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趋势的力量
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— The Power of Trend
2017 项目管理大会
Project Management Congress 2017
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23-24 SEP. 2017 Shanghai · China

Project Management Institute

• 项目集管理在世界一流企业中的管理实践分享

• 演讲人：曹流

世界一流企业的项目集管理实践分享

复星医药

制造管理总监

PMP资格

PgMP资格

精益六西格玛黑带

曹流（Elves Cao），毕业于上海交通大学，工学硕士。

曾先后任职于美国强生公司，上海医药集团等企业，现就职于复星医药集团，任运营管理部制造管理总监。

长期致力于制造业流程改善类项目与项目集的实施和推广，于2015年认证国际项目集管理PgMP资格。是PMI（美国项目管理协会）项目管理体系（PMP，PgMP，PfMP）的积极倡导者和践行者。

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议程

- 项目、项目集以及项目组合的区别
- 项目集管理实践

项目、项目集以及项目组合

项目、项目集、项目组合的战略价值

做世界的美的；致力于成为国内家电行业的领导者，跻身全球家电综合实力前三强，使美的成为全球知名品牌

为人类创造美好生活，为客户创造价值、为员工创造机会、为股东创造利润、为社会创造财富

产品领先、效率驱动、全球经营

T+3，产品精简型号，渠道的扁平化，技术的突破，CDOC

制造效率提升，资源效率提升，自动化信息化，去产能去库存

5年申请3.2万个专利

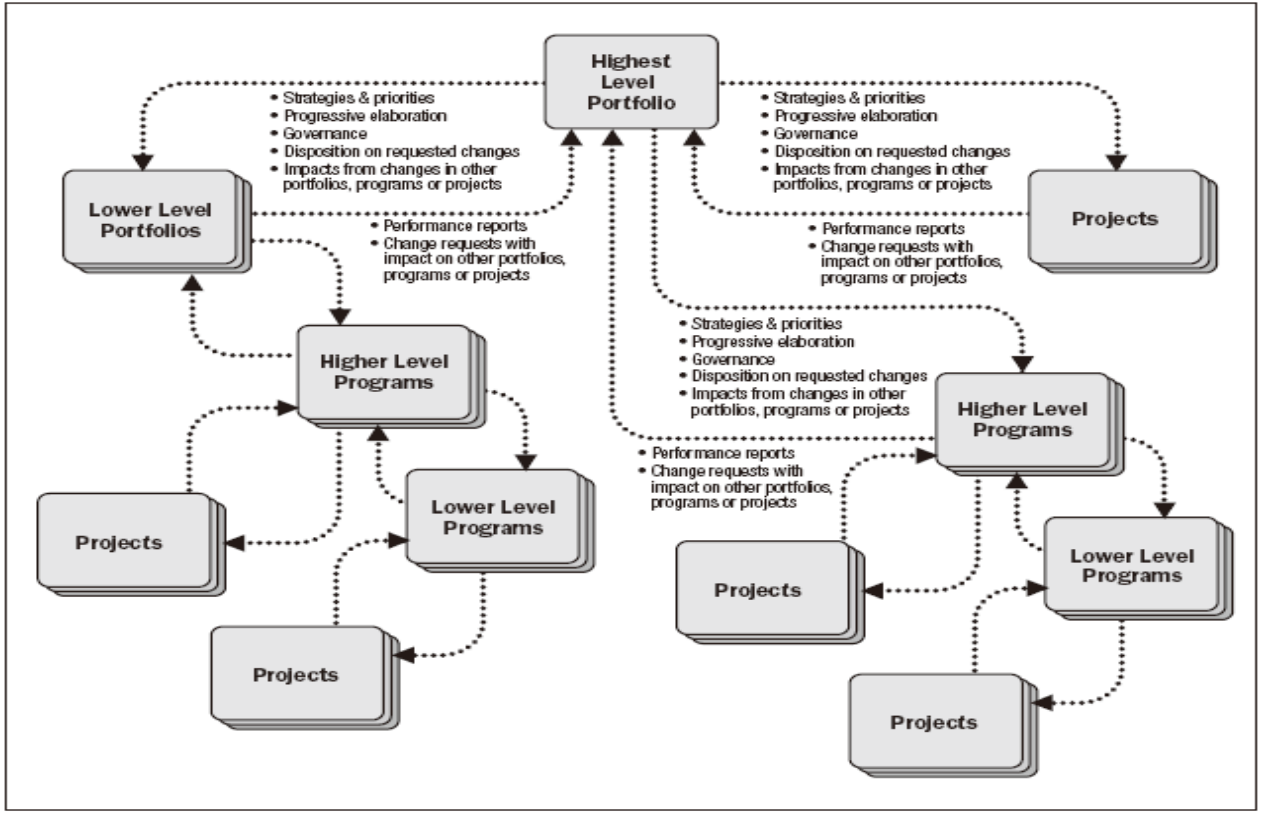
项目、项目集、项目组合的定义

•项目组合（Portfolio）： a collection of projects, programs, sub-portfolios, and operations grouped together in order to facilitate the effective management of that work to meet strategic business objectives

