

BEYOND THE METHODOLOGY SHELF

HoLiDySt: A Holistic Delivery System

The Framework

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Introduction

Introduction

Foreword — The Long Path

I built my first methodology before I had ever managed a project.

Not long out of university, I was running a methodology centre: management and quality methodologies, distributed information systems approaches, development methods and frameworks. I supervised a long run of degree theses. Papers were published. We built a tool around a single information model held in a repository, feeding different views of the same underlying reality — the sort of idea that looks obvious now and, at the time, did not. The European Community thought so too: it funded the work and awarded the tool as one ahead of its time.

It was a success. Real funding, real recognition, real results.

Then someone asked the ordinary question: "Have you ever actually run a project?"

Silence.

No.

Everything in this book is what survived that question. Tried, adjusted, tried again — kept only when it held in practice. The rest did not make the cut.

Development History

HoLiDySt didn't arrive fully formed. It was built, tested, broken, rebuilt, and refined over nearly a decade of practitioner experience across multinational transformation programmes. Here's how it evolved.

First Edition (2017–2019): The Programme Playbook

The core philosophy emerged from a simple frustration: existing methodologies were either too theoretical to use or too heavy to carry.

The first edition codified a four-phase programme lifecycle (Initiation □ Discovery & Design □ Build & Pilot □ Rollout & Deployment □ Embed & Optimise), a multi-layered governance model, and an initial template library — all built from direct experience running large, multi-country transformations.

It drew on the established body of knowledge — P3M3 for maturity assessment, MSP and PRINCE2 for governance, MoP for portfolio thinking — and asked the obvious but rarely answered question: "What actually works at 11pm on a Friday before a Monday go-live?"

The answer was: a lot less than the textbooks suggest. The first edition was built from what survived contact with reality.

Second Edition (2020–2022): The Maturity Framework

Field experience exposed a gap. Organisations could follow the playbook and still struggle, because they'd never assessed their own readiness to execute it. You can hand someone a governance framework, but if they don't have a culture of governance, the framework becomes wallpaper.

The second edition introduced the 13-dimension maturity model — extending P3M3's seven core dimensions with six modern transformation capabilities: Change Management & Adoption, Transformation Leadership, Agility & Adaptability, Technology Enablement, Data-Driven Benefits Analytics, and Learning & Knowledge Management.

The assessment methodology and heat map approach followed, along with the programme categorisation framework (VL-XS) for right-sizing the methodology. This edition also brought agile and hybrid delivery methods into the framework, recognising that SAFe, Scrum, and Kanban weren't competitors — they were delivery engines that needed a governance home.

Prosci's ADKAR model and Kotter's change management principles were integrated as compatible approaches within HoLiDySt's change management dimension, not as replacements.

Third Edition (2023–2024): The Integrated Suite

A programme playbook, however good, is incomplete if it doesn't connect upward to portfolio strategy and downward to project execution. The third edition expanded HoLiDySt from a single playbook into an integrated three-playbook suite covering portfolio, programme, and project management.

This edition also addressed gaps that practitioners had been working around rather than solving: vendor and partner governance, data governance and management, cultural intelligence for multi-country delivery, and programme recovery guidance for initiatives already in trouble.

Enterprise architecture thinking (TOGAF) informed the maturity model structure. OKRs and design thinking were integrated as modern strategy-to-execution bridges. Integrated PPM platforms became central to the technology enablement dimension.

Fourth Edition (2025–2026): The Complete System

The current edition delivers the full five-volume suite, adds AI governance and sustainability integration, and positions HoLiDySt for digital deployment — where the template library becomes a specification for intelligent delivery platforms rather than a collection of Word documents.

This edition reflects a world where AI-driven PMO tools can predict risks before they materialise, where the EU AI Act requires governance over algorithmic decision-making, and where every transformation must account for its environmental and social footprint.

It also reflects something simpler: eight years of learning what works and what doesn't, distilled into a system that can be picked up by a single project manager or deployed across a global enterprise.

CHAPTER 1

What This Is (and What It Isn't)

What This Is (and What It Isn't)

1.1 The Problem

Let's start with the uncomfortable truth.

Most delivery methodologies fail at the point of use. Not because they're wrong — most are intellectually sound. They fail because:

- They're designed for the library, not the war room. Comprehensive in theory, unusable under pressure.
- They treat every initiative the same. A department automation pilot gets the same 500-page methodology as a global ERP migration.
- They stop at assessment. They'll tell you your maturity is "Level 2" but not what to do about it on Monday morning.
- They ignore the human element. Governance without leadership is just meetings. Process without adoption is just paperwork. A benefits framework without ownership is just optimistic arithmetic.
- They don't connect the layers. Portfolio decisions get made in one room, programme delivery happens in another, project execution in a third, and nobody can trace a line from strategic intent to delivered value.

The result? Organisations spend months filling out maturity assessments, only to end up with a colourful heat map, a 150-page consultant report, and no practical tools to actually improve delivery.

That's not what we're doing here.

1.2 What HoLiDySt Is

HoLiDySt — the Holistic Delivery System — is a practical, modular approach to improving how organisations deliver change. Whether you're selecting the right investments at the portfolio level, running complex multinational programmes, or executing projects efficiently, HoLiDySt provides:

- A diagnostic framework to assess where you stand — honestly, quickly, and without turning the assessment into a second full-time job.
- Three interconnected playbooks for portfolio, programme, and project management — each usable independently, all designed to work together.
- A template and artifact library that eliminates blank-page panic and ensures consistent, high-quality deliverables.
- A categorisation system that tells you how much rigour to apply, so a department pilot isn't drowning in the same governance as a global transformation.

It's designed to be:

- Usable — something you can pick up and actually apply, without needing weeks of training.
- Modular — you can focus on just one area or use the whole framework.
- Value-driven — everything in here should help you deliver better results, faster, and with less wasted effort.
- Scalable — works for a single project or for an entire enterprise portfolio.
- Honest — about what works, what doesn't, and where things typically go wrong.

1.3 Our Hallucination

Our hallucination — what we dream of achieving — is simple:

- A system that's actually used to help deliver change better.
- A framework that makes complex programmes simpler, not harder.
- Tools that let teams focus on value, not on form-filling.
- A shared approach that unites portfolio, programme, and project teams without unnecessary bureaucracy.

And in this same hallucination, we'd also like to avoid the usual traps:

- Binders of 500 pages that gather dust in a drawer.
- Mountains of paperwork that don't help anyone make real decisions.
- Layers of process that slow transformation down instead of speeding it up.
- A framework so over-engineered it needs a decoder ring just to understand it.

1.4 Guiding Principles

Six principles shape every element of HoLiDySt:

Value First — If it doesn't add value, we don't do it. Every template, every governance meeting, every stage gate must justify its existence by contributing to better decisions or better outcomes. If it's just process for the sake of process, it doesn't belong here.

Keep It Simple — Clear steps, clear deliverables, clear accountability. Avoid making it feel like solving a complex puzzle without the picture on the box. Complexity is inherent in multinational transformation; the methodology shouldn't add more.

Global and Local Balance — We define common standards but leave space for regional adaptation. A governance model that works in Frankfurt may fail in São Paulo, and a change management approach designed for London may be tone-deaf in Tokyo. The framework provides the structure; local teams provide the intelligence.

Modular by Design — Pick what you need: portfolio, programme, project, or all three. Use the full methodology or the lightweight version. Start with one playbook and expand when ready. The system is designed to be adopted incrementally, not imposed wholesale.

