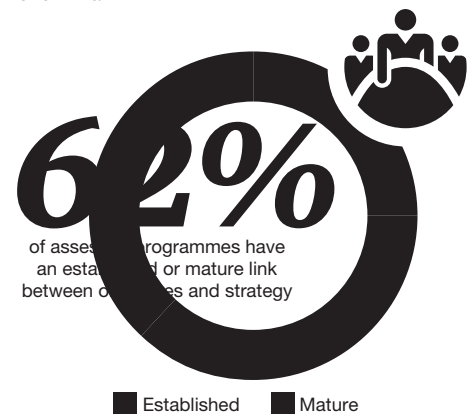
Only **53%** said that decision making across the portfolio is supported by objective criteria and quality data to ensure alignment to the organisation's priorities.

**43%** of respondents said that their organisations successfully use software to enable project/portfolio management.

**Impact and comment**

- Significant resources are being applied to change initiatives that are not driven by strategy. This is potentially a lost opportunity to ensure that all change is focussed on achieving the strategic goals of the organisation. Both Executive Teams and PMs should strive to increase this figure.
- A methodical approach to selecting the portfolio can be wasted if it is not regularly reviewed to ensure the expected outcomes and benefits are still on track. Governance arrangements should include formal reviews at regular intervals through the full project life cycle.
- Only by taking a methodical approach to the optimisation of the portfolio can an organisation be sure that its investment in change programmes is being effective and remains aligned to deliver the necessary value.
- Complex portfolios and those that have many interdependencies could benefit from a more structured approach using software and skilled practitioners suited to their needs.

PwC's maturity assessments show that:







*Using a clear methodology removes 'gaming' from the prioritisation process and selection of change programmes.*

## Theme 2

### Be flexible, change faster

*As the pace of change accelerates organisations are not adapting quickly enough as new challenges arise. The volume, complexity and urgency of change is increasing but programmes are not responding appropriately.*

*“Think big, start small, act fast.”*

There is an ongoing theme in the Global PPM Survey data suggesting that change is required to be happening faster but that programmes are not embracing this in terms of pace of delivery.

Both Executive Teams and PMs have to start getting the basics right – more effective planning and creation of a clear scope at the outset of programmes will help organisations be more agile.

Persistent trends for the past ten years, poor planning and scope changes, have been cited as two of the top three reasons for project delays.

PMs have a responsibility to ensure that their organisations plan more effectively at programme inception – better estimates and developing a tighter scope will undoubtedly help programme delivery. Not affording ‘proper time’ to these areas at the outset can lead to missed deadlines, unrealistic expectations, unclear objectives and general delay.

The trend also shows that scope changes are also recognised as a key factor that delay projects – perhaps reflecting a lack of clarity in the original objectives.

Without getting these issues right at the outset it is much more difficult to react quickly and appropriately when change occurs mid project.

Once programmes are up and running it is crucial that both Executive Teams and PMs are flexible and agile – able to react to the ever changing environment in which they operate – and it is more than simple change control or good phasing.

A different approach is needed – agile, yet grounded in good data.



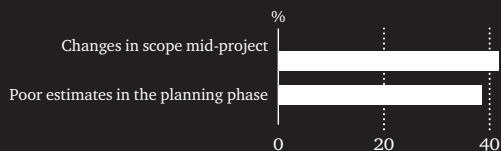


of assessed programmes have established or mature tools and methods for managing changes in scope

Established Mature

### What the 2014 Global PPM Survey also said:

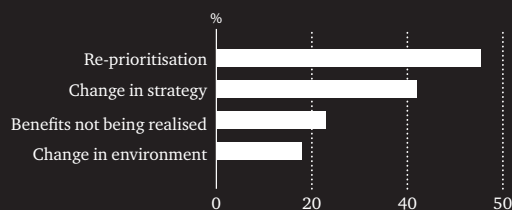
The top two reasons for project delays were:



### Impact and comment

- Organisations must set their programmes up for success by clearly defining scope at the outset – and test it rigorously as investment early on will reap rewards when things change going forward.
- Poor estimates keep being cited as key reasons for delay – 10 years of survey data tell us that. Often the planning phase is not given sufficient importance as the demands to 'get started' override the correct option of ensuring estimates are as good as they can be.
- As programmes progress rigorous change control can help keep them on track.

The top four reasons for project failure include:



- Not everything is within the control of the PM, or indeed the Executive Team.
- Being flexible enables organisations to make the right decision about the future of a programme – sometimes closure is the right answer.

- However, we have a paradox in the results as 77% of PMs believe that a formal process is in place for managing change, and 76% say that changes in scope are approved by all stakeholders.
- This doesn't seem to fit with the finding that changes in scope are the most common reason for failure or delay.
- PwC's maturity assessments seem to present a more realistic view in that only 43% of organisations were found to have an established or mature set of tools and processes for managing changes in scope, and for communicating and governing those changes.

**47%** of CEOs in the CEO Survey are concerned about the speed of technological change as a potential threat to their organisation's growth prospects, up from 42% last year.

- These changes can be an opportunity as much as a threat, but organisations must set themselves up to realise these opportunities by structuring their programmes in a way that enables them to be flexible and fast to respond.





Being flexible to change faster requires a specific set of conditions to exist in a delivery environment. Creating these conditions is critical to enable programmes to be delivered with maximum pace and buy-in. Core to creating this environment are the following areas of focus:

- **Leadership** – actively supporting a different way of working; a greater appetite to innovate and try new things; creating the ‘platform’ for a flexible team to be assembled; mentoring others to embrace the new way of working; and challenging the organisation’s ways of doing things.
- **Strategy** – continual alignment to strategic priorities; focus on the appropriate horizon of time; and piloting new ways of working.
- **Culture** – embracing a greater understanding of risk; fostering a truly business ‘led’ approach; maintaining an unwavering commitment to collaborative working; transparency and recognition of what isn’t working well; embracing the concept of not letting perfect get in the way of progress; and deploying agile programme execution and governance capabilities and skills.
- **Behaviours** – Sharing successes and recognising the contributions of staff; working towards shared outcomes to solve common problems; view missed goals and shortcomings as opportunities to learn and improve not as failures; taking pride in work and having passion for the outcomes being delivered; having a ‘how can we’ attitude; and nourishing and growing people to reach their potential.



*Be more flexible in approach  
– be brave, and well informed.*

# Theme 3

## Enable your people to deliver success

*People deliver change programmes and often they are not being effectively enabled to do so by their organisations – they frequently lack the training, tools and resources to deliver results. Without this, no amount of structure, process or planning will deliver change successfully.*

Executive Teams may see the need to change, and have plans, but their organisations are often far from ready. Only a minority of CEOs feel that their organisations are well-prepared for delivering change programmes across most business functions.

Organisations should ensure that the PM community is enabled to deliver change by creating the right environment.

- Insufficient resource is allocated to change – people are still trying to deliver really important programmes ‘off the side of their desk’. Organisations are resourcing programmes alongside their day to day activity – fitting it in with the day job indicating that they do not make sufficient differentiation between ‘running’ and ‘changing’ the business.
- There is a paradox regarding training as 73% of PPM professionals surveyed felt that PPM is recognised as a critical skill, and invested in... yet in most organisations less than 40% of people are certified in the organisation’s methodology and 55% thought that their organisation did not provide enough programme management training. Certification in the organisation’s preferred methodology is essential for professionals delivering any size of programme, and while not a proxy for capability, it can at least ensure that the organisation’s programme management community

CEOs don’t feel well prepared – most alarmingly is that even though talent strategies top the list of areas demanding change, they feel the HR department is only 34% ready for this



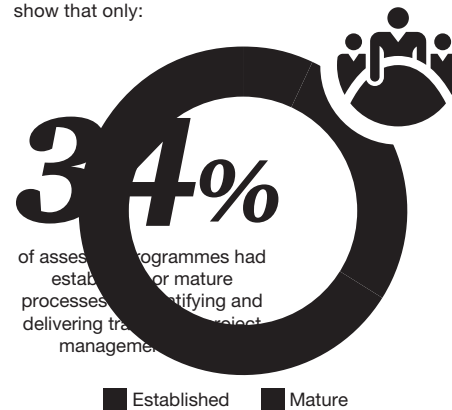
Source: PwC 2014 CEO Survey

have a common understanding of how the organisation expects them to deliver programmes, and how they communicate across the organisation using a common PPM language.

