PMA Consultants

Est. 1971

STATEMENT OF QUALIFICATIONS

Business Transformation









OUR LEADERSHIP

PRACTICE LEADERS



FRANCISCO CRUZ

PE, PMP, RMP, SP, VDC, VMA

CHIEF TRANSFORMATION OFFICER

Years of Experience: 18 | PMA: 16

Francisco has demonstrated himself as a knowledge steward, earning his PE license and PMP, RMP, SP, VDC, and VMA certifications. He is highly skilled at partnering with clients to advise on using data analytics and process assessment tools, addressing their performance challenges, and creating pathways for future transformation. Francisco has impressive experience in qualitative and quantitative benchmarking, and best practices review, improvement, and implementation. He was part of the internal team that launched and implemented the risk management practice within the Port Authority of New York & New Jersey (PANYNJ). He also helped write and implement the project risk management section of PANYNJ's Project Management Manual of Standards and Procedures. His project experience includes water/wastewater, transportation, pharmaceutical, mixed-use, corporate office buildings, and municipal projects. He has performed cost and schedule risk analyses on over 40 infrastructure and pharmaceutical projects, including tunnels, airports, bridges, roads, and ports totaling more than $1.9 billion.



DANIEL POSADA

NATIONAL PRACTICE LEAD

Years of Experience: 7 | PMA: 3

Mr. Daniel Posada is an engagement manager with experience leading high performing teams in operational transformation projects. Currently, he is leading a team of 3 consultants in building PMO capabilities for a $100M+ yearly capital projects portfolio, implementing controls, increasing visibility, and establishing governance while driving industry best practices. Other responsibilities include leading monthly and quarterly forecasting and variance reporting. He has championed 1-, 3- and 5-year investment planning cycles, implemented business intelligence dashboard and KPIs to increase reporting visibility for project managers through the Head of Operations, FP&A team, and CFO, and is highly skilled in short- and long-term capital planning, forecasting and cashflow management, as well as program management and project controls. Mr. Posada has experience leading projects from transformational design, into bottoms up planning, all the way through solution implementation and continuous improvement practices. He's a client relationship manager focused on talent development and coaching with the aim to exceed engagement deliverables as well as a lead in a pilot program to increase the skill level of PowerBI in regional office through a training and coaching program. Currently, his focus is on biotech and pharma within healthcare and previous experience in consumer products manufacturing.



INDUSTRY DEMANDS

BUSINESS TRANSFORMATION

Business transformation is crucial for all companies and industries, enabling them to adapt to the evolving landscape and capitalize on innovation and digital advancements. During uncertain times, such transformations can stabilize operations, identify and address financial distress, and pave the way for long-term sustainability. PMA, a project management consulting firm, understands the bottlenecks, inefficiencies, and redundancies that can hinder business operations, leading to cost savings and productivity gains. PMA goes beyond mere systems and software, offering customized solutions that provide the most value and help businesses rethink their approaches to transformation.

PMA's experience in delivering business transformation services across diverse industries and business domains has equipped them with the expertise to tackle various scenarios and understand unique challenges. Our proven track record in successful transformation projects has significantly improved our clients' efficiency, productivity, and profitability. PMA is dedicated to providing high-quality services tailored to meet each client's specific needs, ensuring their success becomes PMA's success. By partnering with PMA, your business can harness the power of data as a differentiator, automating manual reporting processes, and leveraging predictive analytics to drive informed decision-making and achieve transformative results.