•项目集（Program）： A group of related projects, subprograms, and program activities, managed in a coordinated way to obtain benefits not available from managing them individually

•项目（Project）： A project is a temporary endeavor undertaken to create a unique product, service, or result

项目管理层级结构



Portfolio Management:
Strategic business objectives 战略目标实现，关注于做对的事情

Program Management: Group of Projects 一系列的项目集合，关注于把事情做对(较大收益)

Project Management:
Individual projects 单项目，关注于把事情做对(较小收益)

项目、项目集合项目组合的区别

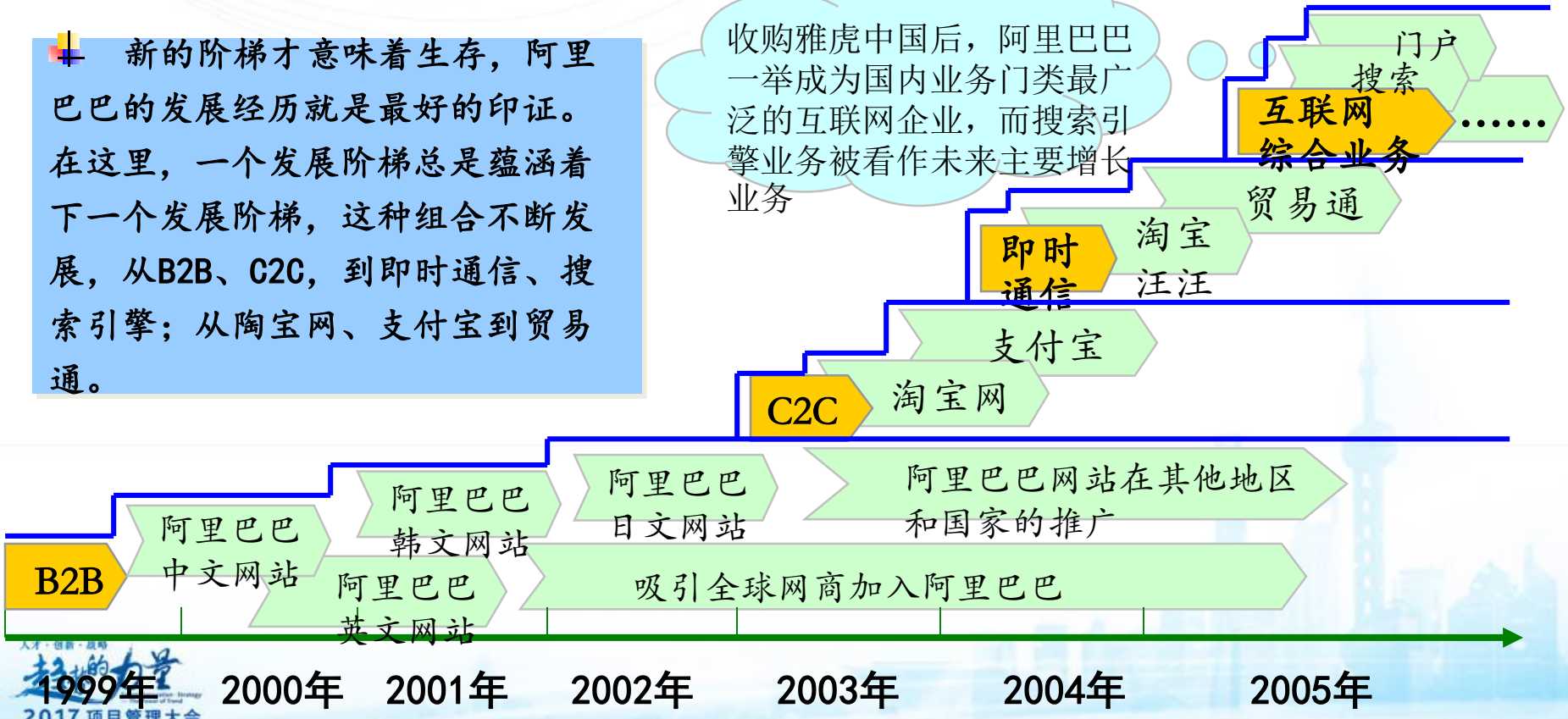
Organizational Project Management			
	Projects	**Programs**	**Portfolios**
Scope	Projects have defined objectives. Scope is progressively elaborated throughout the project life cycle.	Programs have a larger scope and provide more significant benefits.	Portfolios have an organizational scope that changes with the strategic objectives of the organization.
Change	Project managers expect change and implement processes to keep change managed and controlled.	Program managers expect change from both inside and outside the program and are prepared to manage it.	Portfolio managers continuously monitor changes in the broader internal and external environment.
Planning	Project managers progressively elaborate high-level information into detailed plans throughout the project life cycle.	Program managers develop the overall program plan and create high-level plans to guide detailed planning at the component level.	Portfolio managers create and maintain necessary processes and communication relative to the aggregate portfolio.
Management	Project managers manage the project team to meet the project objectives.	Program managers manage the program staff and the project managers; they provide vision and overall leadership.	Portfolio managers may manage or coordinate portfolio management staff, or program and project staff that may have reporting responsibilities into the aggregate portfolio.
Success	Success is measured by product and project quality, timeliness, budget compliance, and degree of customer satisfaction.	Success is measured by the degree to which the program satisfies the needs and benefits for which it was undertaken.	Success is measured in terms of the aggregate investment performance and benefit realization of the portfolio.
Monitoring	Project managers monitor and control the work of producing the products, services, or results that the project was undertaken to produce.	Program managers monitor the progress of program components to ensure the overall goals, schedules, budget, and benefits of the program will be met.	Portfolio managers monitor strategic changes and aggregate resource allocation, performance results, and risk of the portfolio.