Moreover the view that PPM is recognised as a critical resource is not supported by the results of PwC’s maturity assessments.

We found that only 7% of programmes had a mature approach to identifying and providing training for project management staff, and while a further 27% had an established process this still means that less than half of the programmes assessed had the appropriate level of training available for the people delivering them.

PwC’s maturity assessments show that only:



The 2014 Global PPM Survey also provided further evidence of the need to enable people to deliver, ranging from the strategic to tactical:

**40%** of the Executive Teams and General Managers manage their change programme responsibilities on top of their full time core task responsibilities.

Only 6% said they had been seconded full time.

**64%** of CEOs say that enhancing their skilled workforce is a priority over the next three years.

**15%** say they have delegated tasks so as to free up time to spend exclusively on the programme of change – 51% say that the additional workload caused by ‘change the business’ programmes is ‘manageable’.

A third of the PM professionals indicated that only

**20%** of individuals are certified in their organisation’s preferred methodology.

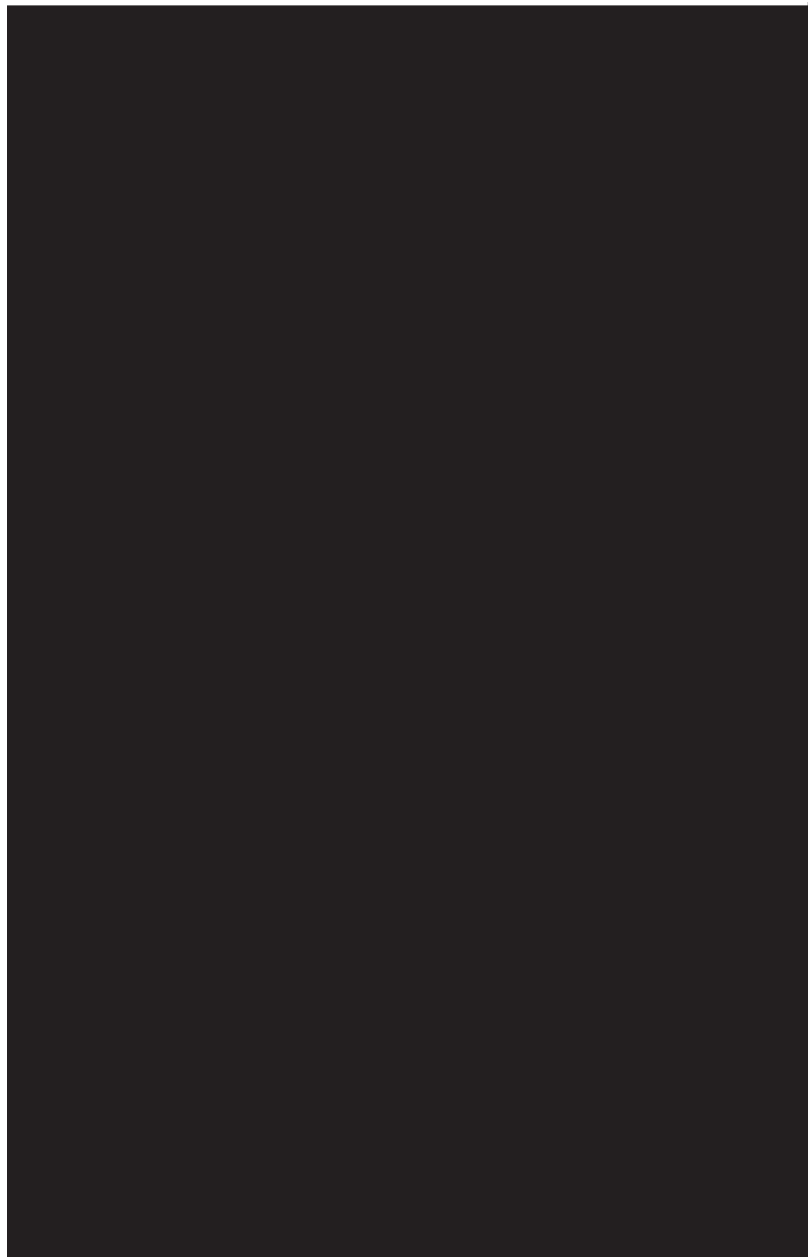
**55%** of PM professionals say that their organisations provide too little time for PPM training and development.

**55%** of PPM professionals get their project management training ‘on the job’ or by way of ‘e-learning/self study’.

**43%** of PPM professionals say that their organisations successfully use software to enable programme/portfolio management.

## Impact and comment

- This increases delivery risk. PMs get to spend less time with the people in the business who are responsible for delivering the programme’s benefits. Successful delivery needs everyone involved on a regular basis.
- This is good news, as it is people that deliver change not processes or tools. A skilled workforce that can turn ideas into reality that allows organisations to leap ahead of the competition is essential.
- Between 2010 and 2020 an estimated 16 million new project management jobs will be added globally – but organisations are already struggling to fill some positions due to a talent gap.
- Do CEOs see professional PMs as an area they need to strengthen? If not, this could lead to large programmes being put at risk.
- ‘Manageable’ does not always equate to successful.
- Could the small percentage of the Executive Team who are delegating tasks explain some of the other findings in the survey – including the low percentage of effective communications?
- Not freeing up sufficient time to focus on change could also help explain the relatively low percentage who say they actually got the change they commissioned.
- Whilst not a proxy for competence or capability, certification for PM professionals delivering large programmes can convey confidence and professionalism that helps with communication.
- Methodologies provide the common framework and language for planning and executing programmes, as well as communicating status. In order to deliver complex programmes PPM professionals should be certified in their organisation’s methodology of choice.
- Delivering programmes that help organisations meet their strategic goals is complex. Expecting PMs to deliver effectively is not an unrealistic expectation, but it might be if they are not receiving the training and development required to be successful in their role.
- There is a clear desire in the PPM community to enhance their skills, but an element of frustration that such development is not readily available.
- However, PM is a profession. Simply doing a one week course does not make you a PM professional. This takes years of experience and extensive relevant training coupled with the right personality attributes.
- 82% of PMs agree that bespoke PM training contributes significantly to enabling organisational business performance.
- Does continual ‘on the job’ training enable PMs to keep up with the latest thinking and make the best use of appropriate tools and methods?
- To get the change that organisations commission, it is not a surprise that the right combination of people, process, tools, and the environment they operate in is a prerequisite to success. With less than half of the respondents indicating that they are not entirely successful in using software to enable these functions, this is an obvious gap that needs to be addressed.





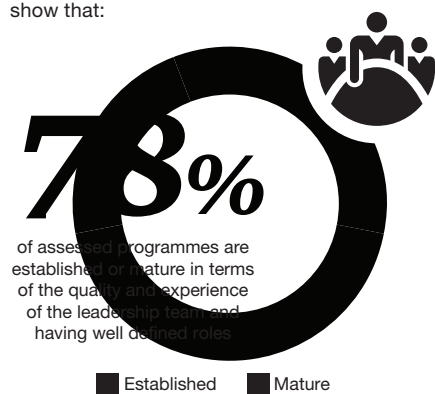
# Theme 4

## Connect Executive Teams to delivery teams to get the change you want

*There is a disconnect between those leading change and those delivering it – they have different perspectives on how change is delivered. If they were more obviously connected then results would improve. But leadership is not the sole responsibility of the Executive Team – PMs and programme sponsors can help leaders deliver more effective programmes of change.*



PwC's maturity assessments show that:



The Global PPM Survey clearly demonstrates a disconnect between what the Executive Team and the PM community believe – results consistently show that they have a different view on various aspects of programme delivery.

The largest difference is when we asked if they felt their input added value to programmes – 63% of Executive Teams felt they did, as opposed to only 45% of General Managers (this is quite astounding in that we have over a third of Executive Teams effectively saying that they do not add value!)

However, we might expect different segments of a workforce to view change programmes differently as some are driving the change and others are on the receiving end. It is perhaps a reflection that people across an organisation have a different perspective on various elements of an organisation's activities as their focus is on different levels of the organisation's hierarchy.

PM professionals can bridge this gap and help the Executive Teams drive programmes of change. There is a need to consider different perspectives when developing new solutions or improving existing systems. Very few people see the whole picture, or indeed the same picture.

The most regular service carried out by PMs was 'status reporting' to upper management. 'Participate in strategic planning' was ranked 5th with only 28% of PMs identifying this as a service they are involved in.