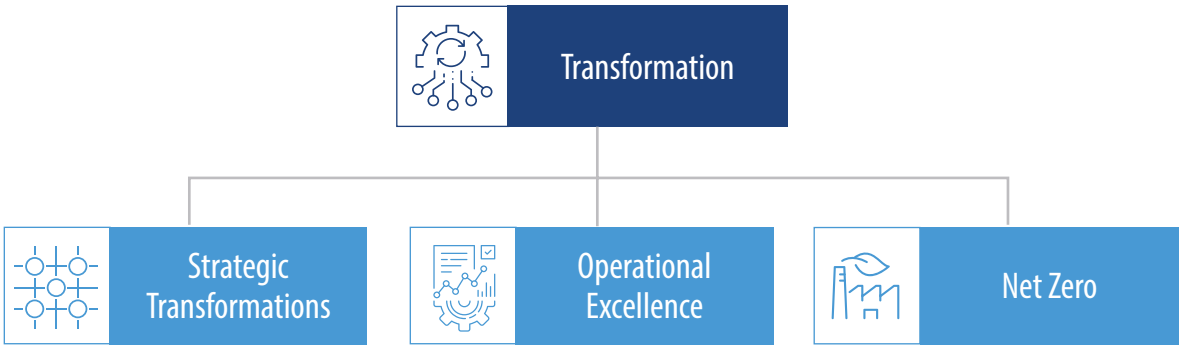


BUSINESS TRANSFORMATION SERVICES

For over 50 years, we have focused on supporting our clients in program delivery and project management solutions. Over time, our services have expanded beyond capital projects to encompass various verticals within organizations. PMA is committed to empowering businesses unleash their maximum potential by leveraging our extensive expertise in enhancing client performance.

We provide comprehensive support to finance teams, enabling them to optimize internal processes and enhance operational efficiencies. Additionally, we specialize in designing and implementing digital solutions that streamline decision-making processes and improve overall productivity. Moreover, we actively lead initiatives aimed at reducing carbon emissions, demonstrating our commitment to sustainability.

PMA's Transformation group focuses on three key types of engagements: ***Strategic Transformations, Operational Excellence and Net Zero.***



STRATEGIC TRANSFORMATIONS

Strategic Transformation engagements encompass Digital transformation (DT) and Change Management (CM) efforts. Digital Transformation refers to engagements where technology solutions are primarily utilized to solve specific business problems. Unlike Project Management Information System (PMIS), these engagements have a broader scope and are independent of program and project management. Examples of DT projects include implementing enterprise resource planning (ERP) systems, enhancing reporting tools, and developing custom solutions. Change Management projects, on the other hand, focus on driving cultural shifts within organizations. These projects are crucial for managing organizational change, ensuring that the implemented changes and improvements are effective and do not lead to unintended consequences.

OPERATIONAL EXCELLENCE

Operational Excellence encompasses Best Practices, Performance Improvement, and Benchmarking efforts. Performance Improvement projects enhance business metrics by identifying and focusing on specific indicators. Our approach involves creating a comprehensive plan and implementing targeted strategies to drive measurable improvements. By analyzing the existing performance data, we can identify areas of opportunity and develop tailored solutions to optimize operations. Best practices involve setting clear goals, creating a well-defined project plan, and employing experienced project managers. We perform regular monitoring and evaluation, effective communication, and robust risk management to ensure your organization learns from past projects to help you improve future endeavors. Benchmarking services are also a crucial part of our Operational Excellence offerings. We assist clients in evaluating their performance relative to their industry or specific functional areas. This process serves as a baseline for setting improvement targets and provides valuable insights into industry best practices. Our data-driven research enables us to support improvement initiatives effectively, helping clients gain a competitive edge and achieve sustainable growth.

NET ZERO

The primary objective of our Net Zero service is to assist clients in achieving their zero emissions goals. We begin by gaining a thorough understanding of their current emissions profile and identifying the sources of emissions. This comprehensive assessment serves as the foundation for developing a tailored roadmap that outlines the steps and strategies needed to reach their sustainability targets.

In addition to emissions reduction strategies, we recognize the importance of program branding and effective communication. As part of our service, we develop and launch program branding initiatives that align with the client's goals and values. We also create communication plans that effectively convey the client's commitment to achieving net-zero emissions. By integrating these branding and communication elements, we help clients raise awareness, engage stakeholders, and inspire collective action.

At PMA, we appreciate the distinctive challenges and opportunities that businesses encounter. However, we also acknowledge that these situations often revolve around similar themes. By working closely with our clients, we combine their profound understanding of their business with our extensive expertise in performance improvement and industry knowledge. This collaborative approach empowers us to generate tangible results that positively impact the bottom line. Furthermore, we integrate essential capabilities, systems, and tools directly within your company, empowering your employees to consistently identify, prioritize, and achieve sustainable outcomes. Below, you will find our approach to each of the work streams within the Transformation group.

