BUSINESS INTEGRATED GOVERNANCE

Guidebook for CxOs who want to improve strategy delivery

BIG

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FOREWORD

Foreword

My name is David Dunning, and I am the lead author of the Business Integrated Governance (BIG) Body of Knowledge (BoK). My background is in portfolio, programme and project (P3) management (P3M) consulting and systems. I am also the Chairman of a small IT company, and my interest is in ensuring the business purpose is being addressed by strategic changes, proposition development, and business performance.

For many years I saw the disconnect between strategy and delivery in many organisations. Few of these organisations had the appetite or ability to close the gap sustainably.

Since 2018 I have spent my spare time engaging people who also believe there is opportunity to improve the fundamental connections between strategy and delivery. We concluded that there is **significant wisdom available** in every domain including strategy, governance, P3, product management and information technology – but what was missing was a framework to integrate governance and accountability with all the necessary components to make integration operational and sustainable. Therefore our purpose evolved to collate **additional wisdom** with regards to integrated governance.

We started from the P3M perspective. Two of the key people helping in this were **Alex Shapley** and **Martin Samphire** – who are introduced below. Many others supported our development workshops. Our first outputs were collated into the Praxis Website working closely with **Adrian Dooley** to produce what I now call BIG - V1.

However, the P3M perspective did not fully address the connection from business purpose to strategy, product management and agile delivery methods. Further engagement with members of the governance, risk and compliance, strategy and product management communities followed to create a broader vision. (Four of the people who helped in these areas were **David Booth, Pamela Schure, Adrian Pyne** and **Lindie Grebe** – introduced below.) The result of further workshops and presentations is the BIG BoK - V2.

The development of the BIG BoK was achieved through the vehicle of a Community Interest Company (CIC) – a social enterprise that is the owner of the BIG BoK intellectual property for the benefit the public rather than private shareholders. The scope of the BIG BoK includes Key Concepts, Principles and Components – and provides a clear framework to for an organisation that wishes to improve strategy delivery using integrated governance and accountability. It references other bodies of knowledge as the source for expertise in constituent domains. One of these domains is information and data, and **Chris Bragg** has supported the initiative from that direction.

Lastly, one more person – **Andrey Malakhov** has supported the initiative extensively since 2022. He joined the BIG CIC to further develop the BIG BoK and a Readiness Model, enhancing both content clarity and visual appeal. His mission, like most founders, is to ensure these concepts resonate with a broader audience, making it easier for them to understand and implement BIG ideas seamlessly.

In addition to background, purpose and scope, it is customary in a **foreword** to invite a respected individual to write about the publication and highlight the importance of it from their perspective. They might summarise how the content benefits the community. However, in our case, there are many communities, so I have invited a number of respected professionals to comment, which I have summarised below:

Adrian Dooley:
Portfolio, Programme, Project Management

I have worked in project, programme and portfolio management (P3M) all my working life and believe that the effective delivery of projects is fundamental to the way society operates. Without successful projects we wouldn't have the healthcare, infrastructure or technology that enables us to function as we do now and function as we want to do in the future. Of course, not all projects go well, and we need to do all we can to improve success rates. Personally, I believe that we have a lot of the tools we need but, for mainly cultural reasons, are lax at applying them. It is for that reason that I founded the Praxis Framework that seeks to break down the barriers that prevent good P3M practice being effectively applied. Of course, P3M does not exist in isolation, it must interface with strategic and operational areas of any business or organisation. Governance is vital to ensuring that all these areas are managed consistently, effectively and ethically, and naturally, must be integrated across them.

It is for these reasons that I first became involved in BIG. Not only is it a necessary component of making society work but the ethos of the founders of BIG and the founders of Praxis Framework match perfectly. Devise good practice that can be adapted to different contexts and make it freely available to everyone. Don't create barriers to it being adopted and embedded in the fabric of everything we do. Having been closely involved in version 1, I am delighted to see how others have taken it forward and developed version 2. Long may this approach to developing and promoting good practice continue.

Adrian Pyne:
Agile Beyond IT

For much of my nearly 40-year career projects have mostly if unconsciously been treated as viruses in the organisational body. They have been the square pegs in the round holes of Business as Usual (BAU). Organisational governance for example was not engineered for temporary projects, even less so for longer term programmes. Annual complete reworking of business cases is just one instance of mostly nugatory activity that takes away from a focus on value delivery. With the projectisation of work, projects are increasingly becoming part of BAU. The BIG model is a major step towards the proper integration of projects as part of BAU. Enabling both project and continuous activity to be driven from strategy and operationally budgeted, resourced and led in a unified way.

The BIG Framework also provides an opportunity for both project and business agility. Project success has always depended both on what happens inside a project and on the surrounding organisational landscape. The workflow from strategy through delivery in the BIG Framework potentially enables a culture of agility to be built and sustained. If the BIG Framework is used in conjunction with all 4 Values and all 12 Principles from the Agile Manifesto, to drive an integration of the Organisation, People, Processes and supporting Technology components, the result will be a highly flexible, adaptable approach that fosters high performance, collaborative and creative teams and just enough leadership at all levels.

