

## **The Digital PMO: Shifting Organizations from Project base to product base organization<sup>1</sup>**

*Article two in a three-part series*

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### **Abstract**

In the first article of this series, we focused on the need for PMOs to become digital to stay valuable for their organization and continue to improve and adopt industry trends; and to be more equipped to support their organizations' digital transformations. We explored the PMOs landscape today and what is expected of them to do and not do to transition to digital and how the internal readiness and external readiness preparation play an essential role in ensuring success in digitalize themselves, and be ready for their organizations' digital shift. In this second article, we will explore what it means to be a product based and differentiate the areas of focus for a product based vs. a project-based organization. We will step through the required elements for a successful transformation and explain the details for each of these elements. Further, leverage a specific organization transformation to share the challenges and benefits from a product-based model, and explore what changes the new model will make to ensure success, and what are the expected outcomes and measures. Finally, the success of the new model relies on the orchestration of the various functions namely the EPMOs/PMOs and explain the reason they need to be re-invented, as well as the for a new oversight function to be setup to support the product-based organization in the digital landscape.

**Key Words:** DPMO, DMO, Journey, Platform, Product-based, Project-based, Agile.

### **Introduction**

Nearly two-thirds of CEOs and senior business executives already have a digital business transformation initiative underway at their organization. Some 90% of corporate leaders view digital business initiatives as a top priority, but 83% are not making any meaningful progress (5).

Organization differentiate themselves based on their business model, PMO is a business model that some organizations created to seek differentiation in the way they

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deliver products and services, or in the way they optimize on their strategic investments while maintaining the lights on for their operation. The main problem that many organizations face today in the digital transformation is the operating model which impacts the PMO regardless of the PMO digital to gain the anticipated benefits.

In Deloitte's most recent industry 4.0 reports, 48% of executives indicated that introducing new business models was one of the top five topics discussed most frequently within their organization, yet only half of those leaders consider themselves ready for new business model. The business model has become the basis of competitive differentiation in creating, delivering, and capturing value in the digital realm (2). According to the 2019 Gartner CIO Survey, enterprises are changing their business models and requesting help from the IT function to do so. Forty-nine percent of the organizations surveyed reveal they experienced business model change, with 13% reporting they have already changed and 36% in the process of changing (5).

One of the most popular models that are on the rise is the product-based organization. Businesses are making a model shift in becoming a product focus organization rather than a project focus organization for many reasons; one of the primary reasons is the digital disruption and what it means in delivery expectations. What does it mean to be a product-based organization?

### **What is a Product Base Model?**

Product management is an organizational function that guides every step of a product's lifecycle: from development to positioning and pricing, by focusing on the product and its customers first and foremost. A product-centric approach has been the core of digital transformation, according to many industry experts. The Product management approach allows an organization to focus on one owner from strategy to execution, and matches customers to providers, and deliver sustained outcome. Organizations adopting a product-based model can concentrate on business alignments with strategy and outcome empowering single ownership and accountability, as well as sustained delivery resulting in value streams (7).

### **Why a Product Base Model?**

Many organizations have recently shifted to a product base and many others are in the process of going through this transformation for many reasons, mainly to stay competitive as their rivals make the shift and reap the benefits of this new alignment, The top benefits gained from product base are: collaboration between teams that are collocated, harnessing the knowledge gained and the skills acquired, and continuity of delivery. Further benefits to the product model are:

- Continuous innovation and optimization of resources skills
- One single point of accountability centered in the product owner
- Results and outputs focused, based on outcomes aligned to customers' needs
- Dedicated teams with functional knowledge allow for SME stability and continuous delivery
- Improved risk oversight and transparency with faster decisions
- Structured annual spend based on a fixed capacity provides a realistic picture of what can be delivered annually
- The amount of work performed rely on a pull model, vs projects following a push model to get job done
- Minimal amount of project interdependencies lightens the interactions and provide autonomy were needed to manage the product journey
- Simplified interaction models with other products or organization functions allow for better visibility and transparency