APPROACH

STRATEGIC TRANSFORMATIONS

Digital Transformations

Our team recognizes the paramount importance of digital transformation in fostering organizational growth and maintaining competitiveness amidst today's rapidly evolving business landscape. We partner with our clients, navigating them through the complexities of digital transformation. We aim to empower them to harness the potential of innovative technologies, elevate customer experiences, and attain digital maturity.



Define: Vision and Strategy

The initial phase of our digital transformation approach entails the development of a well-defined vision and strategy that aligns with the organization's objectives and aspirations. We foster close collaboration with our clients, aiming to comprehend their specific challenges and opportunities. We gain valuable insights by thoroughly assessing their current digital capabilities and market dynamics. Through this process, we aid in the formulation of a captivating digital vision and the creation of a robust strategy. This strategy outlines the necessary steps and investments essential for attaining successful digital transformation.



Clear
goals and high-level move-forward plan

Quantifiable
outcomes and potential impact

Secure
commitment, investment and core purpose

Develop: Digital Roadmap and Execution

Expanding on the strategic foundation, we collaborate with our clients to establish a comprehensive digital roadmap. This roadmap serves as a blueprint, identifying specific digital initiatives and prioritizing them based on their value and feasibility. It outlines the required resources, timelines, and dependencies for each initiative. We guide technology selection, architecture design, and integration approaches, ensuring the successful implementation of the digital initiatives. We employ agile methodologies throughout the process to foster iterative development, rapid value realization, and adaptability to changing market dynamics.



Launch: Change Management and Adoption

DT encompasses more than just the implementation of new technologies; it also entails driving cultural and organizational change. We fully acknowledge the critical role that change management plays in the success of digital transformation initiatives. Our consultants work closely with stakeholders at every level to cultivate a digital mindset, raise awareness, and facilitate the adoption of digital initiatives. We develop comprehensive change management plans that incorporate communication strategies, training programs, and ongoing support.



Case Study

PMA successfully executed a focused Digital Transformation engagement for a pharmaceutical industry client's Capital Projects operations. The client managed a $500M investment plan using a cumbersome cloud-based Excel sheet, resulting in version control issues, baseline maintenance challenges, and inaccurate reporting. PMA implemented a transformative solution to address these challenges that prioritized cultural change and improved data practices. The implemented solution involved Introducing an upgraded structure and centralizing functions, enabling monthly reporting, and leveraging business intelligence capabilities. As a result, the client experienced error-free reporting, improved stakeholder visibility, established a robust governance structure with spending controls, and enhanced decision-making capabilities.

Change Management

PMA follows industry best-practice methodologies on change management, such as Prosci's Change Management approach and lean for process improvement. PMA's certified Prosci-Change Management and Association of Change Management Professionals also hold project management, value management, Lean, and Agile certifications. PMA's go-to methodologies allow all team members to be familiar with them, enabling us to deliver high-quality change management services based on industry best practices.

PMA excels in documenting processes, needs, and opportunities in clear and understandable ways, while actively listening to our clients to ensure comprehensive understanding. Drawing from our experience working with executives, we recognize the importance of concise and actionable communication, including reports and presentations. We pride ourselves on addressing changes and issues transparently as they arise, resolving them appropriately, respectfully, and efficiently. We firmly believe that transparent communication is one of the most crucial factors in achieving project goals. We establish communication plans in every engagement and provide reports to maintain organizational transparency, involving appropriate stakeholders. We offer coaching to our clients and provide drafts of communication messages and talking points for sponsors as needed. We leverage templates (e.g., communication plans, change management plans, and training plans) and incorporate lessons learned into our practices. We also offer multiple templates for mapping current and future states in various formats, documenting procedures and job aids, and training curriculum and classes that can be delivered in-person and remotely.



Genuine success in process improvement and change management extends beyond short -term achievements. We aim to equip our clients with the necessary skills and knowledge to sustain progress over the long term. To this end, knowledge transfer is a fundamental principle that guides our work. We work closely with our clients to ensure that their staff members are trained and empowered to continue driving process improvement and change management long after our engagement. To accomplish this, we actively involve a partner from the client side in our engagements, enabling them to learn from our expertise and develop new skill sets. Our ultimate objective is to build lasting capability within our clients' organizations, allowing them to continually improve their processes and effectively manage change over time.