Alex Shapley:
Governance, Portfolio, Programme, Project Management

I have known David Dunning for many years, and in this time, we have worked together on some APM initiatives, and discussed diverse concepts such as: Strategy to Delivery, Knowledge Management for PPM, Benefits Management, Core P3M Data, as well as many different takes on Optimising Portfolio Management. I have always found David's contributions to be thought provoking as well as value-adding.

My 30-year career has been focussed on P3M (Project, Programme, & Portfolio Management) across many industry sectors and cultures, mainly in the Recovery space (e.g. Taking over failing PPM initiatives 'mid-flight').

In 2019 David approached me about joining a small group of like-minded individuals in a voluntary initiative, that would develop a credible coherent framework for better enabling the running and the changing of the business in harmony – e.g. Business as Usual and Projects &

Programmes working together most effectively whilst utilising the same resources. It was clearly understood that anything produced by this voluntary initiative would be given to the public domain. Over the past few years this voluntary initiative has produced the BIG Framework (as described in the BIG BoK). The BoK provides the 'glue' that connects Run and Change, and much, much more for a whole organisation. This 'glue' includes: single version of the truth, seamless information flows (data/content), golden thread (see how every data point connects and then be able to see everything it connects to), information-pertinence (the user is only shown the information that relates to them, prioritised – no more 100-page board packs!), and most importantly Business Agility.

In my career I have worked in quite a few organisations that have tried on their own to tackle (some of) the pain-points that BIG puts to bed, and there were some small successes. However, for a myriad of reasons, none of these attempts were truly successful, and the primary causes of these failures were 1) going it alone and not having the bandwidth to develop a coherent framework like BIG, & 2) corporate technology was not mature enough at the time, especially with regards to inter-connectivity.

Working on BIG has been a satisfying opportunity to develop a framework which can realistically reduce or negate some of the recurring pain-points that are common across all of the industry sectors and cultures I have worked within.

Andrey Malakhov:
Portfolio, Programme, Project Management

With over 20 years' experience in various Project Portfolio Management (PPM) roles, spanning from Project Manager and Head of PMO to Managing Partner of a PPM consulting company, I've consistently sensed a significant gap between strategy and projects.

In the PPM community, PPM is often considered the primary tool for strategy delivery. However, the reality is that strategy delivery is a much more intricate endeavour, one that can't rely only on siloed project, product, or Business as Usual methods. Instead, it requires a holistic approach to governance that seamlessly connects and effectively steers the organisation towards its strategic objectives.

It all starts with a clear strategy that an organisation can easily break down and disseminate to those accountable. It then involves establishing the necessary governance structures, accountable individuals, streamlined processes, support units, and tools. It also requires unwavering leadership, so that these capabilities can be integrated both vertically and horizontally across the organisation.

Our initiative, referred to as BIG, aims to incorporate the tools already available in portfolio management, program management, project management, product management, and other relevant domains into a transparent BIG framework. This framework offers a comprehensive view of the potential factors that can enhance holistic strategy implementation, without needing to provide a one-size-fits-all (or fits nobody) management solution.

For PMO professionals, BIG offers more options for how a PMO can position its role and services within the organisation, not only for operational value, but also as a strategic catalyst that connects the strategy on paper to execution.

I am confident that this comprehensive approach using BIG will enable organisations to accomplish their strategy delivery.

Chris Bragg:
Information Management

Strategy execution means driving planned value realisation through projects, products, and operations, with sustained feedback loops across all three to close the 'Plan, Do, Check, Act' strategy cycle. To work as one team, with a shared focus, everyone needs to act continuously on:

- strategic changes he/she is accountable for

- recognising dynamic strategic directions and performance outcomes in everyday decisions

- collaboration across functional dependencies related to strategy including support, contribution and services

My investment of time (since 2019) with the BIG Initiative has been driven by lessons learned following ± two hundred management teams over multiple years as they developed and implemented strategy with varying results. Three key success factors stand out – shared focus, strong governance, and knowledge sharing (which is the glue that binds integration and governance)

We found the time taken to collect, collate and prepare data from the lowest levels (e.g. project or operational performance) for input to meetings at progressively higher levels often led to excessively long periods between reviews. Delays in information, and related confidence issues severely constrains the possible effectiveness of strategy execution decision-making and the coordination of this decision-making across disparate units. A common shared pool of data that is "always on", is as close to 'real time' as possible and fit for purpose means data can be pulled as and when needed, rather than relying on data

to be processed and pushed by others before we can act. Governance can use this same data to validate that the strategic process is being followed, has integrity, and can be fused to drive continuous improvement of processes and behaviours)

The BIG BoK offers principles and a framework of components that offer an evolutionary and stepwise path to drive sustainable strategy execution success based on accountability and data-driven decision making.