PMs can step up and correct some basic issues themselves – not wait for the Executive Team to help them do so. Executive Teams should expect more of their professional PMs in this respect. If PMs are to be more recognised as a professional body they must be more forceful in helping Executive Teams lead and drive programmes using professional methods and tools.

Executive Teams tend to have a higher confidence that change activities directly influence the performance of the organisation – is this simply over confidence or do PMs overpromise?

Our survey found that only 19% of non PMs felt that the desired business outcomes were understood clearly by their staff. Less than 20%? Less than a fifth? That is quite alarming and demonstrates an urgent need for better and more sustained communications to convey the end goal to staff effectively.

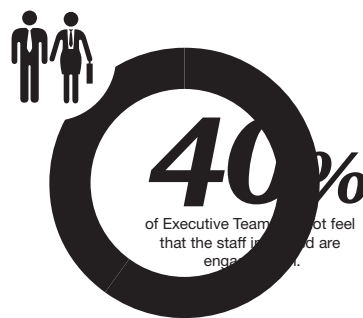
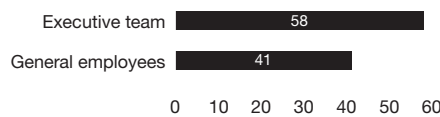
Communication is an area where the Executive Teams and General Managers differ in their views. 58% of Executive Teams feel that there is consultation and engagement with those impacted by change –that in itself is not great as it means that 40% of Executive Teams do not feel that the staff impacted are engaged with! But only 41% of General Managers feel that those impacted are engaged with – so we have the leadership team ‘thinking’ they do an average job, but those most likely to be affected by change think the communication is not that good.

The survey results indicate that communications from those sponsoring change to those delivering it needs to be greatly improved. Good communication is more than providing a top down briefing session.

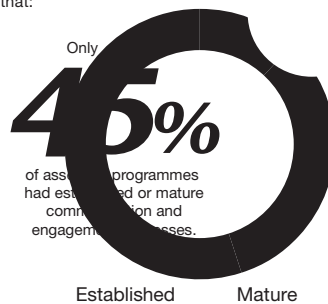
When PwC have assessed organisations’ communications and engagement processes within programmes of change we have found that less than half have well established processes for managing the dissemination of information into the organisation. This is a critical element of any change programme so there is room for improvement.

*‘There is a need for improved consultation and engagement with those affected by change.’*

**% that agree there is consultation and engagement with affected staff**



PwC's maturity assessments show that:



The Global PPM Survey presented a number of examples of where the perception of the Executive Teams and other staff, including PMs, was sufficiently different to warrant the view that this disconnect needs to be addressed.

#### What the 2014 Global PPM Survey also said:

#### Impact and comment

##### Engagement

**75%** of Executive Teams said that when change is commissioned business outcomes are clearly defined and generally understood. However only 61% of General Managers agreed with this.

- Is this more hope than reality from the Executive Team? This difference points to the need to still do more to ensure that the whole organisation understands the business outcomes, and perhaps specifically what General Managers can do to help drive towards those goals.

Only **51%** of the Executive Teams said that change programmes are 'well communicated throughout the organisation' ...yet strangely 69% of General Managers said they could 'explain the benefits of change programmes within the organisation'.

- In this case perhaps the Executive Teams are being a little pessimistic. However, the communication of such programmes is totally within their gift so they should be doing more to ensure a good communication plan is developed and implemented – should the bar not be higher than 51%?

Indeed **11%** of Executive Teams felt that business outcomes were not clearly understood, whereas 19% of all staff felt the same.

- Communicating is one thing, making it stick and counting it as successful is another matter.

##### Performance

**71%** of Executive Teams see a strong link between change activities and the performance of the organisation, compared to only 61% of General Managers.

- While this could simply be down to the Executive Teams having a better awareness of the impact their change programmes can have on performance there is still good reason to want to improve the knowledge of this across the organisation.

**30%** of Executive Teams believe they perform better at change activities than their peers, while only 21% of staff think that's the case.

Programme success was judged differently as 60% of Executive Teams thought that more than 60% of their programmes were a success, but only 36% of general managers felt that level of success.

**63%** of Executive Teams say they feel that their input always adds value to the programme compared to 45% of general managers.

- 37% of the Executive Teams don't feel they always add value – and action should be taken to improve the value that general employees feel they can add to programmes, otherwise it will always be down to the PMs to drive value.

Only **6%** of staff felt that change programmes were co-designed with staff, customers / end users. Of course not all programmes are suitable for such co-design.

- It is acknowledged that programmes which have broad buy in are more likely to be successful. Co-designing the programme in the first place helps this, so only 6% is a low return that leaves plenty of room for improvement.

*So, the PM community has to encourage better adherence to the basics of programme management, as well as offering more support to the Executive Team to improve practices and hence outcomes.*

***Executive Teams need to resolve the ongoing issues with poor estimates, scope changes and insufficient resources if they are to get the change they want – something they have failed to do over the past 10 years. At the same time they must embrace new ways of delivering projects to keep pace with their environment.***

There are actions both the Executive Team and PMs could take to improve co-ordination. They should aim to create a greater overlap between governance and communications within the programme structure. A deepened sharing and understanding are more likely to produce more effective results.

Executive Teams should:

- Show commitment to the importance of programme management and understand delivery issues. When programme outcomes are clearly defined, measurable and understood by all, results improve; and
- Be encouraged to make better use of the experience and value their professional PMs can offer. Often PMs are seen as providers of data, or worse still administrators – they need to be adept at technical reporting but can add far more value through working closely with leaders to shape and drive programmes.

If PMs are to be more recognised as professionals they need to:

- Be more forceful in helping Executive Teams lead and drive programmes using professional methods and tools;
- Do more to drive the right behaviours guiding the Executive Team to improve on the basic improvements highlighted in this report;
- Bridge strategy formulation and delivery – and help the Executive Team to do the same; and
- Take responsibility for working more closely with the sponsors of major programmes – they need to be realistic with the Executive Team, tell it as it is and not be forced into agreeing unreasonable scope, estimates, delivery or resource plans – these are the basics that must be right but are often not agreed implicitly up front.



*Results will improve if there is a closer understanding and working arrangement between the Executive Team and PMs.*

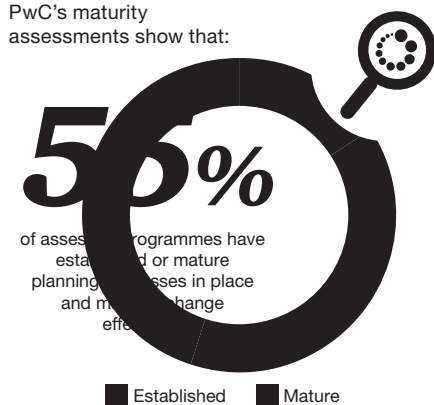


## Theme 5

# Measure and address the harsh facts to maintain direction

*In addition to not being clear about the objectives at initiation, the Global PPM Survey suggests that organisations are not measuring progress towards achieving the desired outcome and benefits on a regular basis, and therefore they are unable to tackle the tough issues that arise. By failing to maintain a line of sight to the end goal, programmes can lose their way and fail to deliver on their promises.*

PwC's maturity assessments show that:



Some of the basics of programme management need to be carried out in a much more effective way – setting clear objectives and scope at the outset, as well as being clear on the intended outcomes and benefits to be realised help set the programme up for success. Maintaining this focus and discipline throughout delivery is equally important and evidently challenging.

There are a number of issues highlighted by the 2014 Global PPM Survey whereby the PM community can lead by example in improving their processes – a critical look at some of the survey results suggests that the PM community needs to brush up on the basics:

- Almost 40% of PMs do not believe there is clear decision accountabilities within programmes to enable delivery.
- Almost a third of PMs say they do not have integrated schedules – i.e. schedules at both programme and project level that align.
- The management of risks and issues – the most basic of PM functions – is not being carried out effectively. It could be expected that the following results from the Global PPM Survey should be much closer to 100%:
  - Risks are adequately identified and assessed in order to minimise the threat to programme objectives – 72%
  - Issues managed in a timely manner – 77%
  - Risk management arrangements continue through the life of the programme – 72%

- Only 72% of PMs agree that ‘a structured approach has been adopted to determine business requirements to meet the objectives of the programme’ – so how did the other 28% expect to deliver meaningful objectives?
- Only 59% of PMs feel that costs of the programme are truly aligned to outputs or benefits.

