



Lloyds Banking – Leadership of change

Ensuring that the impact of change is understood and effectively managed is vital to successful integration of Lloyds Banking Group's businesses (LBG). The recent successful integration programme to join Lloyds TSB and HBOS businesses is the largest ever undertaken in the UK and a newly formed change community of some 13,000 members are at the heart of this impressive undertaking.

Opportunity

Providing the right development for this extremely large community is a major undertaking. LBG implemented the Group Change Academy and selected CITI as the company to help design the right development offerings and to be the sole supplier of PPM courses - both industry qualifications/accreditations and core CITI courses, known as 'Beyond Method' courses, which have been tailored for the bank.

Within the Group Change Academy there are four distinct member groups - **Bronze** (project team members), **Silver** (project managers and senior project managers), **Gold** (project directors and programme managers), and **Platinum** (Programme directors).

Approach

Each level has a relevant set of development options available via the Group Change Academy intranet site, with guidance as to the most appropriate learning routes. For example, at **Bronze** level the core qualification is the APM IC, this is backed up by our Understanding Project Management course which helps participants understand how to apply the knowledge they acquired on the qualification course, the APM BoK. Supporting these two 'core' offerings are masterclass workshops in topics such as Risk, Planning, Estimating, that go deeper into these domain areas in short workshop environments.

Higher up the change academy are more involved development offerings, for example at the **Gold** level, the qualifications are MSP® and APM PQ, these are backed by a core CITI programme called Managing Complex Projects. This two-module course is interspersed with Work Based Assignments (WBA) that participants undertake in the live environment between the two modules, these WBAs are marked and feedback is provided by the consultant tutor individually to the participants, which in turn informs the content focus and delivery style of Module 2. Further feedback is sought months after completion of the course to further establish successes and





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challenges with embedding the learning, any organisational level barriers to implementing the best practice learned are fed back to the Group Change Enablement team during review meetings. This process ensures that we achieve Kirkpatrick Level 3 and 4 feedback while making positive, proven improvements to the performance of change within the bank.

Outcome

The most critical member group in the Change Academy is the **Platinum** group; this group is formed of the top 20-25 Programme Directors in addition to which there is the associated community of Accountable Executives that have the role of project and programme sponsors. This member group is responsible for delivering the Bank's largest change programmes, for example the £2.7bn integration of HBOS programme.

Top address the learning requirements at this level, fusing several groups and two organisations, Lloyds Banking Group engaged CITI to help them design, develop, pilot and roll-out a sense of identity and community for the Platinum group; a suite of learning events / interventions to develop capability and insight in their roles; specific forums to share experiences between Platinum members; and, to identify, design, develop, pilot and roll-out mechanisms to support and

develop the Accountable Executives to fulfil their responsibilities to the change community.

Defining the community and identifying entry & exit criteria Deciding on the membership of the Platinum and Gold groups was a crucially important decision. CITI, working closely with members of the community and the Banks Professional Development team, created an entry 'portal' that selected experienced individuals and those growing into role, and filtered out those that didn't meet the agreed characteristics.

There was also an 'exit' portal that kept the community to those actively engaged in Platinum tasks, while not 'damaging' the individuals who were exited. As part of the 'exit' criteria CITI established a scheme similar in nature to 'Continuing Professional Development units'.

Developing a sense of identity and community within the Platinum group there was an urgent need to create a sense of identity and belonging for the Platinum group community as a way to gain commitment and involvement. It was already known that getting individuals away from their desk for even two days was difficult, so credibility was essential when establishing the Platinum forum and the Platinum 'Circle' was born.

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National Grid – capability development

Ofgem (the energy industry regulator) established a remuneration model that prompted a change in National Grid's organisational strategy. One strand of this strategic change was the enhancement of project delivery skills and knowledge across National Grid.

Opportunity

CITI were selected, through a competitive tender exercise, as the best partner organisation to support national Grid in successfully delivering this professional development.

The offerings were developed within the context of the 70:20:10 principle which National Grid have as their underpinning approach to learning.

CITI's extensive experience of practical capability development meant that a genuinely blended suite of interventions based on individual assessments, offered development routes for all four recognised levels of capability within the organisation. These ranged from e-based learning, through formal classroom-based courses, to dynamic, delegate-determined seminar-based styles of delivery and for the more senior individuals 1:1 coaching.

These offerings were further enhanced with practical work-based assignments and follow-up work, mentoring and coaching in order to promote the effective application of the learning in the workplace.

All the offerings were created to sit within the professional development framework. This formalised and highlighted many of the non-classroom based development activities available to the project management community.

Outcome

The offerings and development approach supported the project delivery community on their journey in:

- enhancing their skills and knowledge to enable them to more effectively support and deliver National Grid's strategic aims – ensuring everyone is the best they can be
- becoming more competent in project and programme management
- developing a high performing culture in a way that best suited each individual and National Grid.

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Public services – an innovative formula

Construction and capital programmes giant Atkins is working in partnership with CITI to create a fresh approach to supporting major projects and programmes.

Opportunity

Support offices — known by various names — are often seen as the Cinderella of the project management world. Sometimes they are used simply for administrative work; but a good PPSO can do a great deal more, ensuring that best practices and procedures are followed, and providing effective guidance for project managers. A PPSO can be the place where experienced project and process experts reside, providing advice and support to all project managers, and helping to raise the game of the whole organisation.