项目集和项目的区别：

- 范围是否定义清晰
- 收益是否显著
- 对待变更的态度和管理方式
- 规划和管理方式
- 成功的衡量方式
- 监控的手段和措施

阿里巴巴发展路线图

新的阶梯才意味着生存，阿里巴巴的发展经历就是最好的印证。在这里，一个发展阶梯总是蕴涵着下一个发展阶梯，这种组合不断发展，从B2B、C2C，到即时通信、搜索引擎；从陶宝网、支付宝到贸易通。



项目集管理实践

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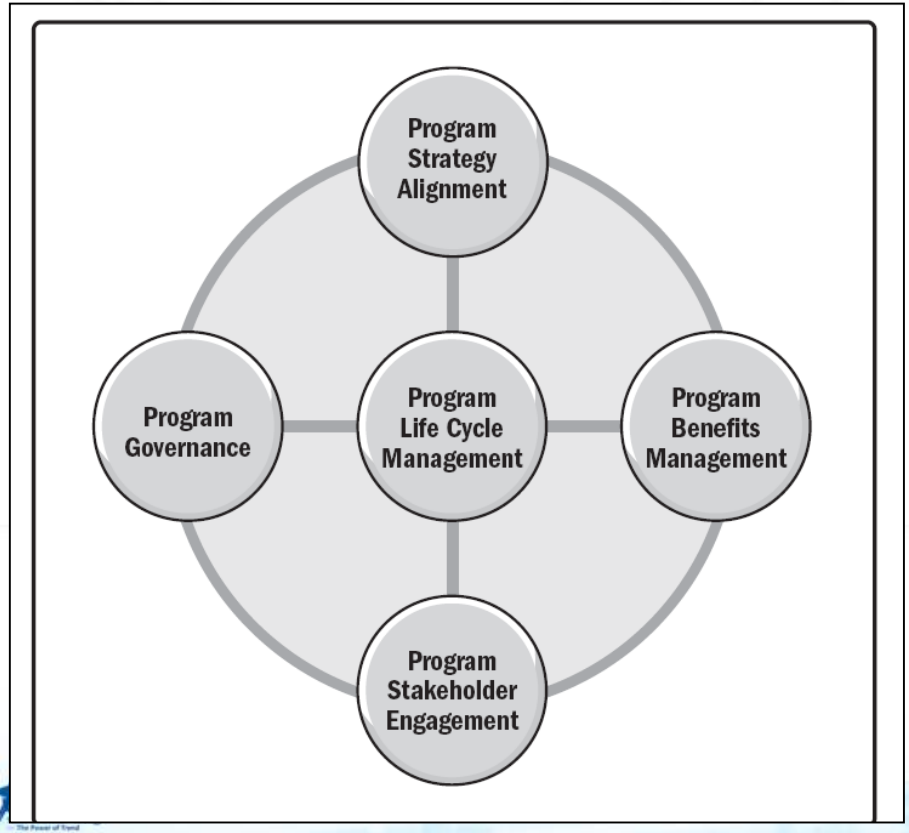
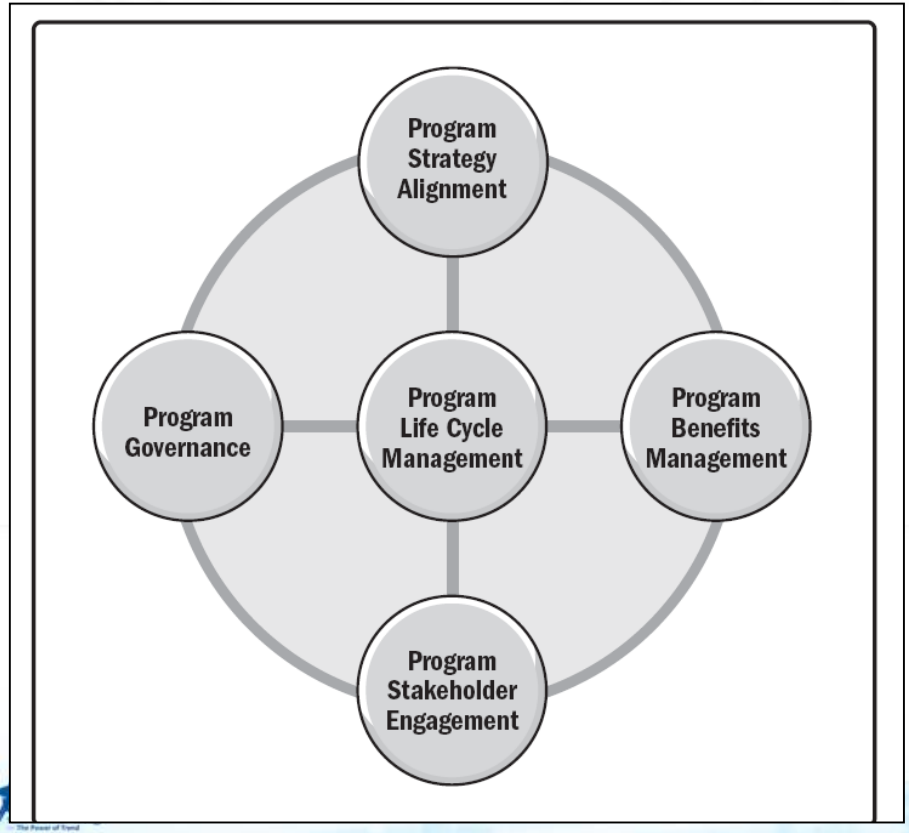
项目集管理体系