V.I.E.I.V METHODOLOGY

PMA has developed its own methodology, known as V.I.E.I.V: Vision, Involve, Empower, Implement, Validate. PMA has successfully implemented this methodology over several engagements and adapted it to serve the situation best. The V.I.E.I.V. methodology incorporates principles and practices from Prosci's ADKAR change management approach, and it enables organizations to manage change more effectively by following these process steps:

Vision

Establish a clear and compelling vision for the need for change and the change initiative, which outlines the desired future state of the organization. By crafting a powerful vision and sharing it with all stakeholders, you can generate enthusiasm, foster a sense of purpose, and increase the likelihood of successful outcomes.

Involve

Involve all stakeholders in the change process, from the early stages of planning to the final implementation phase. This includes employees, customers, suppliers, and other external parties the change may impact. Solicit their feedback, input, and ideas to ensure the change is well-informed and widely supported.

Empower

Empower employees and other stakeholders to take ownership of the change initiative. This involves providing them with the necessary knowledge, tools, training, and resources to make the change successful. We encourage them to develop their skills and competencies and to take an active role in driving the change forward.

Implement

Implement the change in a structured and systematic manner. Develop a detailed plan outlining the steps required to achieve the desired future state and ensure that all stakeholders know their roles and responsibilities. Monitor progress closely and adjust as needed to ensure the change stays on track.

Validate

Validate the change initiative's success through ongoing evaluation and measurement. Use key performance indicators (KPIs) and other metrics to track progress and assess the impact of the change on the organization. Use this information to make additional adjustments and improvements as needed, and to ensure that the change is sustainable in the long term.



The V.I.E.I.V. methodology is designed to ensure that change initiatives are well-planned, widely supported, and effectively implemented. We have used this approach in many public and private sector organizations, including projects with unique challenges and conditions. By following this methodology, organizations can achieve their desired future state and position themselves for long-term success.



TRAINING

PMA understands the importance of ensuring that all training initiatives are consistently effective across all business units. To achieve this goal, PMA recommends following the ADDIE methodology: Analyze, Design, Develop, Implement, and Evaluate. This comprehensive framework provides a structured approach to develop and implement training programs that align with your organization's goals and objectives. PMA's first step will be to analyze the current state of training within your organization, identifying any gaps or areas for improvement. Based on this analysis, PMA will design a training program that addresses the identified needs and aligns with your business strategy.

Next, PMA will develop the training materials and implement the program across all relevant business units. During this phase, it's imperative to prioritize the equitable delivery of training to all participants, regardless of their location or department. Finally, using the Kirkpatrick model, PMA will evaluate the training program's effectiveness, gathering participant feedback and measuring the impact on business performance. By following this process, PMA can ensure that all training initiatives maintain consistent effectiveness and contribute to your organization's overall success.

Project Management	Initiate	Planning	Executing	Monitoring & Controlling	Closing & Operate
Change Management (Prosci)	Preparing for Change	Managing Change			Reinforcement
Change Management (VIEIV)	**Vision** • *Align the change strategy* • *Build change mgmt. team* • *Workshop and Audit* • *Develop change mgmt. coalition*	**Involve** • *Sponsor roadmap* • *Develop & implement change mgmt. plan* • *Risk management* • *Develop mgmt. plan*	**Empower** • *Training plan* • *Coaching plan* • *Resistance plan* • *Implementation of different initiatives*	**Implement** • *Gather feedback* • *Understand resistance and diagnose gaps* • *Weekly and monthly reports* • *Risk assessments*	**Validate** • *Implement preventive and corrective actions* • *Celebrate successes*

OPERATIONAL EXCELLENCE

Best Practices and Performance Improvement

We are excited to help organizations achieve and sustain performance excellence. Our approach to performance improvement focuses on identifying areas of opportunity, implementing effective strategies, and fostering a culture of continuous improvement. Through our proven methodologies and expertise, we have successfully guided numerous organizations in maximizing their operational efficiency and achieving their performance goals.