Continuous Evolution — This isn't "finished" the moment you read it; it grows with your organisation. Best practices evolve, tools change, and lessons accumulate. HoLiDySt is a

living framework — assessed regularly, updated to stay current, and adapted to your context.

Humility and Practicality — We know perfection doesn't exist. We're here to make things better, not heavier. Every principle in this framework was tested against reality, and reality won more arguments than we'd like to admit.

1.5 Who This Is For

HoLiDySt is designed for different audiences at different levels:

- Executive sponsors and board members who need to understand how transformation investments are governed and how value is tracked — start with this volume and the Portfolio Playbook (Volume 2).
- Heads of PMO and transformation directors building enterprise-wide delivery capability — use the full suite.
- Programme directors and PMO leads running specific transformation programmes — this volume plus the Programme Playbook (Volume 3) will be your primary tools.
- Project managers and delivery leads executing within a programme — this volume plus the Project Playbook (Volume 4) and the Template Library (Volume 5).
- Change managers, workstream leads, and regional teams — the relevant playbook plus templates for your domain.

Every volume works alone. All volumes work together.

1.6 The Name

We had to give this approach a name.

We went through plenty of ideas — some sounded long and important, others sounded like they belonged on a sci-fi movie poster. In the end, we landed on:

Holistic Delivery System — HoLiDySt.

It's short, a little clunky, but at least it reminds us that even big transformations deserve a holiday from bureaucracy.

So, call it the Holistic Delivery System, or just HoLiDySt — a holiday from bureaucracy. Either way, we hope it brings you a bit of breathing room while delivering change.

CHAPTER 2

The Landscape: What Came Before Us

The Landscape: What Came Before Us

2.1 Why Frameworks Matter

Delivering change in a complex, global organisation is a moving target. What's "best practice" today may feel outdated in a few years. Tools, methods, and leadership approaches evolve constantly.

That's why any serious approach to delivery management needs a reference framework — not a static checklist, but a compass that shows where you are and where you want to go. A framework provides:

- **Clarity:** A structured way to discuss strengths and gaps without the conversation dissolving into opinions and politics.
- **Direction:** A target state based on proven practices, not theoretical ideals.
- **Adaptability:** The ability to update and evolve as the organisation matures and the world changes.

Before we built ours, we studied what was already out there. Not to copy it, but to understand what works, what doesn't, and what's missing.

2.2 The Established Models

2.2.1 P3M3® — Portfolio, Programme, and Project Management Maturity Model

The most comprehensive of the traditional models, developed by Axelos. P3M3 assesses organisational maturity across three layers (portfolio, programme, project) and seven perspectives: Governance, Management Control, Benefits Management, Risk Management, Stakeholder Management, Finance Management, and Resource Management. Each perspective is scored across five maturity levels, from Awareness to Optimised.

What we learned from it: The seven-perspective structure is sound. It provides genuine coverage of the fundamentals. We adopted it as our core dimensional framework.

What we left behind: P3M3 can feel heavy — long interviews, complex scoring, detailed reports. More importantly, it stops at assessment. It tells you your maturity score but doesn't hand you the tools to improve. It's easy to turn into a paperwork exercise rather than a transformation tool.

2.2.2 OPM3® — Organisational Project Management Maturity Model

PMI's model focuses on aligning projects and programmes with organisational strategy. It covers standards, measurement, control, and continuous improvement.

What we learned from it: The emphasis on strategic alignment is valuable. The connection between organisational strategy and project execution is a thread we wove throughout HoLiDySt.

What we left behind: Less detail on benefits management and cross-enterprise governance. It also feels dated compared to more modern, agile-influenced approaches.

2.2.3 MSP — Managing Successful Programmes

Axelos' programme management methodology. Strong on governance, benefits management, and the relationship between programmes and organisational strategy.

What we learned from it: The benefits management approach — particularly the concept of a benefits dependency network — heavily influenced our programme playbook. MSP's governance model informed our multi-layered governance structure.

What we left behind: MSP is comprehensive but can be bureaucratically heavy. It also predates the agile revolution and doesn't naturally accommodate hybrid delivery.

2.2.4 PRINCE2 — Projects IN Controlled Environments

The most widely used project management methodology globally. Product-based planning, defined roles, stage gates, and exception management.

What we learned from it: Stage-gate governance, clear roles and responsibilities, and the principle of "manage by exception" are all embedded in HoLiDySt's project playbook.

What we left behind: PRINCE2 is a project methodology, not a programme or portfolio framework. It also assumes a waterfall delivery model, which limits its applicability in agile and hybrid contexts.

2.2.5 SAFe — Scaled Agile Framework

The dominant framework for scaling agile practices across large enterprises. SAFe provides structures for team, programme, large solution, and portfolio-level agile delivery.

What we learned from it: SAFe demonstrated that agile principles can work at enterprise scale — but they need a governance wrapper to do so. The concept of agile release trains, lean budgeting, and portfolio kanban all influenced our thinking.

What we left behind: SAFe can become its own bureaucracy — a paradox for an agile framework. It also focuses primarily on technology delivery and doesn't fully address the change management, stakeholder engagement, and benefits realisation challenges of multinational transformation.

Our position: HoLiDySt provides the governance and strategic layer; agile methods like SAFe provide the delivery engine at project level. We don't replace SAFe — we give it a home inside a governed portfolio.

2.2.6 Change Management Frameworks: Prosci ADKAR and Kotter

Prosci's ADKAR model (Awareness, Desire, Knowledge, Ability, Reinforcement) and Kotter's 8-Step Change Model are the most widely used approaches to organisational change management.

Our position: HoLiDySt's change management dimension is method-agnostic. We define what needs to happen (change impact assessment, stakeholder engagement, adoption tracking, champion networks) but don't prescribe which underlying model to use. Bring your preferred change approach — ADKAR, Kotter, or another — and plug it into the framework.

2.2.7 TOGAF — The Open Group Architecture Framework

An enterprise architecture framework used for designing, planning, implementing, and governing enterprise information technology.

What we learned from it: TOGAF's architectural thinking — layers, domains, reference models — influenced how we structured the maturity model. The idea that you assess and improve across multiple interconnected dimensions, not in isolation, comes partly from enterprise architecture thinking.

2.2.8 Other Models

- MoP (Management of Portfolios): Useful for portfolio selection and prioritisation, but not a full maturity model. Elements integrated into our portfolio playbook.
- PfM2: The EU's project portfolio management model. Narrower in scope but informative for public sector contexts.
- CMMI: Strong for software and process maturity, but doesn't fully cover portfolio/programme delivery.
- OKRs (Objectives and Key Results): A strategy-to-execution framework increasingly used alongside traditional KPIs. We integrate OKR thinking into our Vision-to-Value mapping approach.
- Design Thinking: Human-centred design principles that complement our emphasis on stakeholder engagement and user adoption.

2.3 Why We Didn't Just Copy

Organisations often spend months filling out maturity assessments, only to end up with:

- A colourful heat map.
- A 150-page consultant report.
- ...and no practical tools to actually improve delivery.

The gap in every established model is the same: they assess well but don't equip well. They tell you where you are but don't hand you the templates, governance models, workshop guides, and practitioner tools to get where you need to be.

We also found that traditional models consistently underweight the human factors — leadership, culture, adoption, resistance — that actually determine whether a transformation succeeds or fails. You can have perfect governance and still fail if your

sponsors aren't visible, your change champions aren't empowered, and your training programme is a compliance exercise rather than a capability builder.