Maintaining the discipline to exercise programme management basics consistently throughout delivery is a common and recurring theme. The challenge for PM professionals is to consider how we can manage these basics differently to make them less of an overhead and more integral to what we do day to day.

Another feature is that the regular measurement of progress, both tactical and strategic, is not undertaken in all programmes. This measurement needs to extend beyond the parameters of time and cost to a regular and ongoing assessment of whether or not the programme is on track to deliver the outcomes and benefits it was intended to.

Benefits are the fundamental driver of any change an organisation invests in, yet whilst many will invest time and effort in defining and quantifying the benefit to justify the investment, few remain focused on realising them. Programmes start off with good intentions, but if Executive Teams don't show continuing interest they often stop measuring after 3-6 months. This unsurprisingly coincides with the project starting to fail.

These results are supported by PwC's maturity assessment findings that illustrate that almost half of programmes do not have established processes for managing change.



Often, the daily pressures of programme delivery become the primary focus and keeping the programme on track, to time and within budget whilst dealing with competing resource demands across the organisation as well as external influencing factors becomes the focus of management attention. Inevitably, once the change has been delivered the organisation has moved on to the next challenge and there is little time to revisit or review benefit forecasts to determine if the investment really did deliver on its promise.

Not only is there a need to drive Executive Team focus on the end goal and the monitoring and management of achievement against this, there is a need to drive their confidence to deal with the tough issues. They need to be well informed and advised on programme progress and willing to make tough calls to make sure the programme stays on track to deliver on its promise. Where this is no longer the case the Executive Team need to be confident in redefining or even stopping the programme to reinvest resources in areas that will drive a strategic outcome.

This is the area that the results of PwC's maturity assessment differ most from the PPM Global Survey results. As can be seen opposite we have identified a real gap in the way that benefits are initially identified and then tracked through to realisation. These results suggest that all organisations could challenge themselves to be more robust when assessing and measuring benefits.

### What the 2014 Global PPM Survey also said:

**24%** of PMs say that costs are not clearly defined at the appropriate level within the lifecycle of delivery or scrutinised prior to approvals.

**50%** of PMs agree that an appropriate baseline exists to measure all benefits in their organisation.

**51%** of PMs say that where benefits are set, their organisation always/often monitors and measures benefits.

**46%** of PMs say that where benefits are set they are always/often realised.

### Impact and comment

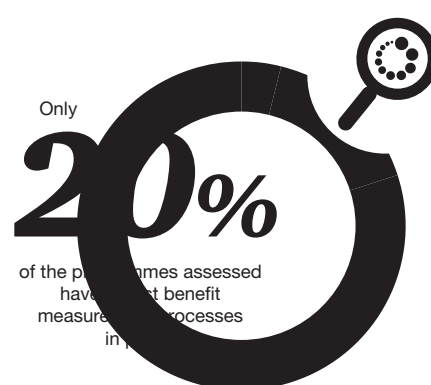
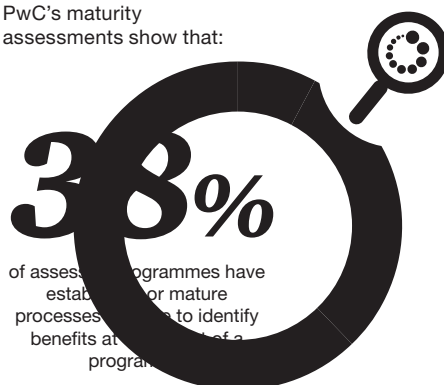
- Programmes going over budget are almost typical – without clear costs agreed at the outset it is little wonder that budgets go out of control – this is a basic that PMs must ensure are completed properly.

- Only half say that a baseline exists, and of those only half are measured regularly – this could mean that only 25% of progress is being measured.

- This result is not nearly high enough from any perspective. Constant measurement of a programme's ability to deliver the benefits is a must.

- Given the issues above it is little wonder that less than half of the benefits expected are realised.

PwC's maturity assessments show that:



*Programmes must measure progress, identify risks and tackle the difficult issues, changing course where necessary.*



*Measure, Review, Act*

# Conclusions

*The results of the 4th Global PPM Survey repeat some consistent messages from our previous surveys as well as opening up new insights that can help organisations deliver better results from their programmes of change.*

*There are also consistencies with the data PwC collects from its maturity assessments, though some results demonstrate that the survey is sometimes more optimistic than the reality we observe when undertaking these assessments.*

Organisations are **operating in an environment that is moving faster than ever before**. They are being challenged by regulators to operate ever more effectively, and traditional methods, thinking and action will not be sufficient in this fast paced world. **Organisations must do things differently.**

For **ten years** our survey has highlighted that some programme management basics are not being carried out effectively. As well as doing things differently organisations must improve their **delivery of programme management basics** such as scoping, planning and resourcing to get the change that will deliver their strategic outcomes.

The survey also identified a **gap between the Executive and PMs**– they must become better connected in order to **work effectively as one team** towards delivering organisational goals.

Our analysis of the results from the survey has led us to recommend five themes that will help organisations improve the outcomes they achieve from their change programmes:

- 1. Optimise your portfolio to maximise return.** Use objective criteria and quality data to develop your portfolio. Guessing is not a strategy for change.
- 2. Be flexible, change faster.** Embrace change and make brave decisions.
- 3. Enable your people to deliver success.** Create the right environment and experience for your people to deliver.
- 4. Connect the Executive Team to programme delivery teams to get the change you want.** Working more closely will generate pace and better results.
- 5. Measure and address the harsh facts to maintain direction.** Tackle the big issues head on.

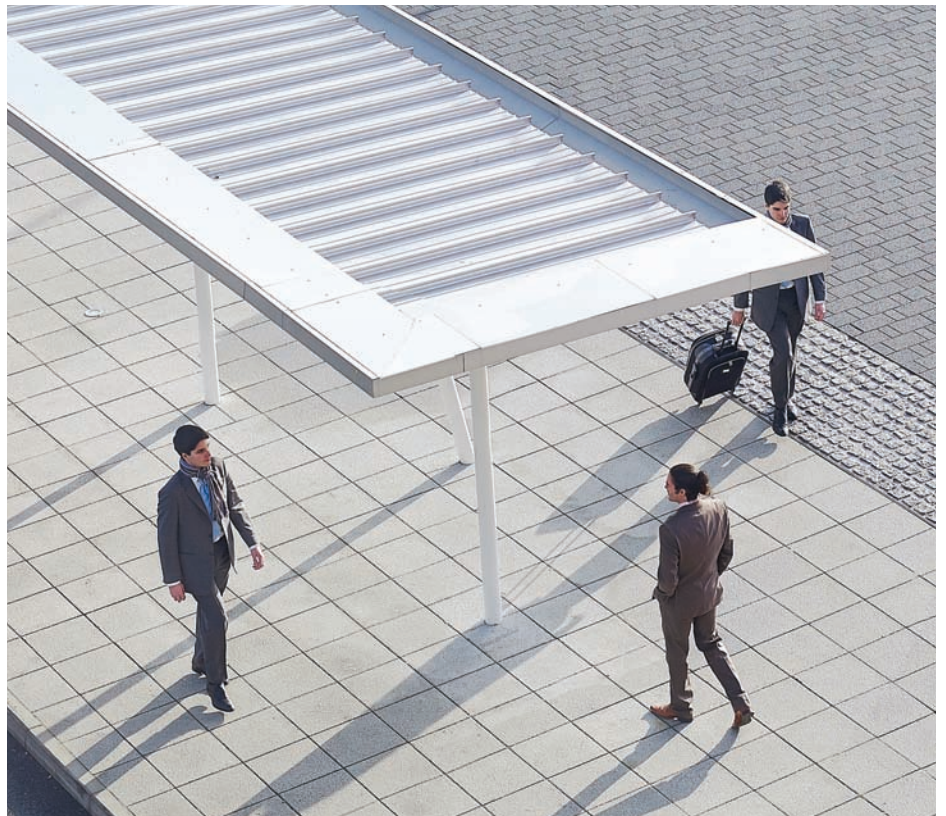
# What next?

*Adoption of these themes will only help organisations improve if they are tackled head on by both the Executive Teams and those responsible for delivery, whether that be general management or PPM professionals.*

There must be closer co-operation between all parts of an organisation so that change programmes are able to deliver the benefits that were expected at the outset.