### **Challenges of Product Base Model**

- Lack of executive commitment or diminishing executive commitments
- Rigid organization structure and undefined interaction model
- Extreme changes in the organization funding model or lack of changes
- Portfolio alignment and benefit tracking (product vs. project/program)
- Project and program work overlap with product work leading to redundancy
- PMOs/EPMOs current role not ready to support digitalization
- Believed to be a temporary team structure similar to projects/programs

### **What does not change in the new model?**

- The revenue generating financial model and construct, and its allocation
- The need to effectively balance cost, value and risk
- The finite availability of funding
- The requirements for financial controls, and compliance to accounting policies
- The ability to deliver value via improved business outcomes (ROI)
- The need for having portfolios, programs and projects
- Following accounting guidelines for labor capitalization

### **What happens to projects and programs?**

As we see it, projects and program practices are still needed as ever. The move to a product base doesn't eliminate the project work; however, the way work elements performed, and the behaviors required to perform them, should be focused on products,

not projects. The focus is primarily on the hierarchy of the operating model where projects become part of a product journey, or large-scale programs could be cross-cutting across multiple journeys and platforms. As a result of the new operating model, a major shift in the funding model/process is required. In addition to the funding model change, the resource model needs to evolve to align with the organization products not projects.

The top drivers to success in the product model are continuity as a result of having a permanent and dedicated workforce, close collaboration because of having a reduce number of span of layers and an increase in the span of control, and value-based decisions. Another major point plays a huge factor is how removed project teams from the strategy, nor the benefits promised, the creation of too many layers in the PMO and the organization operating model keeps line staff, project managers included in the dark as far as organizational goals, strategies, investments, and ROI.

The concept of spend envelop that comes with minimum funding requirements for the permanent team structure allow the teams who developed expertise in this are continuous delivery and that model was not possible due to the rigidity of the business case ties to a particular initiative. The change in governance model to value-based outcome performance, allows business to commit to value-outcome and be measure accordingly. The value-base has been a challenge for many organizations, even those organizations that have a mature portfolio practice, since the traditional value-based has been the triple constraint as a measure of performance. The interdependencies are focused on journeys and platforms, improving the interactions and connectivity of the various business areas.

The final point of differentiation is the focus of what we call the toolbox “methods and processes”, the focus in the toolbox in a product is more inclusive than the project base that focused on cumbersome customized singular methodology, the objective is fluid adoption to various methods and toolkit that can co-exist and provide alternatives and address exception. Figure 1 shows the key elements of differentiation between project and product.

	<b>From Project Base</b>	<b>To Product Base</b>
<b>Time</b>	Temporary Structure	Permanent Structure
<b>Funding Model</b>	Through Business Case	Through Spend Envelop
<b>Work Approach</b>	Push approach, change focus	Pull approach, change and run focused
<b>Team Dynamics</b>	Team disbands when project is completed	Team stays together beyond the project
<b>Governance</b>	Time, Cost, Quality, Scope	Value-based outcomes performance
<b>Risk Management</b>	Temporary team, Delivery focused	Dedicated team, continuous delivery and operations oversight
<b>Interdependencies</b>	Across projects and programs	Across journeys and platforms
<b>Health and Status</b>	Status reports against triple constraints	Performance monitoring done against the value-based outcomes
<b>Toolbox</b>	SDLC, Waterfall, Iterative, Agile.	+ Scaled Agile, Design Thinking, Lean Startup, Product Management (Agile)

Figure 1: Behavior between products and projects

### Exploring the New Product Base Model

The new model exploration consists of an organization’s journey into transforming the way of working from a project base to a product base and what pillars have been put in place to ensure success. The summary of the main components are: funding, resource allocation, talent re-skilling and up-skilling, structure and governance, business case, risk and change management, portfolio management. We will explore each of these pillars and provide insights into the elements required for each pillar.