It has been a pleasure working with this team to build the kind of guidance needed to ensure the sustainable adoption of effective strategic performance management practices into the BIG BoK. I am sure everyone in any way involved with strategy execution will find useful ideas and suggestions in the BIG BoK.

David Booth:
Strategy Journeys

It is so very important to have an organisation-wide integrated approach to strategy, especially in 'making it happen', which is where I think the BIG approach has the potential to be very powerful. BIG provides a framework to help organisations develop a 'joined-up' way of managing their strategy delivery, based on clear principles. As always, it is the conversations, and subsequent actions that these stimulate, that matter. BIG can provide the platform for this process.

Katy Angliss,
Assistant Professor, University of Warwick:
Author, Strategic Portfolio Management

As a significant contribution to strategy implementation and with governance and assurance being a key part of portfolio management, this BIG publication is of great importance and critical in further developing this key area of organisational strategic delivery.

Dr Lindie Grebe,
Senior Lecturer, University of South Africa:
Good Governance Academy

This body of knowledge is the product of a combined effort of industry leaders who came together to produce a distillation of years of experience and what was learned in the realm of business-integrated governance. Ineffective organisational governance leads to ineffective strategy development and delivery. We identified a need for a business-integrated approach to governance that would help us achieve greater strategy accomplishment and improve business agility.

Our intention was to develop an all-inclusive body of knowledge that describes business-integrated best practices for good governance to a broad audience. By taking a business-integrated governance perspective, we acknowledge various activities across business levels and processes that combine towards effective strategy delivery. This view also identifies different stakeholders, such as corporate governance practitioners who spend their time as agents of the various codes of corporate governance in everyday business.

Corporate governance used to be seen as a compliance-driven check-box process. By paying attention to the interaction between business governance (such as strategy development, implementation and delivery) and corporate governance, the business-integrated governance body of knowledge contributes toward good governance overall. It helps businesses obtain a social license to operate from their stakeholders to become legitimate members of modern society.

We said that it is time for governance to transform itself to be more integrated. This body of knowledge will thus prove to be a valuable resource for corporate governance agents to keep current with new and leading-edge ideas and practices globally.

May this very exciting business-integrated governance BoK give our field a renewed perspective and awareness.

Martin Samphire:
Governance, Portfolio, Programme, Project Management

I have known David for over 20 years and have worked closely with him and the CIC in shaping the content of BIG.

The failure rate of projects, and reasons for failure, are little different now to 30 years ago. The reasons cited are mainly issues of poor governance. There is thus a strong correlation between good governance and more successful projects. I would contend that one of the main reasons that governance fails is because organisations, at times, do not enforce learning from past mistakes and successes – they become 'comatose'. In addition, the environment into which projects are delivering is becoming more dynamic so organisations need to be more agile and flexible in their governance response. "I've started so I'll finish" is no longer an appropriate strategy.

The overriding objective of governance of project management is to ensure an organisation achieves change successfully (to support its purpose) with confidence, transparency and control. It should ensure that the organisation is aware of risks, minimises project failures and maximises the beneficial outcomes (value) from their overall portfolio of

projects in a sustainable and transparent manner. Therefore, the overall responsibility and accountability for good governance sits firmly with the Board, which can then delegate certain accountabilities and decision responsibilities through a hierarchy of well-defined governance bodies. Clear governance roles and accountability is a core element of the BIG approach.

Following good governance guidelines has to be demonstrated from the top to bottom of an organisation – it is not the accountability of a project manager. Those in senior and leadership positions in an organisation hold the key to better governance through their roles as sponsors and being part of accountable governance bodies.

I commend BIG as the blueprint for their input into this essential part of business life.

Pamela Schure:
Product Management for Dummies

I first started working with BIG in the context of integrating product management processes and practices into the original project and programme focus. This meant acknowledging that a successful approach differs depending on the type of product or project as well as the chosen organizational outcome.

Product management with its frequent companion area of agile product development has often lacked strong governance models that help keep work on track so that it meets the strategic outcomes. At the same time, the product and agile focus on stable teams is a better organizational paradigm that project and programme specialists could learn from.

With product analytics, OKRs and Agile's ability to deliver business agility as well, BIG creates a bridging framework so that product and project can sit at the same table with the same view of what is valuable and what success looks like. We all want to deliver strategic outcomes. Maybe we now have a way to do it in a more integrated framework.

Finally – in my opinion – there is nothing more important to an organisation than being clear on purpose and defining a strategy to achieve purpose. That being the case – the next most important thing has to be the mechanism and culture within an organisation which enables the purpose and delivers the strategy. From personally engaging with strategy, governance and change professionals, I know it is widely believed that strategy delivery is not done well (to say the least). Looking at the details of their pains, many of the strategy delivery issues can be addressed with systematic governance and accountability.

The BIG BoK will help beneficiaries to agree the need to do something, make a case, define what is necessary, and manage systematic change across the organisation. Step 1 is to engage an appropriate sponsor to take up the cause…so good luck to you readers – please let the BIG CIC know how you get on!