2.4 Our Approach

We took what works from these models and left behind what doesn't:

Kept: Comprehensive coverage of portfolio, programme, and project maturity. Core dimensions like Governance, Benefits, Risk, Finance, and Resources. Stage-gate governance. Benefits dependency thinking. Structured assessment methodology.

Left behind: Long, bureaucratic assessment cycles. Generic reports with no tools for real improvement. Rigid assumptions about delivery methods. Frameworks that treat change management as an afterthought.

Added: Six modern transformation capabilities that traditional models miss entirely — Change Management & Adoption, Transformation Leadership, Agility & Adaptability, Technology Enablement, Data-Driven Benefits Analytics, and Learning & Knowledge Management. A template library that eliminates blank-page starts. A categorisation framework that right-sizes the methodology. Integration with agile and hybrid delivery. Practitioner guidance that tells you not just what to do, but what typically goes wrong and how to avoid it.

In short, we use maturity assessment as a stepping stone, not an end goal. It tells us where we are, so we can define where we want to be — and get there without drowning in paperwork.

2.5 The Baseline Imperative

It sounds obvious, but it needs saying because it's so often ignored:

If you want to improve something, you need to know where you're starting from.

You wouldn't start a fitness plan without knowing if you can jog a kilometre without collapsing. You wouldn't fix a leaky boat without first finding where the holes are.

Yet, in transformation management, organisations routinely jump straight to buying tools or launching massive PMOs without really understanding their current maturity. The result is predictable: solutions that don't fit the problem, investments that don't address the actual gaps, and improvement efforts that fix what isn't broken while ignoring what is.

That's why this framework starts with assessment — not as an academic exercise, but as a practical foundation:

- Measure where you are today.
- Understand what's already working well (so you don't fix what isn't broken).
- Pinpoint exactly where to improve, with targeted actions instead of throwing more process and paperwork at the problem.

Baseline □ Target □ Practical steps in between. It's not rocket science — just good practice.

CHAPTER 3

The HoLiDySt Architecture

The HoLiDySt Architecture

3.1 The Three Layers

HoLiDySt covers three interconnected layers of delivery management. Each operates at a different altitude, serves different stakeholders, and manages different types of decisions – but they form a single system.

3.1.1 Portfolio Management – Choosing the Right Investments

The portfolio layer sits at the top. It answers the strategic question: Are we investing in the right things?

Portfolio management is about selecting, balancing, and governing the organisation's portfolio of transformation investments. It ensures that resources and funding flow to the initiatives that deliver the most strategic value, and that the portfolio is actively managed – not just selected once and left to run.

Key responsibilities: strategic alignment, investment prioritisation, resource allocation, enterprise risk management, and strategic benefits tracking.

The audience: CPOs, CIOs, CFOs, strategy directors, enterprise PMO heads.

3.1.2 Programme Management – Delivering the Transformation

The programme layer sits in the middle. It answers the execution question: How do we deliver this complex transformation?

Programme management is about orchestrating multiple projects, workstreams, and change initiatives to deliver transformational outcomes. It's where strategy becomes reality – where the target operating model gets built, the solution gets deployed across countries, and the benefits get tracked and realised.

This is the most complex layer, because it requires simultaneous management of scope, governance, stakeholders, change, technology, finance, and risk across multiple geographies, cultures, and organisational structures.

Key responsibilities: programme lifecycle management, governance, benefits realisation, stakeholder engagement, change management, cross-workstream integration, and multi-country coordination.

The audience: programme directors, PMO leads, workstream leads, change managers, regional leads.

3.1.3 Project Management – Executing the Work

The project layer sits at the base. It answers the delivery question: How do we execute this specific piece of work effectively?

Project management is about delivering individual projects — technology builds, process redesigns, data migrations, training programmes — within the programme framework. Each project produces specific outputs that feed into programme outcomes.

Key responsibilities: project planning, delivery (waterfall, agile, or hybrid), team management, RAID management, quality control, and output handover.

The audience: project managers, team leads, delivery teams.

3.1.4 How They Connect

The layers aren't independent silos — they're a cascade:

- Downward: Portfolio decisions fund and prioritise programmes. Programme governance defines and oversees projects. Strategic objectives cascade from portfolio to programme to project.
- Upward: Project outputs feed programme outcomes. Programme outcomes deliver portfolio strategic benefits. Lessons learned flow upward and sideways to refine governance at every level.

A mature organisation has seamless governance across these three layers, avoiding duplicated work, conflicting priorities, and value leakage — the silent erosion of benefits that happens when nobody can trace a line from strategic intent to delivered output.

3.2 The Five-Volume Suite

HoLiDySt is packaged as five volumes, each with a clear purpose and audience:

Volume	Title	Purpose
1	The Framework (you are here)	The compass, diagnostic, and navigation layer. Establishes the intellectual foundation, provides the maturity assessment, and helps you choose which volumes you need and how much rigour to apply.
2	Portfolio Management Playbook	Guides enterprise leaders in managing the portfolio of transformation investments — what to fund, what to stop, how to balance, how to track strategic value.
3	Programme Management Playbook	The main delivery methodology. End-to-end guidance for planning, executing, and sustaining large, multinational transformation programmes.
4	Project Management Playbook	Guides project managers in delivering individual projects within a programme context, covering waterfall, agile, and hybrid delivery methods.

Volume	Title	Purpose
5	Template & Artifact Library	The complete toolkit. Every template, organised by volume and phase, with instructions and worked examples. Also the specification for digital tool deployment.

3.3 The Modularity Promise

Here's the commitment: every volume works alone, and all volumes work together.

This means you can adopt HoLiDySt incrementally, based on your role, your needs, and your ambition:

- You're a CPO managing an enterprise portfolio? Take Volume 1 (to assess maturity) and Volume 2 (Portfolio Playbook). You don't need the rest yet.
- You're a programme director brought in to deliver a multinational transformation? Volume 1 (to understand the approach) and Volume 3 (Programme Playbook). Maybe Volume 5 (Templates) for the tools.
- You're a project manager inside a programme? Volume 4 (Project Playbook) and Volume 5 (Templates) might be all you need.
- You're a head of PMO building enterprise-wide capability? Deploy the full suite — all five volumes — as an integrated methodology.
- You're recovering a programme that's gone sideways? Volume 1 (for a rapid health assessment) and the recovery chapter in Volume 3. Start there, expand as you stabilise.

No volume assumes you've read the others. But if you use the full set, the governance, language, benefits tracking, and maturity dimensions are all consistent — because they're all built on the same framework you're reading now.

Take the whole holiday, or just a long weekend. It scales to your ambition.

3.4 How the Volumes Integrate

When used together, the five volumes form a closed-loop system:

Strategic cascade (top-down): Portfolio strategy (Vol 2) □ defines which programmes to fund □ Programme methodology (Vol 3) □ defines which projects to execute □ Project delivery (Vol 4) □ produces outputs using templates (Vol 5) □ governed by the framework (Vol 1).

Value flow (bottom-up): Project outputs □ Programme outcomes □ Portfolio strategic benefits □ reported to the board □ informs next investment cycle.

Assessment loop: Volume 1's maturity assessment identifies gaps □ gaps point to specific chapters in Volumes 2, 3, or 4 □ those chapters reference templates in Volume 5 □ improvements are measured in the next assessment cycle.