**Funding**

Funding is prioritized at the Journey and platform level first, as seen in figure 2, through the concept of spending envelope, and not at the project level as traditionally been the case for many organizations. Further, the structure of the organization governance is enabling to implement this type of funding model. The funding aligns with the strategic importance of the business capabilities that each journey and platform supports; as well as, their respective expected value-outcomes to be delivered for the year. The executive product/ platform owners determine the corresponding breakdown and prioritization of the work within their journey and platforms. During the year, each product family spends the allocated money to meet the value-based outcomes they have committed. A single Journey/ Platform owner receives a funding envelope each year that does not fall below a minimum level to run the business which allows for fixed capacity and long-lived resources and knowledge.

The benefits of this model are: realistic model based on fixed capacity, keep the lights on funding is secured, changes to funding is performed collaboratively with all executives/ owners of journeys/platforms, and digital experience (CX/DCX) for customers and employees at the heart of each journey and platform.

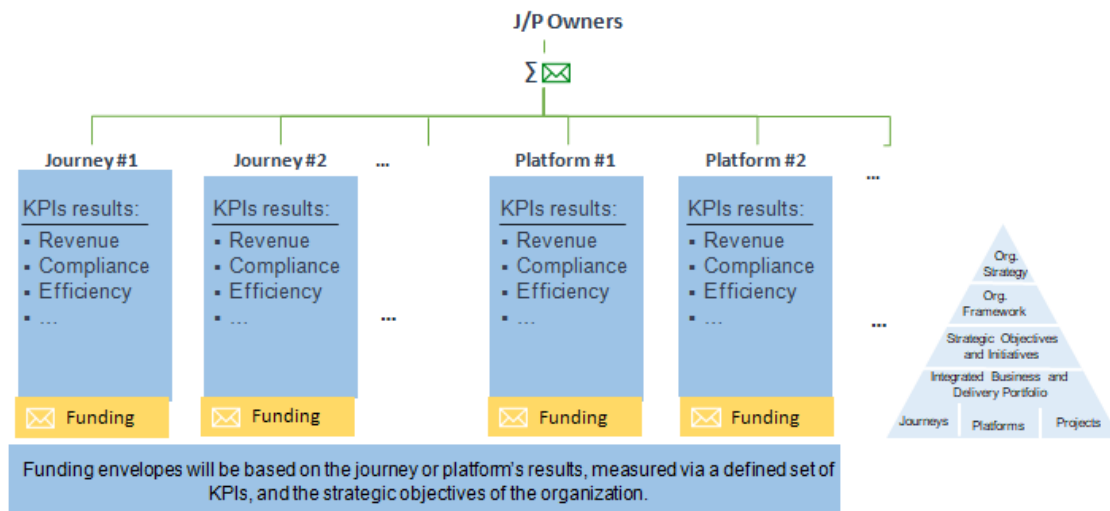


Figure 2: Funding Model by Platform and Journey

**Talent Re-skilling and Up-skilling**

Re-aligning the business and technology teams under one product-based organization is not enough. For the model to succeed, the adoption of Design Thinking, Lean Startup, Agile at Scale (e.g., SAFE, LeSS, etc.), Agile product management, DevOps, and many practices are required to be adopted. Other technology engineering domain shifts are also needed. For example, mostly for the business side of the equation, the

change to having dedicated product owners requires a significant up-skilling of the workforce on agile product management. For the project management workforce, this could mean re-vectoring to new jobs and career paths, like moving into Solution Train and Release Train engineers, Agile coaches, Scrum Masters, and in some cases, moving into a product owner role. For technology, examples of such a shift would be for the traditional application development organization moving into a software engineering discipline. Alternatively, there will be a need for new engineering disciplines like Site Reliability Engineering, Full Stack architects, or Quality engineering

### **Resource Allocation**

Resource allocation and reallocation model focuses on value-based outcomes. While resources are planned part of funding, allocating for minimum business work (keep the lights on) allow to prepare the remaining fixed capacity and distribute the work accordingly factoring skills as well. Resources working based on fixed capacity eliminate the need for intensive time tracking, on-going resource management, resource request process of other groups, gating forums etc. Organizations have a realistic picture of the capacity of the resources, and can plan for resources increase or priority shift accordingly.

