The Biggest Warning Sign of a Failing Transformation Portfolio

written by Alan Ward | 26 April 2024

I'd written earlier on the [signs of needing Portfolio or Programme Recovery services](#), but I missed out one warning sign on purpose. It's too complicated to describe quickly in a bullet point.

Depending on the scope, e.g. portfolio or programme, take a look at these three elements:

1. the plan,
2. the component parts of the plan and
3. the approach to building the plan.

If the plan has been built left-to-right, then the chances are the initiative will fail.

This may seem counter-intuitive since we typically figure out how long each component task will take and add it up to see what the overall duration should be. However what that approach doesn't take into account is the operation that is being changed, i.e. what's the state of the operation or service at any point in time.

In a multi-year programme, there are likely to be many transition states along the way as the service is matured or improved by the change programme towards the end goal. If the plan is left-to-right, the component tasks rarely align to defined transition states. So you'll spend much of the time figuring out what you're getting, by when and having to create or adjust projects to prepare the existing organisation for the forthcoming changes.

Now compare that to a programme that states the overall deadline and works back to a sensible, defined state before the end, and possibly backwards again to an earlier state Each state becomes its own deadline with activities leading up to that transition state. That's the difference, the activities each lead to defined transition state, so you know what the operation will look like at any particular point in time and you'll know what the activities are leading to the next transition state.

This works across all sectors. It doesn't matter if we're talking manufacturing, health, government or service industries. There's always a service that's being changed.

You may also hear talk of plateaus. It's a different term from a different set of frameworks (e.g. Archimate) that can be translated as transition states.

So if I find that a programme or portfolio does not have transition states or plateaus, then I start to get concerned. Anything else is detail without knowing where you're heading.