Scalability loop: Volume 1's categorisation framework (Chapter 6) determines programme size □ size determines which templates in Volume 5 are mandatory versus optional □ governance intensity in Volumes 2–4 scales accordingly.

CHAPTER 4

The 13-Dimension Maturity Model

CHAPTER 4

The 13-Dimension Maturity Model

4.1 Purpose

The maturity model answers two questions that every organisation should ask but often avoids:

"How good are we, really, at delivering change?"

And:

"How can we get better without making things worse?"

The model isn't designed for vanity scoring — nobody gets a trophy for reaching Level 4. It's designed for practical improvement: identify where you're strong, where you're weak, and where the targeted interventions will deliver the most value.

It covers all three layers (Portfolio, Programme, Project) across thirteen dimensions, scored at five maturity levels. Assess one layer or all three. The model scales to your needs.

4.2 The Seven Core Dimensions

These are the foundational capabilities that every organisation needs to deliver change effectively. They're based on P3M3's seven perspectives — proven, widely understood, and still relevant.

4.2.1 Dimension 1: Organisational Governance

What it means: Clear decision-making structures, defined authority, and strategic alignment across all initiatives.

Why it matters: Without governance, every decision is a negotiation and every escalation is a crisis. With it, the right people make the right decisions at the right level, and programmes don't stall waiting for approval from someone who didn't know they were supposed to approve anything.

What good looks like: Formal governance boards with defined authority. RACI matrices that people actually refer to. Stage gates that are genuine decision points, not rubber-stamping ceremonies. Escalation paths that work. Consistent governance across regions and business units — adapted locally, but structurally coherent.

4.2.2 Dimension 2: Management Control

What it means: The ability to plan, monitor, and control delivery activities with transparency and proactive management.

Why it matters: A plan nobody tracks is just a wish. Management control is the nervous system of programme delivery — it tells you where you are, whether you're on track, and where problems are developing before they become crises.

What good looks like: Integrated schedules showing dependencies. KPIs tracked and reported regularly. A change control process that actually controls change rather than documenting it after the fact. Data quality good enough to make decisions with. Predictive techniques that spot problems before they arrive.

4.2.3 Dimension 3: Benefits Management

What it means: The systematic identification, planning, tracking, and realisation of benefits linked to strategic objectives.

Why it matters: Programmes exist to deliver benefits. If you can't trace a line from what you're delivering to the value it creates, you're doing activity, not transformation. Benefits management is the discipline that keeps everyone honest about why they're doing what they're doing.

What good looks like: Benefits identified early and linked to strategy. Benefit owners assigned and accountable — not the PMO, not the finance team, but the business leaders who will realise the value. Both financial and non-financial benefits captured. Benefits tracked during delivery and validated post-implementation. Dependency mapping that shows how project outputs connect to programme outcomes connect to strategic value.

4.2.4 Dimension 4: Risk Management

What it means: Systematic identification, assessment, and mitigation of risks and issues at all levels.

Why it matters: Large transformations are inherently uncertain. Risk management doesn't eliminate uncertainty — it ensures you're not surprised by things you should have seen coming, and that you have a plan when things go wrong. Because things will go wrong.

What good looks like: Risks identified proactively, not reactively. Consistent scoring (probability, impact, proximity). Mitigation plans with owners and deadlines. Risk registers that are living documents, not archives. Escalation mechanisms that work — issues reach the right decision-maker before they become emergencies. Early warning indicators that enable prevention, not just response.

4.2.5 Dimension 5: Stakeholder Management

What it means: Proactive, structured engagement with all stakeholders to build trust, alignment, and support.

Why it matters: Stakeholder resistance is the most common cause of transformation failure — more than technology problems, budget overruns, or scope creep. The best solution in the world fails if the people who need to adopt it don't understand it, don't trust it, or weren't consulted.

What good looks like: Stakeholders identified and mapped (influence, interest, support level). Engagement strategies tailored by stakeholder group. Communication that's two-way — not just broadcast, but genuine feedback loops. Sponsors and leaders visibly engaged. Stakeholder satisfaction measured and acted upon. In multinational programmes: local and global stakeholder needs balanced and aligned.

4.2.6 Dimension 6: Finance Management

What it means: Effective financial planning, budgeting, monitoring, and control to maximise value delivery.

Why it matters: Transformation programmes consume significant investment. Finance management ensures that money goes where it creates the most value, that costs are tracked against budgets, and that financial decisions are governed rather than improvised.

What good looks like: Budgets developed systematically and aligned with scope. Funds allocated based on strategic value, not historical patterns or political influence. Costs tracked at regular intervals with variances explained. Forecasts updated frequently. Financial governance with defined approval thresholds. Benefits compared to costs to assess real return on investment. Contingency reserves managed, not hoarded.

4.2.7 Dimension 7: Resource Management

What it means: Effective planning, allocation, and development of people, skills, and assets across all initiatives.

Why it matters: The most common constraint in transformation programmes isn't budget — it's people. The right skills, in the right place, at the right time. Resource management is the discipline of making that happen without burning out your best people or leaving critical roles unfilled.

What good looks like: Resources planned early with skills and capacity needs anticipated. Allocation based on priorities, avoiding conflicts and bottlenecks. A skills inventory that's current and usable. Cross-portfolio visibility so resource decisions aren't made in silos. Effective onboarding and mobilisation. Vendor and contractor resources managed alongside internal teams. Retention and development strategies for key talent.

4.3 The Six Extended Transformation Dimensions

These six dimensions are HoLiDySt's enhancement of traditional maturity models. They address the capabilities that, in our experience, most often determine whether a transformation succeeds or fails — and that established frameworks consistently underweight or ignore entirely.

They were added in the Second Edition after field experience made it clear that an organisation can score well on all seven core dimensions and still fail, because it lacks the leadership, change capability, agility, or learning culture to execute.

4.3.1 Dimension 8: Change Management & Adoption

What it means: The structured preparation, support, and enablement of stakeholders to adopt change and sustain new ways of working.

Why it matters: Technical delivery without adoption is expensive shelf-ware. The most perfectly designed process, the most elegantly configured system, the most meticulously planned deployment — all worthless if the people who need to use them don't, won't, or can't. Change management is the discipline that bridges the gap between "we've built it" and "they're using it."

What good looks like: A defined change management strategy applied to every initiative. Change impacts assessed and planned for. Change champion networks established and active. Training that builds capability, not just awareness. Resistance identified early and addressed — not suppressed. Adoption measured with real metrics, not training attendance sheets. Sustainability actions taken post-implementation to embed new ways of working.

4.3.2 Dimension 9: Transformation Leadership

What it means: Active, visible executive sponsorship and leadership that provides vision, direction, and support for transformation.

Why it matters: The single biggest predictor of transformation success isn't methodology, technology, or budget — it's sponsorship. Active, visible, engaged leadership that champions the change, removes barriers, makes decisions, and shows up when things get difficult. Everything else is secondary.

What good looks like: Executive sponsors assigned with clear accountability. Leaders who articulate a compelling vision and communicate it consistently. Decision-making that's timely and removes barriers rather than creating them. Cross-functional collaboration promoted from the top. Leaders who model the desired behaviours. Governance boards where leaders actively participate, not send delegates.

4.3.3 Dimension 10: Agility & Adaptability

What it means: The ability to respond to change, handle uncertainty, and deliver value through flexible, iterative approaches.

Why it matters: No transformation plan survives contact with reality unchanged. The organisations that succeed aren't the ones with the most detailed plans — they're the ones that can adapt when the plan meets the real world. Agility isn't just about Scrum teams; it's about an organisation's capacity to pivot at every level.