### **Business Case**

The “spend envelop” model will replace the traditional business case. Organizations will fund work at the level of the journey and platform roadmap, supported by a scorecard with agreed KPIs. The time horizon of the roadmap contributes confidence that short-term work aligns to currently envisioned, long-term business priorities.

Executive product/platform owners own their allocation decisions in coordination with principle business, technology and stakeholders. At the Product level, team budgets are fixed and transparent to the agreed to duration increments, and these teams showcase their work on a regular cadence (through the Release Reviews). The approval of large and complex projects or programs that cut across journeys and platforms done in a more traditional manner: through project/program-level value statements and business case. Once approved, the program managers and project managers will need to work through the respective Journey or Platform owners to insert their project work into the backlog so that teams continue to get their work prioritized by their respective product owners.

### **Governance Structure**

Governance cadence will drive value to the product owner, as seen in figure 3. Budget allocation for products/ platforms is set annually in line with the company’s strategic



priorities. Through-out the year a multi-tiered review cycles will ensure all checks and balances are in place, and all stakeholders at the various levels have input, contribution, and interaction. Overall governance will focus on financial performance, progress against products, and showcase successes in pre-established KPIs, challenges, and trade-offs

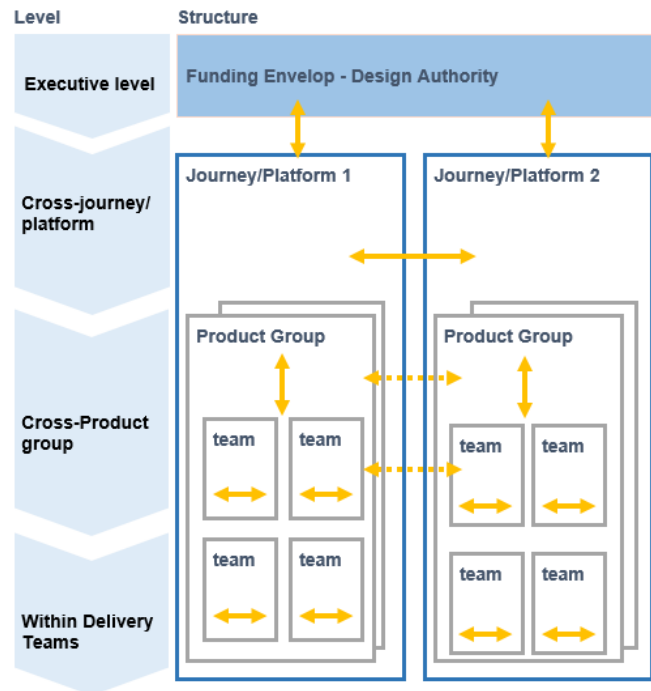


Figure 3 – Product base Governance Structure

**Risk Management and Organization Change Management**

Risk management and change management will be embedded in every journey and platform. Replacing multi-risk teams for every project or product with a singular risk organization that is dedicated, co-located, and funded by each of the respective journey and platform they support to ensure that each journey and platform certified as operational. The risk function is accountable to solve for most of the risks and control issues and escalate to the second line of defense per the governance model if they can't resolve or need guidance.