**Executive Teams** should challenge themselves to be more connected to the teams that deliver their change programmes. The effort spent developing innovative strategies can be wasted if equal effort is not given to the delivery of the key programmes of change that will deliver the strategy. Organisations should invest in professional programme management and then enable them to deliver the programmes by being realistic about the resources required and encouraging the development of new techniques and processes that will be required in the future.

Equally **Programme Management professionals** have to take responsibility in making changes to the way things are done. They should be lobbying Executive Teams and reminding them of the benefits of professional programme management and the role they can play in delivering programmes of change. They also need to take a look at their own activities and ask why some basics of programme management are still not being carried out even though our previous four surveys have highlighted the same issues.



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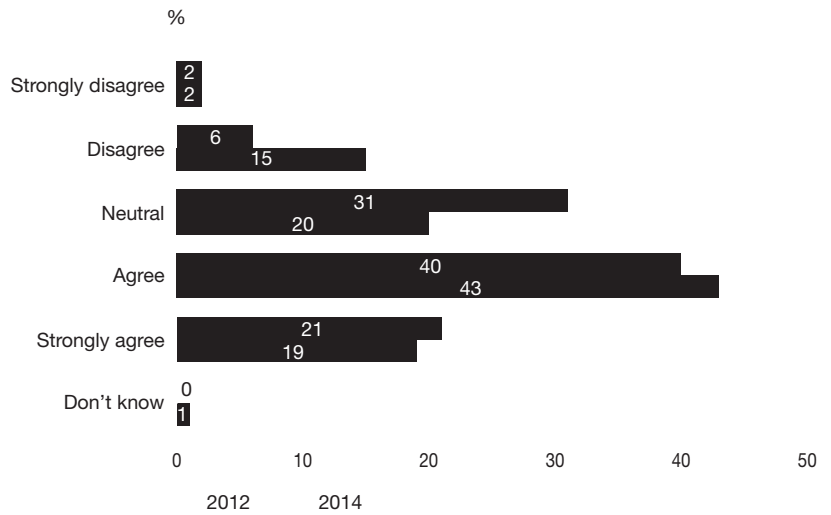
# *Appendices*



# So you want more data?

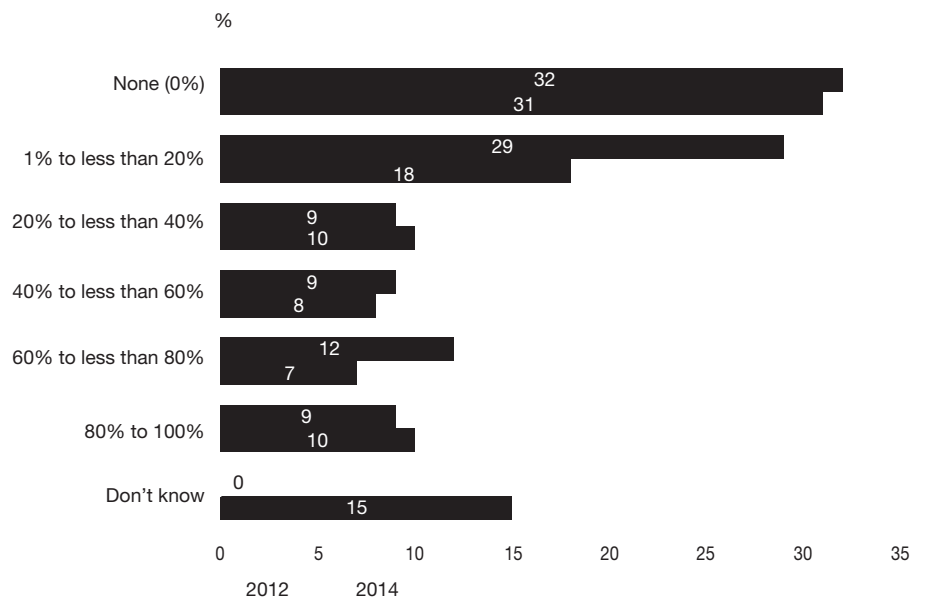


**Q: To what extent do you agree that EVM plays a strong role in the delivery of successful projects?**



Base: 919  
Source: PwC 4th Global PPM Survey

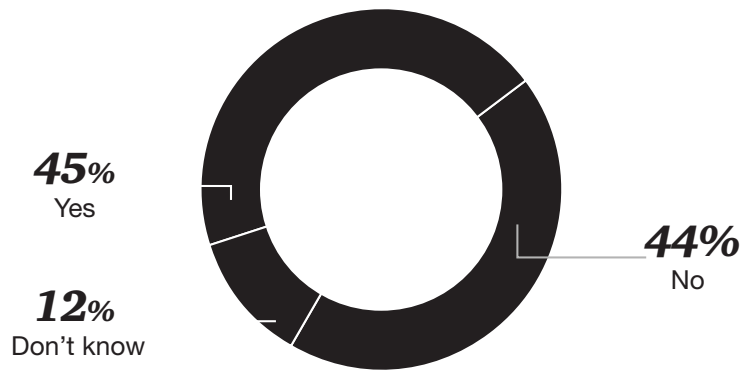
**Q: Please indicate the proportion of projects you use EVM for?**



Base: 1,700  
Source: PwC 4th Global PPM Survey

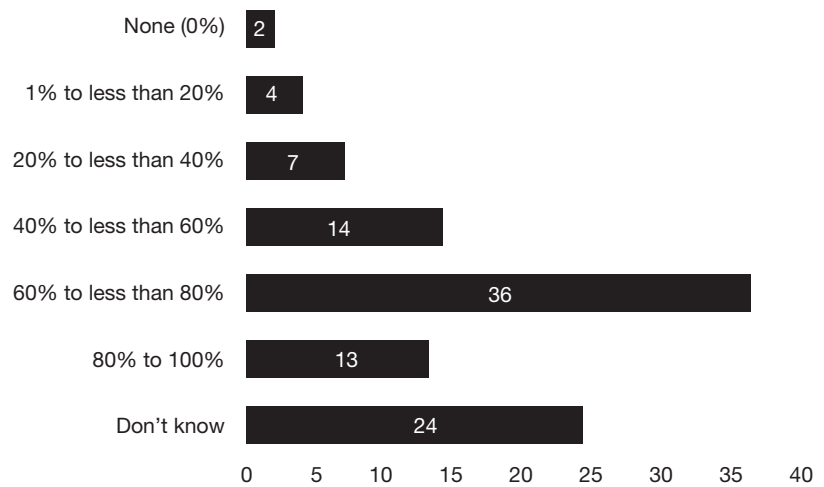


**Q: Do you use Agile Project Management methodology within your organisation?**



Base: 1,699  
Source: PwC 4th Global PPM Survey

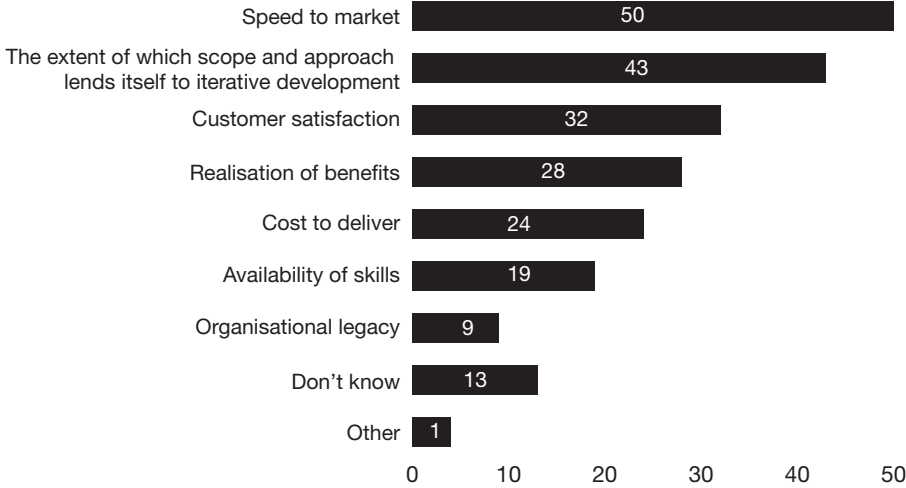
**Q: What proportion of your organisation's Agile Project managers are certified Agile Practitioners?**