What good looks like: Teams familiar with agile principles and adaptable ways of working. Agile or hybrid delivery methods used where appropriate. Plans updated dynamically to reflect changing conditions. Decision-making fast enough to support pivots without compromising governance. Iterative delivery that accelerates value realisation. Stakeholder feedback loops that actually change what gets delivered. A culture that treats learning from failure as an asset, not a liability.

4.3.4 Dimension 11: Technology Enablement

What it means: The effective use of technology to support planning, collaboration, decision-making, and performance monitoring across all delivery levels.

Why it matters: In an era of integrated PPM platforms, AI-driven analytics, and real-time dashboards, managing a multinational programme on spreadsheets and email isn't just inefficient — it's a competitive disadvantage. Technology enablement is the dimension that turns data into decisions and manual processes into automated workflows.

What good looks like: Modern PPM tools deployed and consistently used. Collaboration platforms that enable distributed teamwork. Real-time dashboards for governance boards. Workflow automation for approvals, escalations, and document management. Data integrated across projects, programmes, and portfolios. AI-driven insights for risk prediction and schedule optimisation. Users trained and supported — technology adopted, not just installed.

4.3.5 Dimension 12: Data-Driven Benefits Analytics

What it means: The use of data and analytics to measure, track, and optimise the realisation of benefits across all levels.

Why it matters: Benefits management (Dimension 3) tells you what to track. Benefits analytics tells you how to track it, how to spot problems before they materialise, and how to optimise value delivery in real time. It's the difference between a benefits register that gets updated quarterly and a benefits dashboard that tells you today whether you're on track.

What good looks like: Relevant data sources available and integrated. Benefits data accurate, consistent, and timely. Real-time dashboards with alerts for deviations. Predictive analytics that forecast benefits risks. Data used to adjust delivery plans and maximise realised value. Roles and responsibilities defined for data quality. Lessons from benefits data analysis used to improve future measurement.

4.3.6 Dimension 13: Learning & Knowledge Management

What it means: The systematic capture, sharing, and reuse of knowledge and lessons learned to continuously improve delivery capability.

Why it matters: Every transformation generates enormous amounts of learning — what works, what doesn't, what we'd do differently next time. Most organisations capture approximately none of it in any usable form. Knowledge management is the discipline that turns individual experience into organisational capability.

What good looks like: A structured process for capturing lessons learned — during delivery, not just at the end. A centralised, searchable knowledge repository. Teams that actually access and use knowledge from other initiatives. Communities of practice where delivery professionals exchange insights. Templates and processes standardised and reused. Training programmes that build on accumulated experience. Knowledge management integrated into performance reviews and improvement plans.

4.4 The Maturity Matrix

Each of the 13 dimensions applies across all three layers — Portfolio, Programme, and Project — but manifests differently at each level:

Dimension	Portfolio	Programme	Project
1. Governance	Strategic prioritisation boards	Programme steering & governance	Project board
2. Management Control	Portfolio dashboards	PMO controls	Project planning tools
3. Benefits Management	Strategic benefits map	Dependency networks, tracking	Output tracking
4. Risk Management	Enterprise risk	Programme risk framework	RAID logs
5. Stakeholder Management	Executive engagement	Multi-country stakeholder plan	Local stakeholder plan
6. Finance Management	Budget optimisation	Programme funding	Project budgets
7. Resource Management	Enterprise resource pool	Shared resourcing	Team assignment
8. Change Management	Org-wide change governance	Adoption planning & change network	Local change support
9. Leadership	Executive sponsorship culture	Programme sponsor & leaders	Project sponsor & leads
10. Agility	Portfolio-level agility	Agile programme management	Agile/Hybrid delivery
11. Technology	PPM tools enterprise-wide	Programme dashboards, PMO tools	Task tracking, automation
12. Benefits Analytics	Enterprise KPI analytics	Programme benefit dashboards	Output metrics
13. Learning & KM	Portfolio lessons repository	Programme knowledge sharing	Project retrospectives

4.5 The Five Maturity Levels

Each dimension is scored on a five-level scale. Here's what each level actually means — not the textbook definition, but what it feels like in practice:

Level 1 — Awareness: You know this is a thing. Maybe someone's read a book about it. But there's no consistent practice — everything is ad-hoc, dependent on individual initiative, and invisible to governance. If the one person who cares about this goes on holiday, it

stops happening.

Level 2 — Repeatable: Some process exists. Certain teams do it well. But it's inconsistent — what works in one programme or region doesn't transfer to others. You can point to examples of good practice, but you can't point to a standard that everyone follows.

Level 3 — Defined: There's a documented standard, and it's applied across the organisation. People know what's expected. Templates exist and are used. This is the level where the methodology becomes real rather than aspirational. Most organisations underestimate how much work it takes to get here.

Level 4 — Managed: Not just defined but measured. You have data on how well the practice is working. You track performance, identify trends, and adjust proactively. Governance uses evidence, not opinions. This is where the transition from "we follow a process" to "we manage outcomes" happens.

Level 5 — Optimised: Continuous improvement is embedded. The practice isn't just managed — it's actively refined based on experience, feedback, and evolving best practice. The organisation learns, adapts, and gets better over time. Very few organisations reach Level 5 in all dimensions, and that's fine. The goal isn't perfection — it's purposeful improvement.

4.6 How the Dimensions Connect

The 13 dimensions aren't independent dials you tune separately. They interact, reinforce, and sometimes constrain each other:

- Governance enables everything. Without clear decision-making structures, every other dimension struggles. It's the foundation the rest is built on.
- Benefits management needs finance management. You can't track value delivery without financial discipline. And finance management without benefits management is just cost control — necessary but incomplete.
- Change management needs leadership. The best change strategy in the world fails without visible, active sponsorship. These two dimensions rise and fall together.
- Agility needs governance. This surprises people. But agility without governance isn't agile — it's chaos. The trick is governance that enables speed rather than preventing it.
- Technology enablement amplifies everything. Good tools make governance more transparent, risk management more proactive, benefits tracking more real-time, and stakeholder engagement more inclusive. But technology without the underlying practices is just expensive infrastructure.
- Learning & knowledge management is the long game. It doesn't produce immediate results, but over time it's the dimension that determines whether an organisation keeps improving or keeps repeating the same mistakes.

Understanding these connections matters because improvement efforts that target one dimension in isolation often fail. Investing in technology (Dimension 11) without improving the practices it supports (Dimensions 1–10) is the most common and most expensive version of this mistake.

CHAPTER 5

Assessing Where You Stand

Assessing Where You Stand

5.1 The Assessment Philosophy

Our assessment approach is built on three principles:

Light and fast, not a second full-time job. A full assessment should take 2–3 weeks, not months. Use workshops and focused interviews, not exhaustive documentation reviews. The goal is a directionally accurate picture, not a forensic audit.

Actionable, not academic. The output isn't a report — it's a heat map linked to specific tools and improvements. Every score connects to a chapter in the playbooks and templates in Volume 5. You should finish the assessment knowing exactly what to do next.

Honest, not diplomatic. The biggest risk in any maturity assessment is politeness. Stakeholders score themselves generously, assessors avoid confrontation, and the resulting heat map shows a comforting sea of amber that tells you nothing. The assessment works only if people are willing to say "we're bad at this" out loud.