项目集管理绩效域（Program Management Performance Domain）

- 战略一致性
- 收益管理
- 干系人管理
- 项目集治理
- 项目集生命周期管理

项目集管理体系



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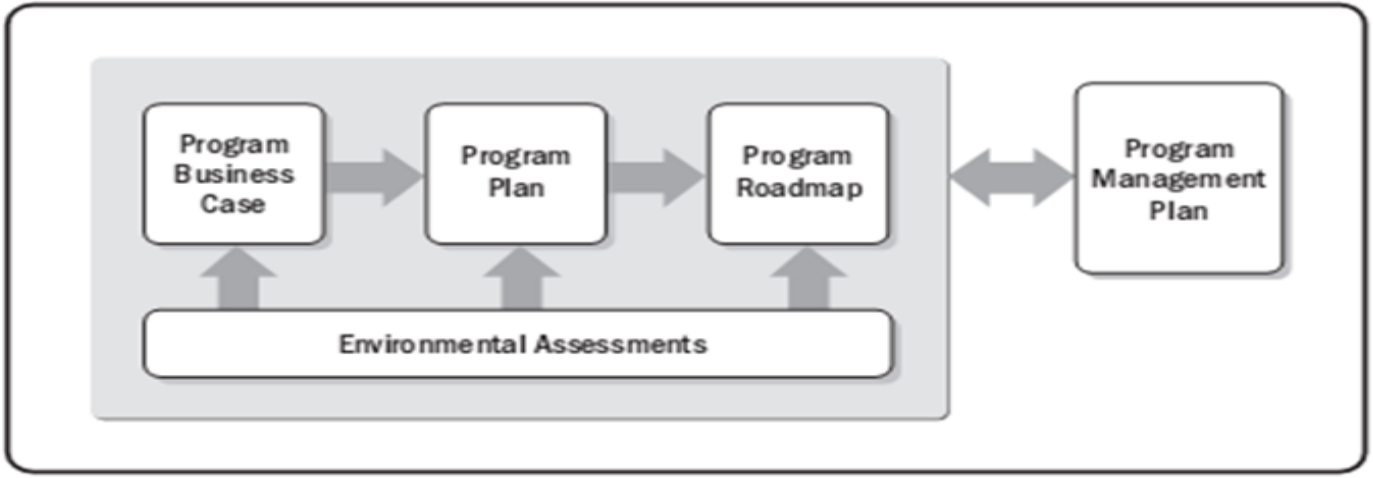
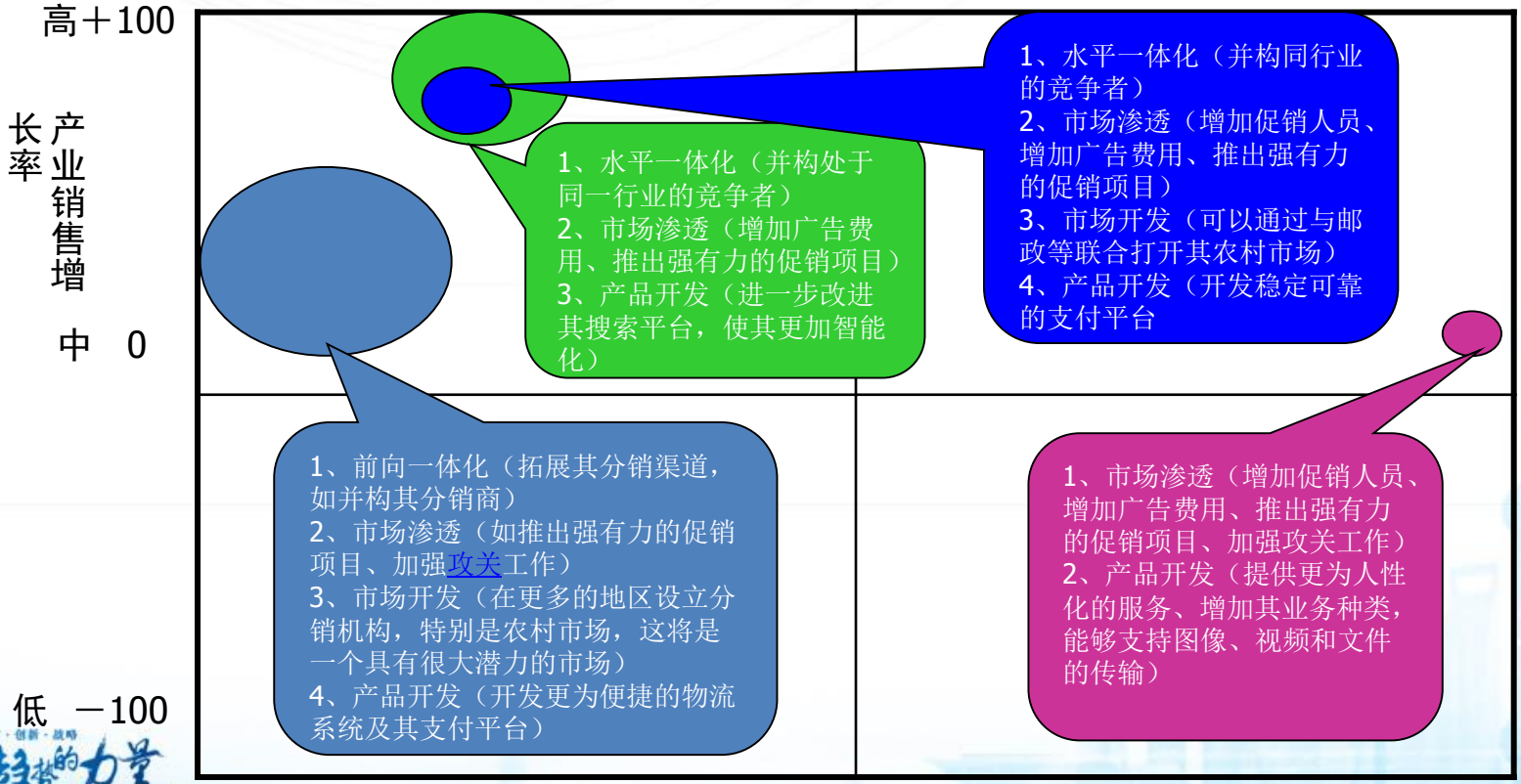
战略一致性管理Strategy Alignment