Base: 761  
Source: PwC 4th Global PPM Survey

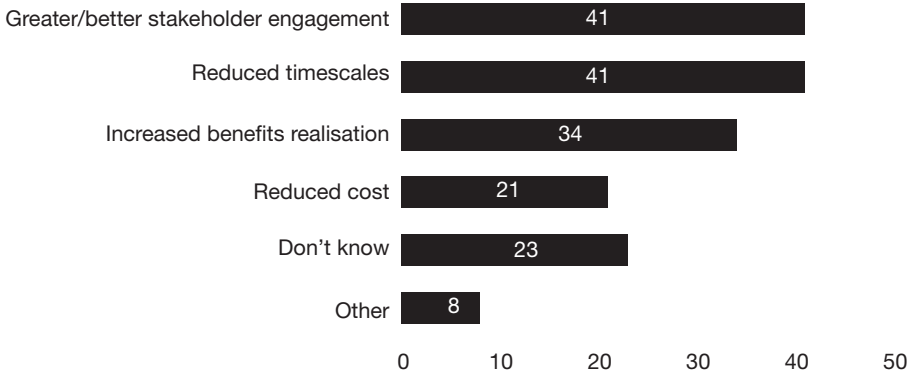


**Q: What criteria does your organisation use to choose Agile over Waterfall methodologies?**



Base: 761  
Source: PwC 4th Global PPM Survey

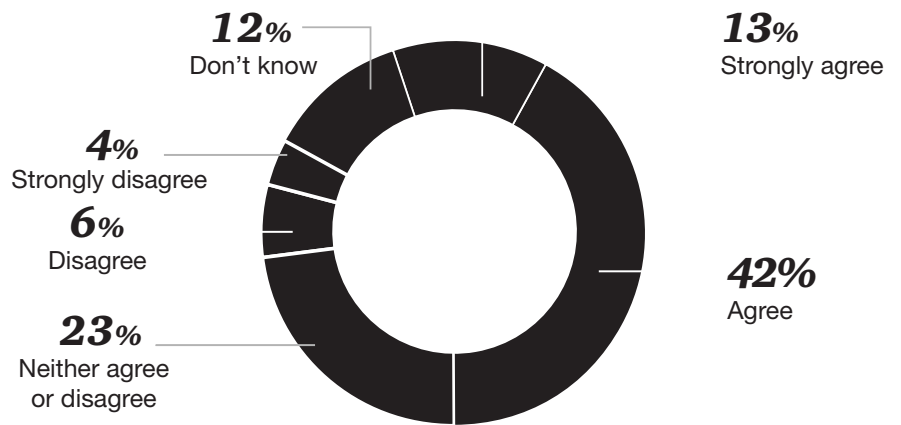
**Q: How, if at all, has Agile project management improved the success of your projects/programmes?**



Base: 1,700  
Source: PwC 4th Global PPM Survey



**Q: To what extent do you agree or disagree that Agile Project Management significantly contributes to enabling your organisation's business performance goals?**



Base: 761  
Source: PwC 4th Global PPM Survey

# Survey methodology

## Why?

We conducted our fourth survey to help organisations answer a very specific question:

*‘Do people who commission change get what they want?’*

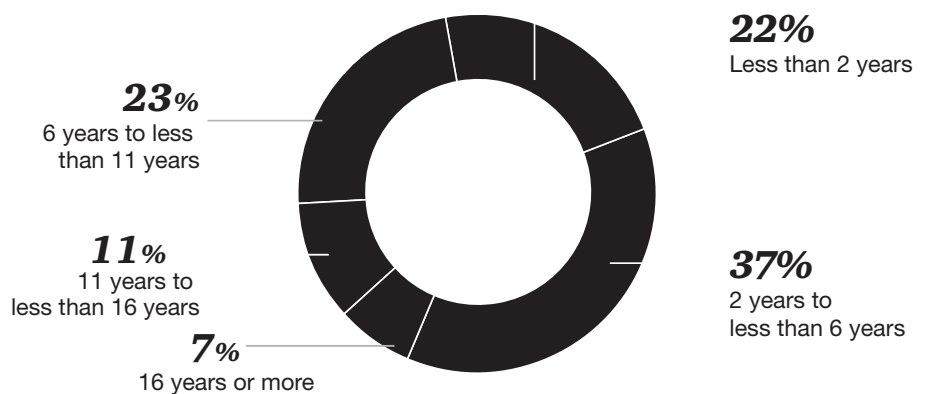
## Who?

The survey was organised to seek the views of three specific segments; the C-Suite, or Executive Teams; General employees; and Portfolio/PMs. This enabled us to see if different groups of staff throughout an organisation had a different view on the way programmes are delivered.

### The survey had responses from three segments



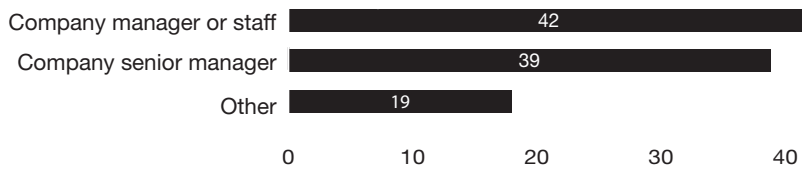
### Length of time in role as Portfolio and Programme Manager



Base: 1,699  
Source: PwC 4th Global PPM Survey

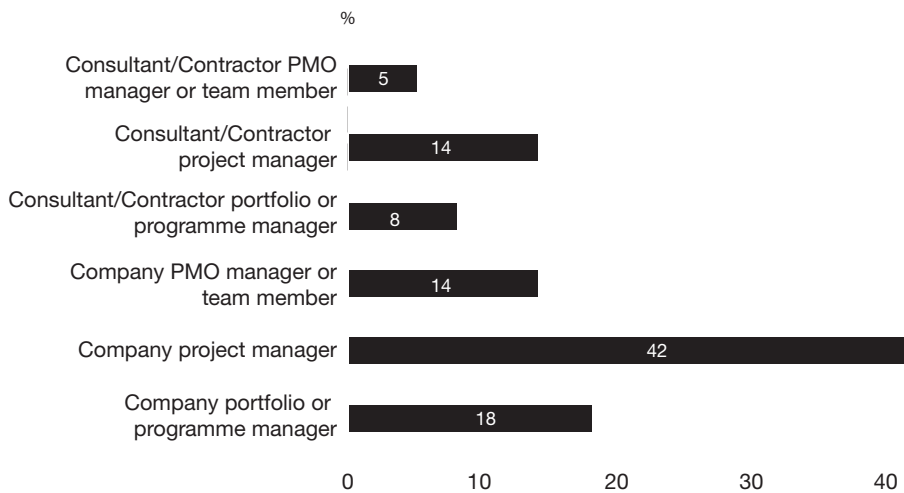


### General Employee roles



Base: 1,051

### Portfolio & Programme Manager roles

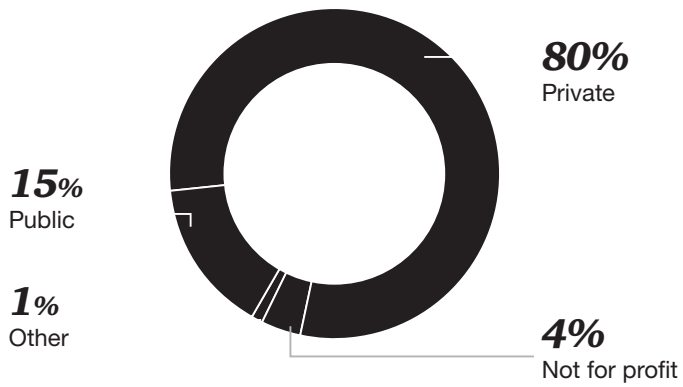


Base: 1,775

A record number of responses received:  
**3,025**  
people took part, from 110 countries, providing a truly global view.

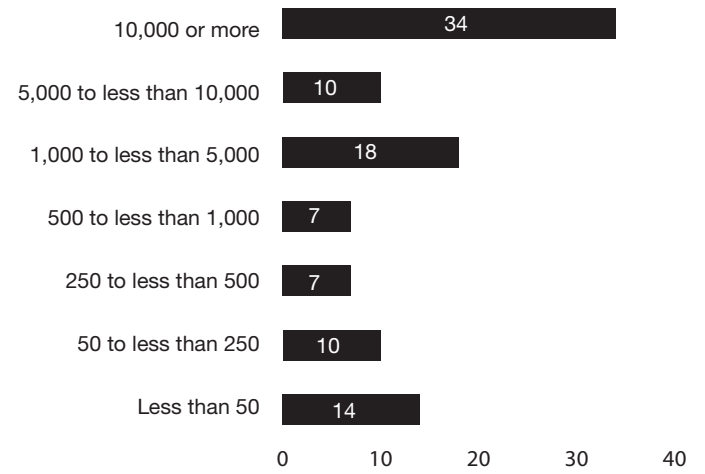
## Which organisations?