**Project Portfolio Management (PPM)**

Portfolio management alignment will be with the journey and platforms vs. projects and programs. PPM leaders will focus on digital value-add activities to support and enable their digital organization transformation. More PPM leaders are looking to double the percentage % of time they spend on critical events such as (engaging senior stakeholders, supporting cross-functional digital business initiatives, and



importing/exporting skills and knowledge across the enterprise) over traditional activities (3). In the transformation to a product-based organization, it is essential to focus on working with journey and platform owners on prioritizing based on value through stories, epics, or features across the organization and ability to aggregate and report accordingly. Also, not losing sight of the cross-organization projects/programs which do not go away, and they need to be accounted for. The advantage of adopting such thinking allows for bottom-up and top-down approach to PPM, which wasn't possible to achieve in the traditional PPM model.

### **Expected Outcome of the New Product Base Model**

One of the vital outcomes is the synchronized organization view of all work components cutting through all journeys and platforms; hence, allows organizations to focus on business outcome reporting empowering business owners to showcase the success of their business based on the products they deliver/ support. Secondly, Success is measured based on specific and agreed upon KPIs, allowing platform and journey owners to be measured objectively based on the KPIs performances of the approved roadmap. Thirdly, the ability to pivot direction due to holistic change management and risk management by having dedicated teams analyzing the impact of changes and risks on the overall journey and platform success. Fourth, because there is a decrease in the number of span of layers and an increase in the span of control, a lot more work gets done because of having the hands-on individuals closer to the decision-makers. Finally, improving skills and performance through collocated and integrated teams with SME knowledge of the specific product are focused on value stream delivery.

### **Why Roadmap is a critical artifact to all journeys and platforms?**

A roadmap focuses on the value of a journey or a platform proposes to deliver to organization customers to rally support and coordinated effort among stakeholders. The roadmap is not a project plan, but a strategic communication tool, a statement of intent and direction, that focuses on outcomes rather than features and dates.

A roadmap should:

- Put organization journey or platform plans in a strategic context
- Focus on delivering value to the customers (or to journeys or other platforms, if you are a platform)
- Embrace learning as part of a successful product development process
- Rally the journey/platform around a single set of priorities
- Get customers and employees excited about the journey/platform direction

At the same time, a journey/platform roadmap should not:

- Make promises that teams are not confident they will deliver on
- Require a wasteful process of up-front design and estimation
- Be conflated with a project plan or release plan

### **Does the PMO have a Role in the New Model?**

The fact remains that alignment of strategy is not done well; organizations have been adopting various new ways of doing business to achieve alignment. 74% of projects still fail (8). Some organizations tried separating the portfolio practice from the project practice on the hope to focus the strategy delivery vs. tactical project/program delivery. In today's landscape, EPMOs/PMOs are struggling to maintain strategic presence even those that have PPM as a function within the PMO are losing grip on the PPM activities. PMO leaders are still busy with traditional activities: Process focused, staff skills development, managing projects and programs, and involved in PMO annual planning (3). The traditional focus imposes Scope limitations on PMOs /EPMOs; as a result, struggle to increase the % of attention to strategy, digital activity, enablement of digital programs makes the support of a product base model organization almost impossible.

Does that mean the end of PMOs as we know it today?

In the previous article, we focused on the digital PMO readiness in two main areas: internal readiness to digitalize themselves; second, external readiness to support digitalization. In the new product-based model, a fresh look is required at the function supporting the transformation and the sustainability of the product base organization in the digital era. PMOs that aren't able to digitalize themselves and support their organization in the new model, they will remain in the traditional role. Even the traditional role will need to be upgraded to incorporate digitalized elements.

Traditional PMOs/EPMOs will have a significant role to play for large and complex cross-functional regulatory type of initiatives. Then a transitional DPMO is needed as a transformation office to establish all the required digitalization elements, and can dissolve when the organization achieved its objective from the transformation. The last type may drop the "P" for project as the mandate for the DMO will be different in supporting the product-based organizations' needs. Figure 4 shows a summary of the Different functions and expectations around funding, resource allocation, governance, business case, and change and risk management.