5.2 The Assessment Process

5.2.1 Step 1: Choose Scope

Decide whether to assess Portfolio, Programme, Project, or a combination. Most organisations start with one layer — typically whichever is causing the most pain — and expand later.

5.2.2 Step 2: Conduct Assessment

For each dimension in scope, work through the assessment questions using workshops and interviews. Include people who do the work, not just people who manage it. A programme director's view of risk management and a country PM's view are often very different — you need both.

5.2.3 Step 3: Score Each Dimension

Rate each dimension from 1 (Awareness) to 5 (Optimised) using the scoring guide. Each dimension has ten questions; the dimension score is the average.

5.2.4 Step 4: Generate Heat Map

Plot scores on the maturity matrix (dimensions × layers). The heat map should make strengths and gaps immediately visible — green where you're strong, red where you're

not, amber where you're adequate but have room to improve.

5.2.5 Step 5: Identify Quick Wins

Each dimension includes score-specific recommendations — immediate, low-effort improvements that deliver visible results. Start here to build momentum and credibility before tackling the harder structural changes.

5.2.6 Step 6: Define Target State

Compare your current scores to where you need to be. "Where you need to be" isn't always Level 5 — it's the level that supports your strategic ambitions without over-engineering. A small organisation running focused projects might target Level 3 across most dimensions and be perfectly well served.

5.2.7 Step 7: Create Roadmap

Plan improvements in three horizons:

- 90-day plan: Quick wins and immediate actions.
- Mid-term (6–12 months): Structural improvements, capability building, governance changes.
- Long-term (12–24 months): Maturity growth, culture change, continuous improvement embedding.

5.3 Scoring Guide

For each question, score using this guide:

Score	Level	What it means in practice
1	Awareness	It happens sometimes, by accident, when someone cares enough. There's no process, no consistency, no visibility.
2	Repeatable	Some people do it well, some don't. There might be a template somewhere, but finding it is an adventure. It works in one region or team but doesn't transfer.
3	Defined	There's a documented standard. People know about it and mostly follow it. Templates exist and are used. This is the baseline for "we have a methodology."
4	Managed	It's measured. You have data on how well it's working. Governance uses evidence. Problems get spotted before they become crises.
5	Optimised	It gets better over time. Lessons learned actually lead to improvements. The practice adapts to changing needs. People take pride in how well it works.

The honesty test: When scoring, ask "would a new joiner, arriving tomorrow, be able to see this in action within their first week?" If the answer is no, you're probably a level higher than reality.

5.4 The Assessment Questionnaire

The full 13-dimension assessment follows. Each dimension includes ten questions, a scoring guide, evidence examples, and score-specific quick wins.

[Note: The full 130-question assessment questionnaire from the existing Assessment Appendix goes here — Dimensions 1 through 13, each with their 10 questions, scoring guide, evidence examples, and quick wins by score level. This is the single, definitive version — not repeated elsewhere in the suite.]

[Content to be migrated from existing Assessment Appendix — all 13 dimensions with their complete question sets, scoring guides, evidence examples, and quick wins. The existing content is well-structured and comprehensive; it needs only minor editing for tone consistency and removal of any duplicate material.]

5.5 Reading the Heat Map

Once you have scores across dimensions and layers, patterns emerge:

Vertical patterns (same dimension, all layers): If Governance scores 2 across Portfolio, Programme, and Project, that's a systemic issue — the organisation doesn't have a governance culture. Fixing it at one layer won't hold unless you fix it everywhere.

Horizontal patterns (one layer, all dimensions): If Programme Management scores well across most dimensions but poorly on Change Management and Leadership, you have a technically competent PMO that's likely to deliver solutions nobody adopts.

Diagonal gaps: If Portfolio Governance is strong (Level 4) but Programme Governance is weak (Level 2) and Project Governance is non-existent (Level 1), you have a cascade failure — strategic decisions are being made well but never reaching the teams doing the work.

The "two-level rule": If any two connected dimensions differ by more than two levels, you have a structural problem. Level 4 Risk Management with Level 1 Leadership means risks are being identified beautifully and then ignored because nobody with authority is paying attention.

5.6 From Assessment to Action

The heat map isn't the output — the action plan is. Here's how to translate scores into improvements:

Your Score	Action	Where to Look
1 (Awareness)	Introduce the basics. Use HoLiDySt templates to create foundational practices.	Volume 5 templates for the relevant dimension. Start with the simplest ones.
2 (Repeatable)	Standardise. Take what works in pockets and make it consistent.	Relevant playbook chapter (Vol 2, 3, or 4) for the methodology. Volume 5 for templates.
3 (Defined)	Measure. Start tracking how well the practice is working. Introduce data and dashboards.	Playbook chapters on reporting and tools. Technology Enablement guidance.
4 (Managed)	Optimise. Use data to refine. Introduce predictive techniques. Share best practices.	Learning & Knowledge Management dimension. Continuous improvement guidance.
5 (Optimised)	Sustain and share. You're a reference point. Help other parts of the organisation learn from you.	Cross-organisational knowledge sharing. Communities of practice.

CHAPTER 6

Right-Sizing the Methodology

Right-Sizing the Methodology

6.1 Why One Size Never Fits All

A global ERP migration across 40 countries and a department automation pilot in one office are both "transformation programmes." But treating them the same way — same governance, same templates, same stage gates, same reporting cadence — is a recipe for either crushing the small initiative under unnecessary bureaucracy or leaving the large one dangerously under-governed.

HoLiDySt is designed to scale. This chapter tells you how.

6.2 The Programme Classification Model

We classify initiatives using three dimensions:

6.2.1 Size (Primary Driver)

Category	Countries / Regions	Budget (€/\$)	Stakeholders Impacted	Typical Examples
VL (Very Large)	20+ (Global)	> 100M	> 5,000	Global SAP S/4HANA migration, global banking platform
L (Large)	10–20	50M–100M	1,000–5,000	Multi-region ERP, CRM deployment
M (Medium)	3–10	20M–50M	300–1,000	Regional finance transformation
S (Small)	1–3	5M–20M	100–300	Country-specific ERP or HR/payroll project
XS (Extra Small)	Single country or department	< 5M	< 100	Departmental automation, pilot digital project

6.2.2 Transformation Type (Modifier)

Indicates the primary nature of change, which activates domain-specific templates and guidance:

- Process-led: Operating model redesign, standardisation — emphasises Change Management templates.

- Technology-led: New system implementation (ERP, CRM, Data Platform) — emphasises Technical Build templates.
- Organisational Change-led: M&A; integrations, restructuring — emphasises Governance & Stakeholder templates.
- Digital Innovation-led: AI, automation, analytics, capability building — emphasises Agile, Innovation templates.

6.2.3 Complexity (Secondary Driver)

Level	Description
High	Multiple legacy systems, complex integrations, high localisation, strong regulatory impact
Medium	Moderate integrations, partial localisation, some regulatory considerations
Low	Standalone system, minimal integrations, standard processes

6.3 Scoring Approach

To categorise your programme:

Size Score: XS = 0, S = 1, M = 2, L = 3, VL = 4

Complexity Score: Low = 0, Medium = 1, High = 2

Total Programme Score = Size Score + Complexity Score

Score	Category
0–1	XS
2–3	S
4–5	M
6	L
7+	VL

This provides flexibility when size and complexity diverge. A single-country programme with high regulatory complexity and multiple legacy system integrations could score as M rather than S — which means more governance, not less.

The Type modifier then activates additional templates relevant to the transformation nature, without changing the base category.