Type of organisations (%)



Base: 3,021

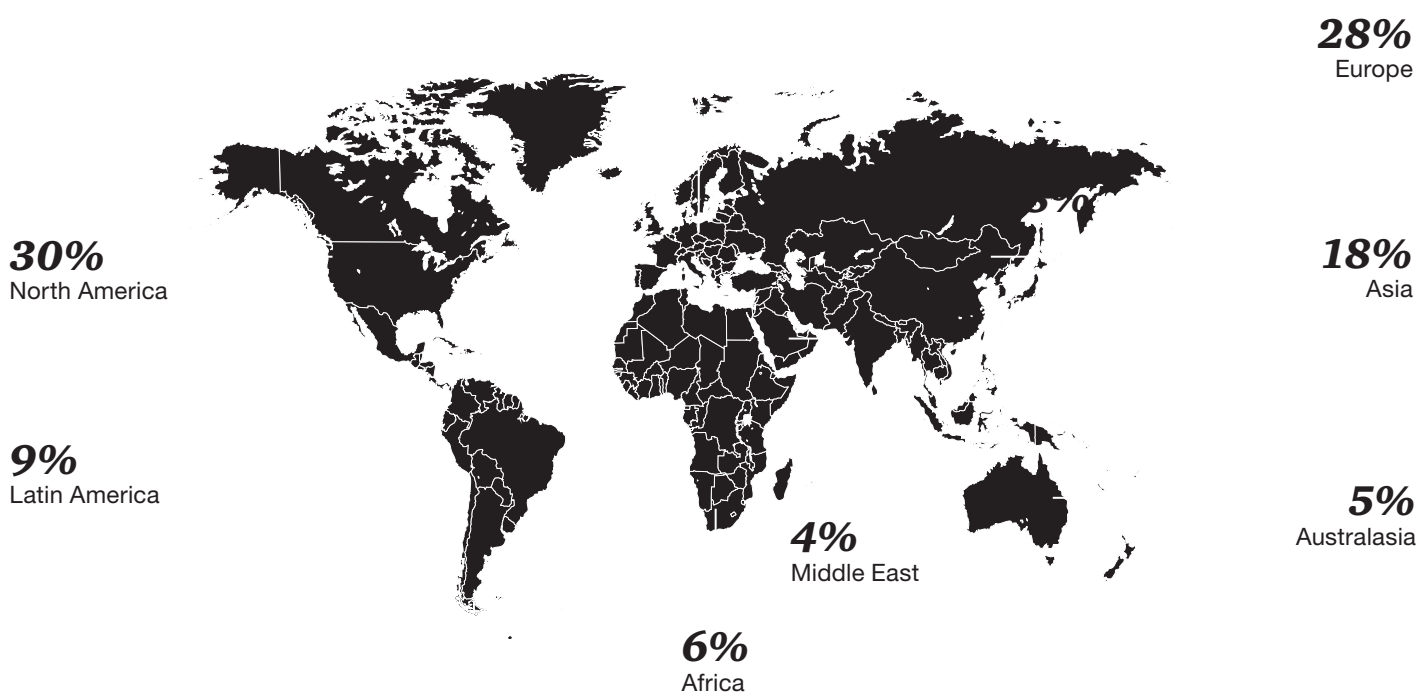
Number of employees (%)



Base: 3,019



## Where?



Base: 3,025

Graphic shows the operating regions of those organisations participating in the survey. (e.g. 47% of organisations involved in the survey operate in North America). Full details of the 110 countries that participated are included in the Appendices.

## When?

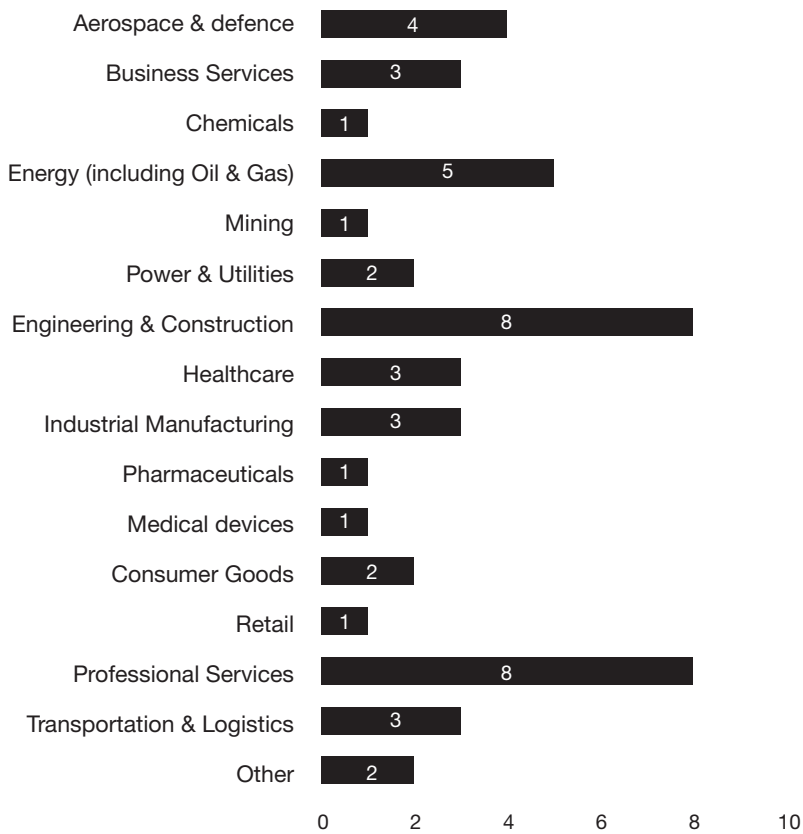
The survey was launched on: **12** November 2013 and, closed on: **3** March 2014

# Number of respondents by country

<b>Europe</b>	<b>No.</b>	<b>Latin America</b>	<b>No.</b>	<b>Middle East</b>	<b>No.</b>	<b>Africa</b>	<b>No.</b>
Armenia	3	Argentina	3	Bahrain	3	Angola	1
Austria	3	Barbados	3	Iran	5	Botswana	1
Belgium	7	Bolivia	7	Israel	1	Burkina Faso	1
Bulgaria	1	Brazil	1	Jordan	5	Cameroon	2
Croatia	1	Chile	1	Kuwait	6	Democratic Republic of Congo	2
Cyprus	4	Colombia	4	Lebanon	6	Egypt	12
Czech Republic	5	Costa Rica	5	Oman	5	Ethiopia	1
Denmark	3	Dominica	3	Palestine	1	Ghana	9
France	21	Dominican Republic	21	Qatar	18	Kenya	9
Germany	42	Ecuador	42	Saudi Arabia	38	Lesotho	1
Greece	9	Guatemala	9	United Arab Emirates	47	Libya	3
Guernsey	1	Jamaica	3			Mauritius	2
Hungary	2	Mexico	37	<b>North America</b>	<b>No</b>	Morocco	2
Ireland	15	Panama	3	Canada	203	Niger	1
Italy	25	Paraguay	2	USA	684	Nigeria	38
Macedonia	1	Peru	8	North America	9	Rwanda	1
Netherlands	9	Puerto Rico	1			South Africa	72
Norway	2	Saint Lucia	2	<b>Asia</b>	<b>No.</b>	Sudan	3
Poland	10	St Vincent and the Grenadines	1	Bhutan	2	Tanzania	2
Portugal	6	Trinidad and Tobago	8	Cambodia	1	Uganda	3
Romania	4	Uruguay	3	China	62	Zambia	4
Russia	9	Venezuela	2	Hong Kong	20		
San Marino	1			India	195	<b>Australasia</b>	<b>No.</b>
Serbia	2			Indonesia	2	Australia	125
Spain	32			Japan	119	New Zealand	21
Sweden	16			Kazakhstan	1	Papua New Guinea	1
Switzerland	18			Macau	1		
Turkey	107			Malaysia	45		
UK	471			Nepal	1		
Ukraine	3			Pakistan	10		
				Philippines	15		
				Singapore	15		
				South Korea	8		
				Sri Lanka	7		
				Taiwan	9		
				Thailand	5		
				Turkmenistan	1		
				Vietnam	4		