- 确保项目集自始至终与组织战略保持一致



- 通过详尽的商业论证，借助项目集路线图工具，基于环境分析，确保项目集与战略的一致性

阿里巴巴BCG战略矩阵



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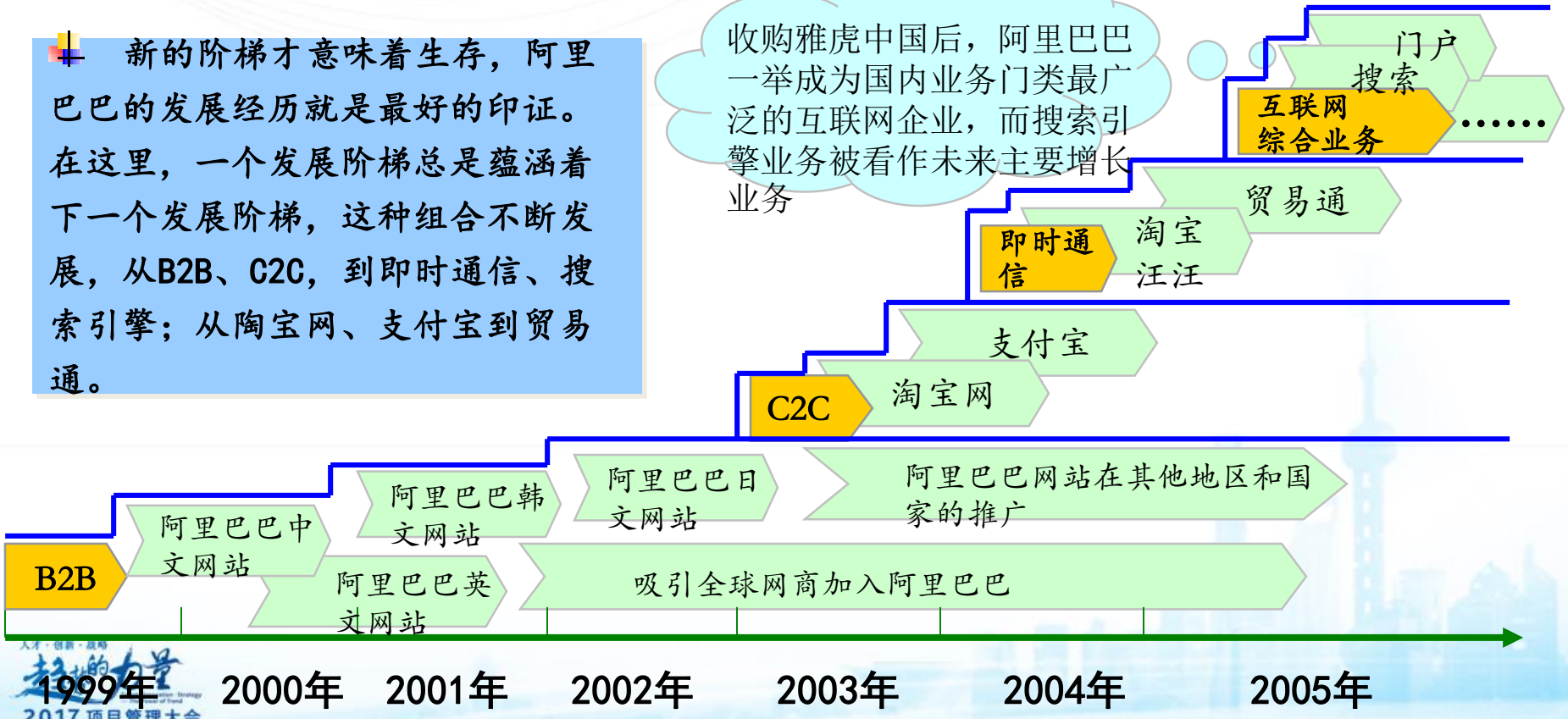