6.4 Template Selection Rules

Three rules determine what's mandatory and what's optional:

1. Size = Primary: Determines the base set of mandatory templates.
2. Complexity = Secondary: Upgrades some optional templates to mandatory if complexity is high.
3. Type = Modifier: Activates additional domain-specific templates.

6.4.1 What this means in practice:

- VL, Technology-led, High Complexity: 95% of templates mandatory. Full RAID framework, all gate reports, complete governance suite. You need everything because everything can go wrong.
- M, Process-led, Medium Complexity: Many design and change templates mandatory; fewer deep technical artefacts required.
- XS, Digital Innovation-led, Low Complexity: Lean template set. Vision, Charter, minimal governance. Enough structure to stay on track without drowning in process.

A department pilot doesn't need monthly Steering Committee meetings – but it still needs a sponsor who shows up.

6.5 Template Selection Matrix

The complete mandatory/optional grid for all templates by programme size:

6.5.1 Phase 0 – Initiation

Template	VL	L	M	S	XS
Vision Statement	M	M	M	M	M
Programme Charter	M	M	M	M	M
Preliminary Business Case	M	M	M	M	O
Stakeholder Analysis Matrix	M	M	M	M	O
Initial RAID Log	M	M	M	M	O
Programme Organisation Chart	M	M	M	M	O
Governance Framework / SteerCo ToR	M	M	M	O	O
High-Level Benefits Map	M	M	M	O	O
Mobilisation Plan	M	M	M	O	O
Initiation Gate Report	M	M	M	O	O

6.5.2 Phase 1 – Discovery & Design

Template	VL	L	M	S	XS
Country Current State Report	M	M	M	O	O
Heat Map	M	M	M	O	O
Global Process Map	M	M	M	O	O
Technology Landscape Diagram	M	M	M	O	O
Future State Blueprint & TOM	M	M	M	O	O
Gap Analysis	M	M	M	M	O
Opportunity Prioritisation Matrix	M	M	M	O	O
Benefits Realisation Plan	M	M	M	O	O
KPI Framework	M	M	M	O	O
Benefits Dependency Map	M	M	M	O	O
Transformation Roadmap	M	M	M	M	O
Change Impact Assessment	M	M	M	O	O
Readiness Assessment Heat Map	M	M	M	O	O
Design Gate Report	M	M	M	O	O

6.5.3 Phase 2 — Build & Pilot

Template	VL	L	M	S	XS
Solution Build Documentation	M	M	M	O	O
Data Migration Plan	M	M	M	O	O
Solution Architecture Diagram	M	M	O	O	O
Localisation Requirement Matrix	M	M	O	O	O
Test Plan	M	M	M	M	O
Test Execution Report	M	M	M	O	O
QA Sign-off Checklist	M	M	M	O	O
Pilot Country Selection Matrix	M	M	O	O	O
Pilot Plan	M	M	M	O	O
Pilot KPI Tracking	M	M	M	O	O
Pilot Execution Report	M	M	M	O	O
Lessons Learned Register	M	M	M	M	O
Updated Deployment Strategy	M	M	M	O	O

Template	VL	L	M	S	XS
Training Toolkit	M	M	M	O	O
Pilot Gate Report	M	M	M	O	O

6.5.4 Phase 3 — Rollout & Deployment

Template	VL	L	M	S	XS
Country Deployment Plan	M	M	M	O	O
Country Readiness Assessment	M	M	M	O	O
Wave Deployment Calendar	M	M	O	O	O
Post-Wave Review Report	M	M	O	O	O
Training Schedule	M	M	M	M	O
Communication Pack	M	M	M	M	O
Change Champion Network Report	M	M	O	O	O
Adoption Tracking Report	M	M	M	O	O
Go-Live Readiness Checklist	M	M	M	M	O
Cutover Plan	M	M	M	O	O
Contingency Plan	M	M	M	O	O
Hypercare Support Plan	M	M	M	O	O
Benefits Tracking Report	M	M	M	O	O
Executive Dashboard	M	M	M	O	O
Deployment Gate Report	M	M	M	O	O

6.5.5 Phase 4 — Embed & Optimise

Template	VL	L	M	S	XS
Stabilisation Report	M	M	M	O	O
Benefits Realisation Dashboard	M	M	M	O	O
Continuous Improvement Register	M	M	M	O	O
Knowledge Transfer Plan	M	M	M	O	O
Lessons Learned Register	M	M	M	M	M
Programme Closure Report	M	M	M	M	M
Closure Gate Report	M	M	M	O	O

6.5.6 Cross-Phase / Governance

Template	VL	L	M	S	XS
Stage Gate Readiness Checklist	M	M	M	O	O
Master RACI Matrix	M	M	M	M	O
RAID Management Framework	M	M	M	O	O
Communication Plan	M	M	M	M	O
Decision Log	M	M	M	M	O
PMO Dashboard	M	M	M	O	O
Governance Meeting Pack	M	M	M	M	O

M = Mandatory | O = Optional

Type and complexity modifiers then add or remove templates from the base. For example, a Technology-led programme automatically includes Solution Architecture and Data Migration templates as mandatory, regardless of size.

6.6 How to Use This

1. Score your programme (Size + Complexity = Category, note Type).
2. Use the Template Selection Matrix to identify your mandatory template set.
3. Apply complexity adjustments (upgrade optional templates to mandatory if you scored High complexity).
4. Apply type modifiers (activate domain-specific templates).
5. Review with PMO for final approval before programme initiation.

6.7 Scaling Governance, Not Just Templates

Right-sizing isn't only about templates – it's about governance intensity:

Element	VL / L	M	S / XS
Steering Committee	Monthly, full membership	Bi-monthly or quarterly	Quarterly or sponsor-only reviews
Programme Board	Bi-weekly	Monthly	As needed
Stage Gates	All 5 gates, formal review	Gates 0, 2, 4 (combined where appropriate)	Gate 0 and Gate 4 minimum
Reporting	Weekly PMO dashboard	Bi-weekly status reports	Monthly summary

Element	VL / L	M	S / XS
RAID Reviews	Weekly	Bi-weekly	As needed
Benefits Reviews	Monthly	Quarterly	Post-closure only

The principle is consistent: enough governance to maintain control and transparency, not so much that it becomes the transformation's biggest overhead.

CHAPTER 7

The Road Ahead

The Road Ahead

7.1 A Living Framework

HoLiDySt is not finished. By design, it never will be.

Best practices evolve. New tools emerge. Organisations mature. The regulatory landscape shifts. A framework that doesn't evolve with these changes becomes the kind of static methodology that HoLiDySt was built to replace.

This Fourth Edition will, in time, give way to a Fifth. The assessment model may gain new dimensions (sustainability is a strong candidate for Dimension 14). The template library will grow. The playbooks will be refined as more organisations use them and feed back what works and what doesn't.

The edition system is real and forward-looking. When the methodology changes significantly — new dimensions, restructured playbooks, integration of new capabilities — it will be published as a new edition, with a clear record of what changed and why.

7.2 The Digital Future

Volume 5 (Template & Artifact Library) is designed to serve two purposes: as a practical paper-based toolkit today, and as a specification for digital deployment tomorrow.

The future of delivery methodology isn't documents — it's platforms. The template selection matrix becomes a configuration engine that surfaces the right templates based on your programme profile. The assessment questionnaire becomes a digital diagnostic that generates heat maps automatically. The governance rhythms become workflow automations. The RACI matrices become role-based access controls.