	Traditional EPMO	Transitional DPMO	Permanent DMO
<b>Funding</b>	Once and Annual	Dynamic Funding	Spend envelopes
<b>Resource Allocation</b>	Push	Push and Pull	Pull
<b>Governance</b>	Traditional	Dynamic	Dynamic and Frequent
<b>Business Case</b>	Once and done	Dynamic	Non-existent
<b>Risk Management</b>	Temporary	Temporary	Dedicated
<b>Change Management</b>	On-demand	On-demand	Dedicated

Figure 4: Summary of the different supporting functions PMOs and beyond

### **Traditional EPMO**

PMOs/EPMOs have traditionally overseen the standardization of project and program management practices for their organizations, whether these PMOs had a PPM function reporting directly or indirectly to them. In this traditional role, PMOs are expected to provide status report, monitor and control the health of project and program delivery. Oversee the resource demand and budget allocation across PPM if they have oversight for the PPM. Establish governance cadence and escalate the issues and risks that impede strategic execution. Track PPM benefit realization to ensuring projects and programs align with the organizations' strategy. This rigid structure is based on functional or matrix organization and will not be able to cater for the more fluid structure consisting of multi-structural dimensions as required by the product base model.

### **Transitional DPMO**

In addition to the traditional focus, DPMOs with digitalization are more capable of supporting the transition to a product base model. The focus of these PMOs should shift to digital value activities in the three areas of people, process, and technology, which is consistent with the product value stream and strategy realization.

- PEOPLE (Drive cultural change towards product base value, Improve talent management, Support pull/push resource model, obtain executives support)
- PROCESS (Improve process agility, embrace Agile mindset, re-align PPM with value activities and outcomes, support dynamic business case evolution)

- **TECHNOLOGY** (Maximize existing tools use to mature digitalization, Transform static data into real-time knowledge)

Organizations are expecting their DPMOs to manage the digital transformation via established programs. To achieve the required program results, a separate digital office created which can be temporary to enable and support organizations' digital transformations. Resource allocation should be a pull and a push and allow the organization to staff dynamically; similarly, the funding model should move away from the ridged business case to more fluid and dynamic funding mode. DPMO can be external/outsourced, internal/permanent, or a mix of internal and external. Once the Digital transformation is accomplished, The DPMO can potentially be dissolved, and some of the activities built- in place need to be picked up by a permanent function. These DPMOs are hybrid PMOs between traditional EPMO and the new DMO.

### **Permanent DMO**

The requirements of the new organization don't focus just on projects; therefore, to call it a PMO, whether Enterprise or Digital would be misleading. While the need for EPMOs is still needed per the above, the need to stand up a new unit that supports, facilitate and operationalize all the front end work that ties to the customer experience through agile product management. For new cadences and routines, the Digital Management Office, DMO will facilitate and orchestrate decision making ability, but not the product execution and monitoring of performance which should remain within the respective businesses.

The Focus of the DMO is to build a lasting organization function that will support the operationalization of product journeys and platforms leveraging "New Ways of Working" and leading to maximize the flow of the value stream and balance the risks of changes. The digitalization aspect of this function is pivotal and being the liaison and the connector between all organizations CoEs is a crucial feature; therefore, the DMO has far more important structure and role to play over a traditional EPMO, or a transitional DPMO as seen in figure 5.

Pillar	Activity
<b>Understand the Customer</b>	Understanding the customer is done through Voice of the customers with analytics and common metrics
<b>Develop the Customer Experience Strategy</b>	Done through customer insights (Lean Startup, experiments, etc.)
<b>Design the Customer Experience</b>	Done through managing personas and journeys (develop/maintain journey maps, user experience, and testing)
<b>Build a Customer-Centric Culture</b>	Done through mindset and behaviors - leveraging A/B Testing, Behavior-driven Development (BDD), Test Driven Development (TDD), etc
<b>Manage the Customer Expectation</b>	Done through continuous KPIs and measures. Measure experience and help prioritize technology investments
<b>Lead Product Management Practice</b>	Done through maintaining product vision, product roadmap, epics, value-based outcomes roadmap, release plan, performance scorecard
<b>Coach @ scale</b>	Owns and deploy Solution Train Engineers, Release Train Engineers, and Agile Coaches to journey and platforms
<b>Establish new Cadences</b>	Establish and orchestrate the quarterly, monthly, adhoc reporting, releases, and review routines