收益管理(Benefit Management)

- 什么是收益？benefits。
  利润额，市场份额，员工满意度。
  单位公里燃油消耗下降/单位时间业务处理量

- 收益是一种更直接的本质目的与需求、更有商业价值的指标；收益需要可量化、可度量。项目集以收益为度量指标

收益(benefits) VS 交付(delivery)

- 交付只是手段，而不是目的。

客户需要是更高的库存周转率，而不仅仅是一个仓库管理软件。

- 收益的达成，可能需要同时启动多个项目来联合达成，单一项目无法达成收益的目标。

譬如波音新机型的单位公里燃油消耗下降。

- 材料改进（轻型化）
- 机身外观的改进（更好的空气动力学）

如何对收益进行管理？

- 收益识别

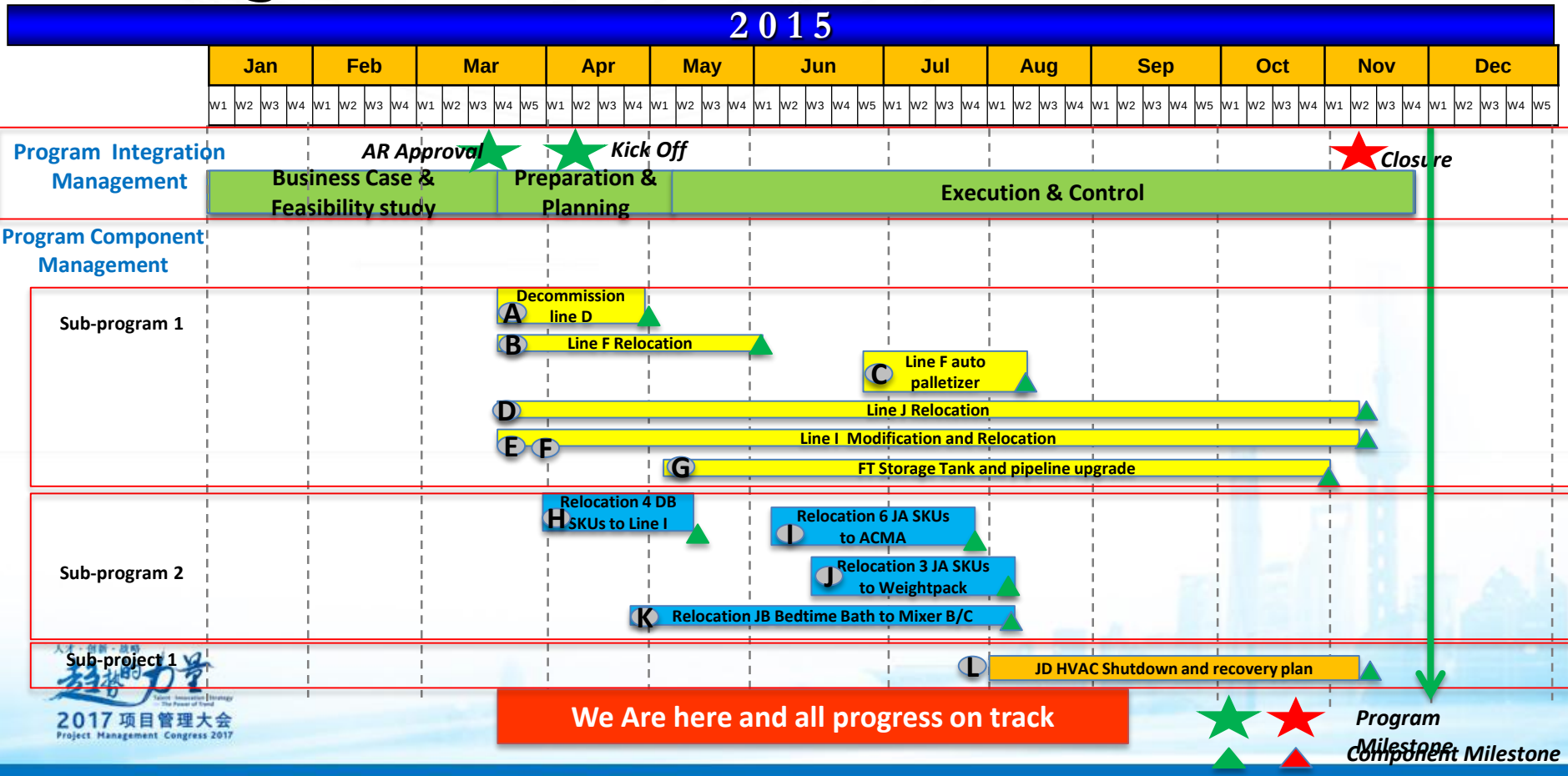
收益登记册

- 收益分析与规划

收益实现计划

- 收益交付
- 收益移交
- 收益维持

Program Master Schedule项目集主计划



Program Benefit Register收益登记表

Benefit Type	Benefit Source	Benefit Value(Annualized)	Benefit Rational
Energy Saving	Component A,B,D,F & L	US $ 147M	- Total 6 months energy saving (Light & HVAC)
OPE Improvement	Component A,B,C,D,E,F,G & L	US $ 117M	- 10 headcounts optimized
Wastage Reduction	Component E,G,H,I,J & K	US $ 79M	– Average Wastage reduction from 1.9% to 1.5% for selected SKU relocation