The metadata architecture embedded in the suite — volume references, phase tags, programme size tags, dimension tags, audience tags — is specifically designed to support this transition.

7.3 AI and the Future of Programme Delivery

AI is already changing how programmes are managed. Predictive analytics can identify risks before they materialise. Intelligent scheduling can optimise resource allocation. Automated reporting can eliminate hours of manual dashboard production. Natural language processing can analyse stakeholder sentiment from communication data.

HoLiDySt's Technology Enablement dimension (Dimension 11) was updated in this edition to reflect these capabilities. But AI brings governance challenges as well as opportunities:

- Algorithmic decision-making requires transparency and explainability. When AI recommends killing a programme based on risk scores, the governance model must ensure human oversight of that decision.
- The EU AI Act creates regulatory requirements around high-risk AI systems that may apply to AI-driven portfolio or programme decisions.
- Data quality and bias matter more when algorithms are making recommendations. Garbage in, confident garbage out — but now with a veneer of mathematical authority.
- Ethical considerations apply when AI is used to assess workforce impacts, predict adoption resistance, or optimise resource allocation in ways that affect people's careers.

The principle is simple: AI should augment decision-making, not replace governance. The human remains accountable.

7.4 Sustainability and ESG Integration

Large transformations have environmental and social impacts that increasingly require explicit governance:

- Technology choices (cloud hosting, data centre locations) have carbon footprints.
- Supply chain redesign affects communities and labour markets.
- Workforce transformation — role changes, automation, restructuring — has social consequences.
- Regulatory requirements around ESG reporting are tightening globally.

Future editions of HoLiDySt may introduce sustainability as a formal dimension. In the meantime, the guidance is practical: include environmental and social impact in your benefits framework, consider ESG factors in vendor selection, and ensure your programme governance can answer the question "what is the social and environmental cost of this transformation?" — because your board will increasingly ask it.

7.5 Where to Go Next

You now have the framework: the philosophy, the maturity model, the assessment methodology, and the right-sizing approach. Here's where to go from here:

If you need to...	Go to...
Manage an enterprise portfolio of investments	Volume 2 — Portfolio Management Playbook
Deliver a transformation programme	Volume 3 — Programme Management Playbook
Execute a project within a programme	Volume 4 — Project Management Playbook
Find a specific template or artifact	Volume 5 — Template & Artifact Library

If you need to...	Go to...
Assess your current maturity	Chapter 5 of this volume, then the relevant playbook
Right-size the methodology for your initiative	Chapter 6 of this volume
Recover a programme in trouble	Volume 3, Chapter 15 – Programme Recovery

Whatever your starting point, the system is designed to meet you where you are – and take you where you need to go.

APPENDIX A — Glossary of Terms

Term	Definition
Artifact	A working document or tool that supports programme execution. Not the same as a deliverable — artifacts are operational; deliverables are approved outputs.
BAU	Business As Usual — the steady-state operations that a programme hands over to after closure.
Benefits Dependency Network	A diagram showing how programme initiatives, through enablers and business changes, deliver measurable benefits linked to strategic objectives.
Benefits Realisation	The measurement and confirmation that planned benefits have actually been achieved. Not the same as "we delivered the project on time."
CPO	Chief Portfolio Officer — the executive responsible for managing the organisation's portfolio of transformation investments.
Change Champion	A nominated individual within a country or team who supports adoption, gathers feedback, and bridges the gap between the programme and the people affected by it.
Continuous Improvement	The ongoing optimisation of processes, tools, and practices after programme closure — ensuring the organisation doesn't drift back to old ways.
Deliverable	A final, approved output of a phase or milestone. Distinguished from artifacts by formal sign-off.
Gate	See Stage Gate.
Hallucination	In HoLiDySt usage: our aspirational vision — what we dream of achieving. Not a clinical term.
Heat Map	A colour-coded visual representation of maturity scores, readiness levels, or performance across dimensions, countries, or capabilities.
HoLiDySt	Holistic Delivery System — this framework. A holiday from bureaucracy.
Hypercare	An intensive post-go-live support period providing rapid issue resolution and stabilisation.
KPI	Key Performance Indicator — a measurable value that demonstrates how effectively objectives are being achieved.
PfMO	Portfolio Management Office — the enterprise-level function responsible for portfolio reporting, demand management, capacity planning, and cross-programme governance. Distinguished from programme-level PMOs.

Term	Definition
PID	Project Initiation Document – the document that defines a project's scope, objectives, deliverables, resources, risks, and governance within a programme context.
PMO	Programme Management Office – the team responsible for day-to-day programme coordination, planning, reporting, and governance support.
Portfolio Board	The senior governance body responsible for authorising programmes, allocating investment, and governing the transformation portfolio.
RACI	Responsible, Accountable, Consulted, Informed – a matrix clarifying roles and decision rights for each deliverable or activity.
RAID	Risks, Assumptions, Issues, Dependencies – the four categories tracked in the programme's operational risk register.
Stage Gate	A formal checkpoint between programme phases where governance bodies review readiness and approve (or reject) progression.
Steering Committee	The senior governance body providing strategic direction, resolving escalations, and approving major decisions.
Target Operating Model (TOM)	The defined future-state design of how an organisation will operate – processes, systems, structures, governance, capabilities.
Transformation	A fundamental change to how an organisation operates, as distinct from incremental improvement. Programmes in this framework are transformational by nature.

APPENDIX B — Methodological Cross-Reference

This table shows how HoLiDySt concepts and dimensions map to established frameworks and methodologies:

HoLiDySt Element	P3M3	MSP	PRINCE2	SAFe	TOGAF	Prosci ADKAR	Kotter
Dim 1: Governance	Organisational Governance	Programme Governance	Organisation Theme	Lean-Agile Leadership	Architecture Governance	—	Step 7: Sustaining
Dim 2: Management Control	Management Control	Planning & Control	Plans, Progress Themes	Agile Release Train	—	—	—
Dim 3: Benefits Mgmt	Benefits Management	Benefits Realisation	Business Case Theme	Lean Portfolio Mgmt	—	Reinforcement	Step 8: Anchoring
Dim 4: Risk Mgmt	Risk Management	Risk & Issue Mgmt	Risk Theme	Built-in Quality	Risk Management	—	—
Dim 5: Stakeholder Mgmt	Stakeholder Engagement	Stakeholder Engagement	Organisation Theme	Customer Centricity	Stakeholder Mgmt	Awareness, Desire	Steps 1-4
Dim 6: Finance Mgmt	Finance Management	—	Business Case Theme	Lean Budgets	—	—	—
Dim 7: Resource Mgmt	Resource Management	Resource Management	—	Agile Teams	—	Ability	—
Dim 8: Change Mgmt	—	—	—	—	—	Full ADKAR model	8-Step model
Dim 9: Leadership	—	Senior Responsible Owner	Executive Theme	Lean-Agile Leadership	—	Sponsorship	Steps 1-3
Dim 10: Agility	—	—	—	Core SAFe principles	—	—	—

HoLiDySt Element	P3M3	MSP	PRINCE2	SAFe	TOGAF	Prosci ADKAR	Kotter
Dim 11: Technology	—	—	—	DevOps, CI/CD	Technology Architecture	—	—
Dim 12: Benefits Analytics	—	—	—	Measure & Grow	—	—	—
Dim 13: Learning & KM	—	—	Lessons Learned	Inspect & Adapt	—	—	—

Note: "—" indicates the framework does not explicitly address this dimension, which is part of why HoLiDySt exists.