# Sector

## Consumer & Industrial Products & Services

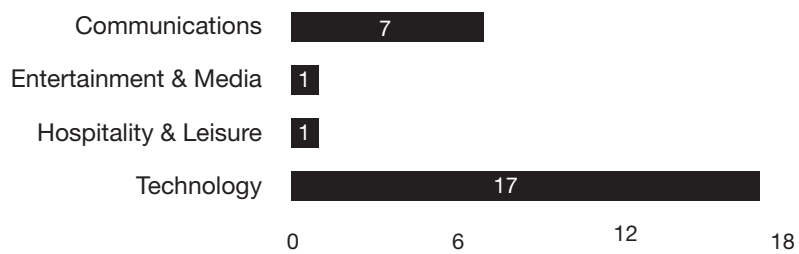


Base: 3,014

N.B Figures may not add to 100% due to rounding



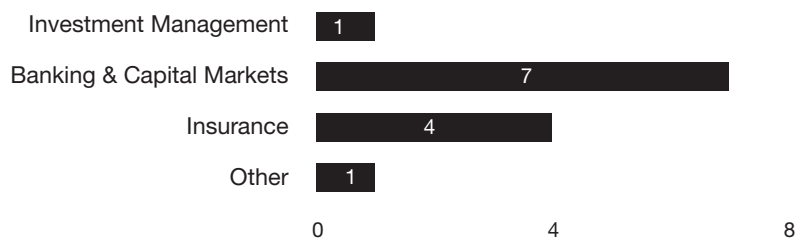
### Technology, Information, Communication & Entertainment



Base: 3,014

N.B Figures may not add to 100% due to rounding

### Financial Services



Base: 3,014

N.B Figures may not add to 100% due to rounding

### Government & Public Sectors



Base: 3,014

N.B Figures may not add to 100% due to rounding

# PwC's maturity assessment

## **Why**

This diagnostic tool assesses the maturity of the delivery capability for a portfolio/ programme and creates actionable recommendations, specific to the client business context.

## **What**

PwC's maturity assessments assess the effectiveness of an organisation's delivery capability from three perspectives: **insight, control and efficiency**. These are measured through five levels ranging from:

- **Level 0: Non-existent** – No identifiable management in place with no influence on project success; to
- **Level 5: Optimised** – A leading practice standard with appropriate stakeholder involvement, which plays a critical role in the success of portfolio/programme management.

## **Who**

- The benchmark data in this report is based on the results of maturity assessments carried out by PwC teams around the world on 169 client programmes and projects over the last 2 years.
- Industry sectors: All, including public sector and charities.
- Programme and project types: All, from e.g. specific HR initiatives to complex business-wide transformation programmes.
- Budgets: £50k to over £1.5b.

## **How**

Under each assessment, PwC programme management specialists have provided ratings against a set of 160 factors relating to programme governance and programme management.

## **When**

Timescale: 24 months to July 2014.

# Acknowledgments

*This survey and the resulting analysis could not have happened without 3,025 busy people taking time out of their schedules to tell us what they think about portfolio and programme management – again our thanks go to each one of them and their organisations.*

From inception to delivery we have relied on a great number of PwC employees to help us develop the survey, encourage participation and digest the results. Far too many to simply list here but they know who they are and as always we appreciate your excellent efforts.

A special thanks to Amanda Clack who sponsored the initial survey and has since moved on from PwC.

The following individuals have been hands on with the survey and we thank them for their contribution in preparing this fourth survey analysis:

## **Our sponsors**

Allan Howe, PwC Germany  
Gene Alfred Morales, PwC Phillipines  
Isabella Woll, PwC US  
Jennifer McCaffrey, Project Management Institute  
John Ready, PwC US  
Karl Reilly, PwC UK  
Kevin Sandler, PwC Australia  
Michael Cooch, PwC UK  
Paul Rushton, PwC UK  
Paul Mark Russell, PwC Australia  
Scott Gorman, PwC Australia  
Shamela Kylassum, PwC UK  
Stuart J Harvey, PwC UK  
Stephen Finestone, PwC Canada  
Tim Stahl, PwC Canada  
Tracy Pemberton, PwC Australia  
Vivian Muniz, PwC Brazil

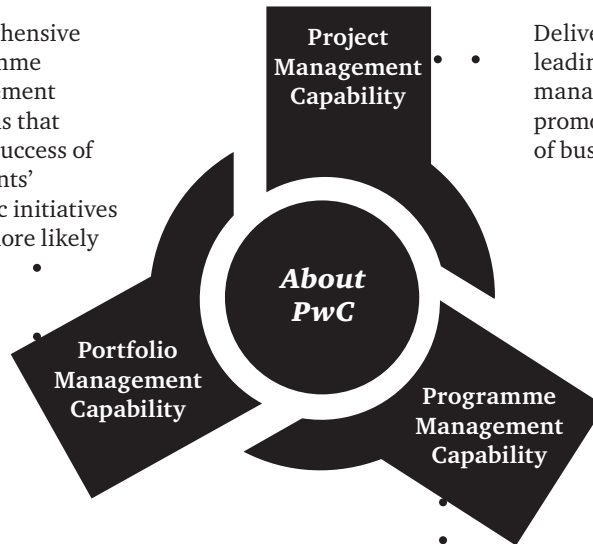


# About PwC

*PwC's Portfolio and Programme teams across the globe offer solutions for our clients who are looking to drive successful transformational programmes, more efficiently manage complex, enterprise programme portfolios and programmes, and improve overall execution and performance.*

**This includes:**

Comprehensive programme management solutions that makes success of our clients' strategic initiatives much more likely



Delivering industry leading project management services to promote the enhancement of business performance

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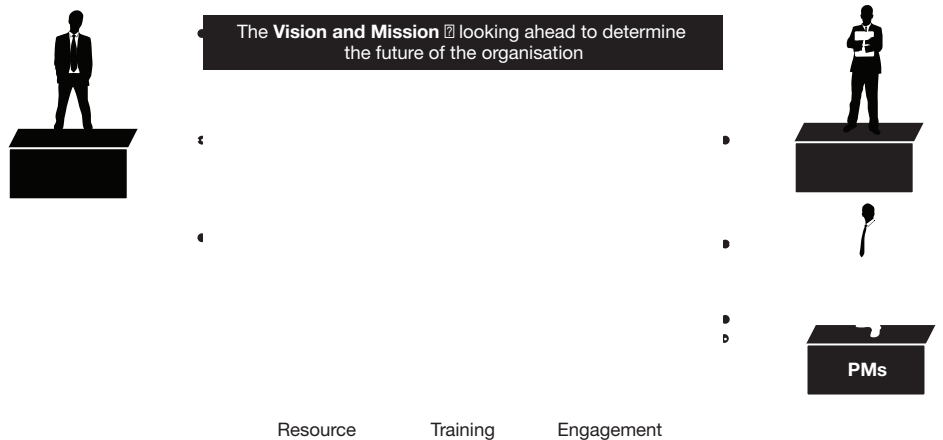


# Glossary

## Phrases and references made in this report

### Perspectives

Throughout this study we refer to different groups of people having different perspectives as illustrated above. Clearly the views should not be seen as so set in stone to believe that no member of an Executive Team ever takes a view of delivery, or that PMs have no concern with Goals and strategy. But it does help to explain why some of the results from the survey look like they do.



### CEOs/C-Suite/Executive Team

In 2014 PwC published its annual CEO Survey based on interviews with Chief Executive Officers across the world. Within this report we refer to this survey as it provides significant context and relevance to the issues faced by PMs all over the world. When referring to this survey we have generically called leaders the 'CEO'.

In the PPM Survey specific questions were asked of the 'C-Suite' by which we mean the executive leadership team of an organisation – the Board effectively. To avoid ambiguity we have referred to this group as the Executive Team'.

### Portfolios, Programmes or Projects?

The majority of this report refers to issues faced when delivering both projects and programmes, and often when managing large portfolios of change programmes.

We refer throughout the report to 'PMs' meaning the professionals delivering change, be it through portfolios, programmes or projects.



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