OEE Improvement	Component E,G,I,J & K	US $ 21M	– Total 334 working hours could be saved by Product portfolio optimization and line I SMED
Maintenance	Component A,E & F	US $ 12M	- Annual maintenance cost saving and line I improvement
Sub-Total		**US $ 376M**	

项目集治理(Program Governance)

何谓项目集治理

- 实际上就是项目集权力的制度性安排。哪些人/团体拥有哪些权力，以及如何执行这些权力？目的是为确保项目集符合其战略与预期目标。
- 项目集治理最重要是定义与划分项目集治理委员会(Governace Board，GB)、项目集经理、组件经理（子项目经理）三者之间的不同权限与职责。
- 项目集治理的安排是个性化的，不同组织可以不同
  同一组织下的不同项目集可以不同

对治理作出规划（governace planning）

- 治理委员会（GB）构成与职责
- 项目集经理的权责
- 项目经理的权责
- 其他干系人的权责（执行发起人、变更经理、PMO代表）

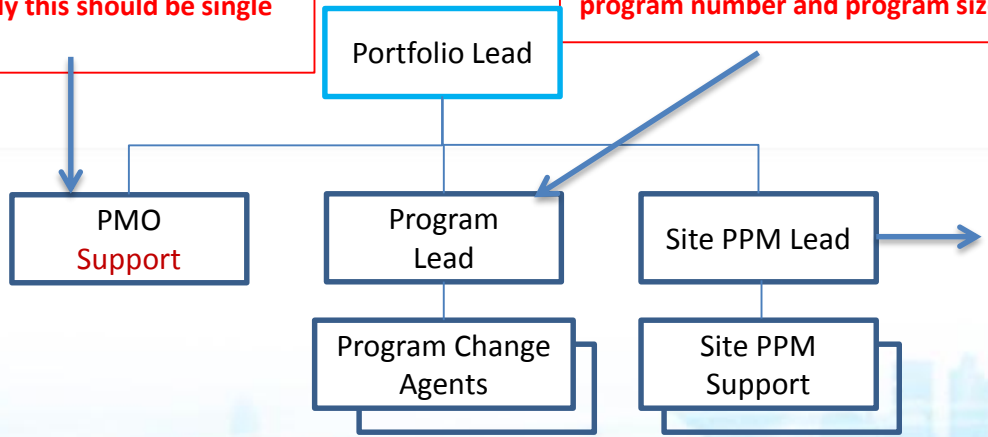
- 对治理会议、阶段关口评审等作出规划
- 问题升级流程
- 组件（子项目）的启动、收尾与移交标准

Typical Organization with PMI framework
项目管理式典型组织架构图

portfolio manager: 项目组合经理
main responsibility is to translate organization strategies into Programs/Projects for implementation