Figure 5: DMOs Pillars and Activities

## Summary

The second article focused on what it means to transform organizations from a project based to a product based. We explored the challenges and rewards accompanying this transformation and the areas of focus for each project vs. product differentiating the areas of focus which can be summarized in: funding, resources, business case, status check, governance, etc. An important point in our article is the type of organization functions that exist today and need to be re-invented, and the need for a new oversight function to be setup to support the product-based organization in the digital landscape. Firstly, the traditional EPMO/PMO still very much required, but with a more focused role into digitalization. Secondly, the transitional DPMO will exit to lead and support the transformation of an organization and it's a hybrid function between the traditional EPMO and the DMO. Lastly, the new Digital function being the DMO will be the center of orchestration across all CoEs within the organization (PMO, EPMO, Agile CoE, etc).

The main success factors for this DMO are: the strategy realization and value stream delivery. DMO is a function that connects changes, risks, and provide the cadence

required to journeys and platforms, and report on the performance of the enterprise, including journeys, platforms, and other work components. The final article in this series will provide a case study of an organization that succeeded in this journey and share their experience to benefit other organization in their industry or any other industry for the matter.

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**Dr. Wafa Karkukly**, PhD, MIT, PMP, ACP, CMP has over 20 years' experience in IT, and Project Management. Wafa has helped fortune 100, midsize, and small sized organizations improve their project management practices and PMO establishments through building scalable standards and proven solutions that improved their delivery process. She held many positions ranging from big 5 to small startups where she held the responsibility of managing IT strategy and operation; in her career progression she became head of PMO with titles ranging from director to VP, responsibilities ranging from \$50 million to \$1 billion in Enterprise assets for global and international organizations.

Wafa is a strategist and change agent who had many organizations' transformations in building agile organization culture and building CoE for IT organizations. Wafa teaches various beginners and advance project management and IT courses at various Ontario universities and colleges. She is a program and curriculum lead developer for variety of topics aligning education certificates with practical industry needs and trends.

Wafa holds a BSC in Information Systems from DePaul University, an MIT from Northwestern University, and a PhD from SKEMA School of Business. She is a Project Management Professional (PMP), Agile Certified Professional (ACP), and Change Management Practitioner (CMP) who is dedicated to improving the understanding and standards of project management practices especially in the Value proposition of Strategy execution via Portfolio Management and PMO.

Wafa is an active PMI member who has held various positions of Director of Communication for the PMOCOP and Regional communication coordinator for the PMOLIG. Wafa was one of the committee members that built the standards for PMI-OPM3. She is a volunteer and an Academic Reviewer for PMI's academic paper proposals selection. She contributes often in project management publications and is a frequent speaker in project management chapters and forums.

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In over 20 years he has held senior positions leading business and IT transformation through turnaround, realignment and revitalization within international distribution, manufacturing, insurance (Life and GI) and banking industries. Before joining TD, Ian held diverse Information technology, Project Management, and leadership roles at Canadian Bearings. He has also held executive technology roles with Aviva Insurance, which included Change and IT Strategy, EPMO, Management Information & Analytics, and he has led Commercial Lines business transformation and the implementation of a business and operating model for Aviva's Digital business.

Ian graduated from New York Institute of Technology with an MBA in Global Management. Ian's leadership thinking has also been recognized as part of the top 50 thought-leaders in change excellence, and he has been published in *2014 Project Management Best Practices: Achieving Global Excellence – 3rd Ed* (by Dr. Kerzner), collaborated in *2012 Managing the PMO Lifecycle*, by Dr. Karkukly, and many other recent PMI article and publications on standards.

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