The PPSO can also set organisation-wide standards. This ensures that all projects report in a consistent format, allowing senior managers to identify the key issues, and make effective decisions on priorities, resource allocation and strategic goals. A good PPSO can make the critical difference by providing senior management with visibility and control over their key projects and programmes. It can also act as the

organisation's long-term memory and repository of learning, and provide a link to sources of best practice knowledge and experience that keep the whole organisation up to the mark in programme and project delivery.

Approach

CITI and Atkins worked together to professionalise the PPSO, liaising with leading professional bodies to provide career paths that will establish the PPSO — just as much as project management itself — as a career with recognised standards of excellence, and not just a short-term job.

First fruit of this alliance is the recently announced five-year contract to provide a Programme and Project Support Office (PPSO) for Government Communication Headquarters (GCHQ). The service will combine Atkins' experience in running project support services with CITI's state-of-the-art expertise in programme and project management.

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L&G – Professionalise Project Community

Legal & General plc (L&G) has engaged CITI many times over the years in a number of its businesses to provide project, corporate portfolio and programme management education and consultancy.

Opportunity

Legal & General Group (a FTSE 100 company) is one of the best known and respected financial services companies in the UK. They are a leading provider of risk, savings and investment management products in the UK, with nearly seven million customers worldwide.

In response to a rapidly changing business environment in their Individual Protection business, they needed to improve their capability to deliver change. We were asked to outline an approach to assess their current change capability, benchmark this against similar organisations, and design a targeted development programme that didn't impact current priorities of the business.

Approach

"The classic training model, taking individuals out of the business to sit in a classroom for a week at a time,

was not going to work for us" says Jane Logie, Strategy & Development Director, "but at the same time, we knew we needed to raise our game in managing change". This is a current business issue for many of our clients – the need to develop capability, without the capacity to take large numbers of the change community 'off-line' to attend training courses.

"CITI were a good choice for us" continues Jane, "having worked with them before, we knew they were able to deliver high quality support coupled with leading edge advice and people. The main attraction of their approach has been the quality of the benchmark data used in assessing our current capability - allowing for extremely targeted development, and the way in which the development has been delivered in-line with business pressures."

The key to success was indeed the way in which the development programme was designed and delivered specifically to suit L&G's environment. Once the profiling element was completed – evidencing strengths and areas for development - project managers were immersed in short, best practice workshops with CITI experts. Delivered over a period of months, these workshops targeted the areas identified for development.



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L&G – Professionalise Project Community

After each workshop, individuals were given the opportunity to apply the best practice in their live project environment through supported work-based assignments. A hugely successful approach, it effectively accelerated the learning by embedding it with delivery. At the same time, it did not increase the risk to any project because these new ways of working were supported with CITI coaching.

Outcome

Reflecting on the engagement to date, Jane says “this approach was far more useful than a week in a classroom. It gave our project managers the opportunity to experience best practice in action, and didn’t distract them from our on-going business and change agenda”. “And I have to say, your people are brilliant”, finished Jane.

Nick Dobson, our Lead Tutor for the programme says “this has been a very rewarding and interesting engagement with L&G, together we were able to explore new ways of meeting today’s challenges and were hugely successful in our pursuit”. The unique approach is being successfully implemented in other parts of the business and we continue to work with Jane’s area to meet a challenging business environment.

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Cayman Islands – Capability Development

Cayman Islands Government – the Strategic Reform Implementation Unit (SRIU) – had recognised the critical importance of transparency in the selection and implementation of projects and programmes.

Opportunity

They felt that core to this was improving business cases alongside the professionalisation of their project management community and the development of overall project capability.

CITI was selected through a competitive tender process to be the SRIU's partner in this capability development programme.

CITI recognised right from the start that this was much more than just running accredited courses. They worked closely with the SRIU team, clarifying their requirements and shaping the series of interventions which would promote individual and organisational improvements in both business case development and project performance.

And – most importantly-would provide measures to publicly demonstrate the changes in performance.

The first pilot-100 group will be completed in early 2019. The engagement has included:

- Capability assessment of current levels of business case / project management knowledge and understanding in the pilot group of 100 staff
- 40 managers completing the accredited APMG Better Business Cases™ course
- 60 managers completing the APM Project Fundamentals Qualification (or APM PFQ)
- Post business case / project manager capability assessment

Throughout these interventions, CITI consultants have provided advice and support.

For a programme of this nature some of the most crucial stakeholders to get access to are the senior managers and sponsors. CITI has already run briefing sessions with strategic leaders providing them with insights on when and how to conduct health checks on projects and how to recognise sound business cases. These were well received and have created the energy and interest necessary to engage more of the most senior managers in SRIU.



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Cayman Islands – Capability Development

Outcome

This pilot development programme has unquestionably raised the profile and importance of business cases and project management expertise across SRIU and CITI's impact is recognised in the comments back from participants.

You can hear more about the SRIUs pilot development programme by clicking this link to the news briefing provided by Dr. Tasha Ebanks-Garcia from the SRIU.

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"The facilitators were amazing and very experienced"

"CITI were a joy to work with"

"...they were so professional"

"The CITI facilitators really cared and managed our expectations – dealing with any learning concerns we had."

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