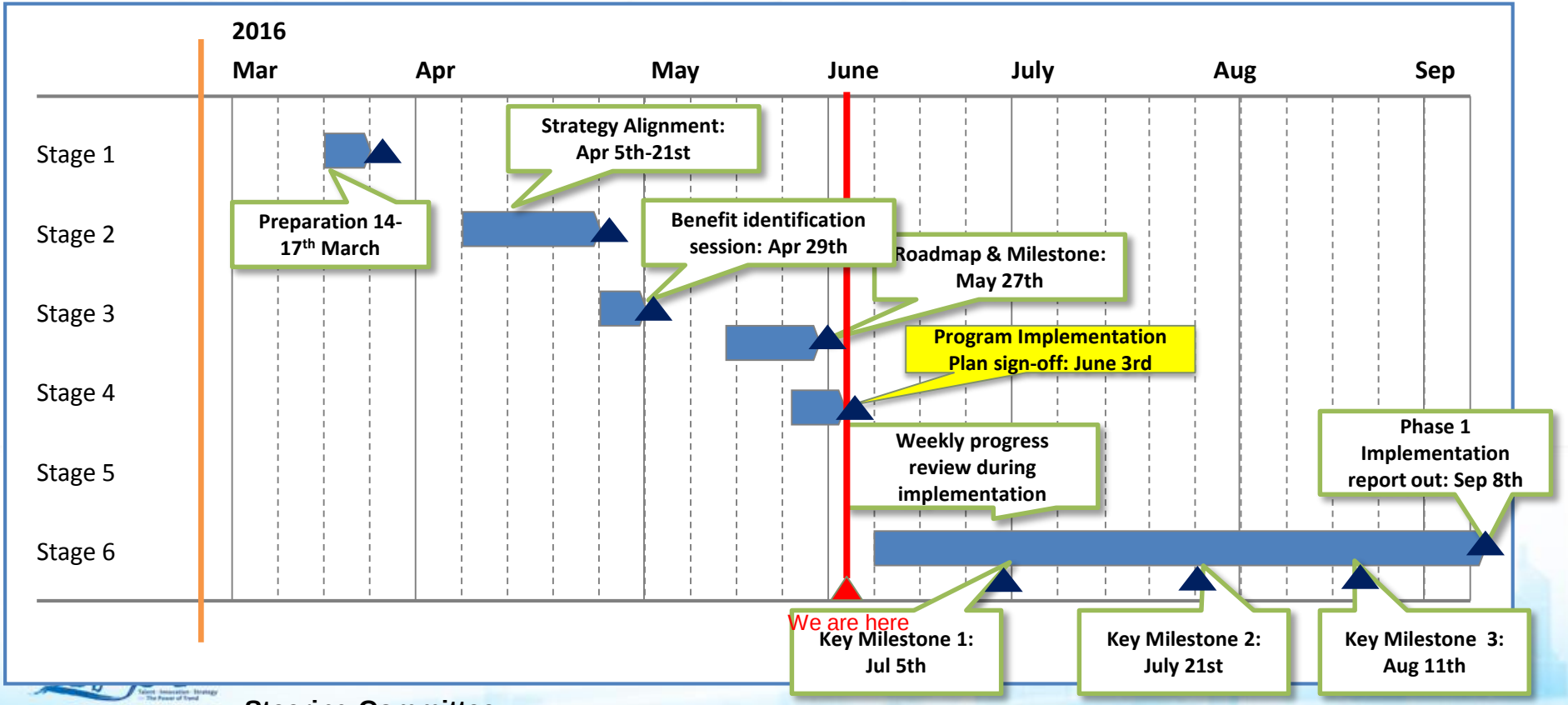
Program/Project Management Office 项目管理办公室is to Provide support, in terms of PM process, templates, and help Leadership for facilitating other activities, this guy has an operational role in this Org, and he will not lead individual programs/projects. **Normally this should be single resource**

Program managers 项目集经理are handling programs, which consist of interdependent projects or sub programs, normally programs are designed top-down to reflect Org strategy, These programs are typically design with stage gate review and health check and last for long time. **Normally this crew size depends on program number and program size**



PPM Managers 项目经理 are for **Portfolio Project Management**. This is team to handle individual and discrete projects. They are treated as individual and have clear defined beginning and end. They can directly support Portfolio strategy realization. **Normally this crew size depends on project number**

Gate Review Process阶段性评审



项目集生命周期管理-人力资源管理

Program Resource Plan													
Sub-Project		Project 1	Project 2	Project 3	Project 4	Project 5	Project 6	Project 7	Project 8	Project 9	Project 10	Project 11	Total Hours/ Week needed
Project Leader		Wade Wu	Anson Li	Li Shusha	Zhang Ming	Wally Cai	Paul Sun	Luke Pan	Rocky	Rocky	Qiu Jinlon	Balen Xing	
Sponsor		Jerry Yu	Cather ine Wo	Stanle y	Chen Dongme i	Tommy Mao	Tommy Mao	Rick	Stanle y	Stanle y	Stanle y	Stanle y	
Func	Name												
M2W	Karl Zhu	2	5	2	2	2	2	2	4	2	4	4	31
M2W	Kevin Xia	2	2	5	5	2	5	2	5	2	5	3	38
M2W	Elves Cao	5	5	5	3	8	2	2	2	2	2	2	38
M2W	Zhang Yim	5	20	8				2					35
M2W	Stevie Liu				5				15		10	10	40
M2W	Qiu Jinglong		20								20		40
M2W	Emily Tao		25										25
MFG	Rocky Pan	5	5						15	10	3	1	39
MFG	Chen Dongmei			5	8								13
MFG	Jerry Yu	5	5	5					5				20
MFG	Balen Xing								8	2	3	20	33
MFG	Anson Li		40										40
MFG	Zhang Ming				10								10
MFG	Li Shushar	2		14									16
MFG	Wu Wade	30		8									38
MFG	Zhao Guorc								8	2	3	1	14
MFG	Stanley Gu								2		1	1	4

通过对项目集中的子项目进行资源平衡，以最合理利用人力资源以实现项目集最大收益

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