PMA's experience in performance improvement projects spans from improving cash flow forecasting accuracy and reducing corporate finance process times to cost savings, initiative delivery time reduction, and more.

Assessment and Analysis

We begin our performance improvement engagements with a comprehensive assessment and analysis of the organization's current state. Our experienced consultants work closely with key stakeholders to understand the organization's objectives, challenges, and opportunities. We employ various analytical tools and techniques to gather relevant data, identify performance gaps, and uncover underlying root causes. This stage serves as the foundation for developing a tailored performance improvement plan.

Strategy Development

Based on the findings from the assessment stage, we collaborate with our clients to develop a clear and actionable performance improvement strategy. This strategy encompasses a set of specific goals, objectives, and performance indicators that align with the organization's overall mission and vision. We leverage our industry knowledge and best practices to design strategies that address the identified gaps and provide a roadmap for success. Throughout this stage, we engage stakeholders to ensure their buy-in and commitment to the proposed strategies.

Implementation and Execution

Once the performance improvement strategy is defined, we work closely with our clients to implement and execute the identified initiatives. We provide guidance and support during this critical stage, assisting in project planning, resource allocation, and change management. We help organizations establish clear accountability structures, streamline processes, and leverage technology solutions where applicable. Through effective project management and communication, we ensure the smooth execution of the performance improvement initiatives.

Monitoring and Continuous Improvement

Sustainable performance improvement requires a continuous monitoring and improvement process. We work with clients to establish performance monitoring systems to track progress, measure key performance indicators, and identify emerging issues. We can identify areas for further optimization and refinement through regular review sessions and data-driven analysis. Our consultants provide guidance and recommendations for making necessary adjustments and sustaining long-term performance gains.

CS: Florida DOT D4 (Process Improvement)	Evaluated FDOT D4's Consultant Invoice Transmittal System (CITS) Process	
	Details	
	Current CITS	The current CITS workflow took ~ 184 business hours to be completed
	Value Engineering Study	PMA Performed a *value engineering* study to improve the overall process • Uncovered several inefficient steps and software glitches • Evaluated 12 functional areas and departments • Identified 40+ ideas to improve the CITS process • Made 13 recommendations to FDOT D4
	New CITS	The new CITS process will only take ~65 business hours • Representing ~65% of total time savings (approx. 119 business hours saved)

Benchmarking

Our track record in this area showcases our understanding of the intricacies involved in maximizing the value and efficiency of capital investments.

- We stay current with industry best practices, emerging trends, and regulatory requirements, ensuring our benchmarking processes are tailored to your industry context.
- We employ comprehensive data collection, analysis, and interpretation to provide accurate and actionable insights and identify performance gaps.
- We adhere to strict data integrity standards and maintain the utmost confidentiality in handling your project-related information.
- We bring a diverse team of engineers, project managers, financial analysts, and industry specialists to provide a holistic assessment of your capital projects, considering technical, financial, and strategic aspects to deliver comprehensive benchmarking insights.





Our Experience

Project Cost Benchmarking

We have conducted benchmarking exercises to assess project costs and determine cost drivers in capital projects. By comparing cost metrics against industry standards and similar projects, we help you identify opportunities for cost optimization, accurate budgeting, and effective resource allocation.

Schedule Performance Benchmarking

Our team has a proven track record in benchmarking project schedules, analyzing critical milestones, and evaluating project duration and timeline performance. Through comparative analysis, we enable you to identify areas of schedule improvement, streamline project timelines, and enhance overall project efficiency.

Quality and Risk Benchmarking

We assess project quality and risk factors by benchmarking against industry standards and best practices. This helps you proactively identify potential risks, implement robust quality control measures, and ensure that your capital projects meet or exceed industry benchmarks.

Best Practice Identification

Through benchmarking exercises, we identify best practices from leading projects and organizations such as AACE International, Project Management Institute, and the International Organization for Standardization. By studying successful case studies, we help you adopt proven strategies and implement industry-leading practices, enhancing the overall performance and success of your capital projects.

NET ZERO

We assist our clients develop and implement robust strategies to surpass their greenhouse gas emissions objectives and achieve Net Zero status. Our comprehensive approach involves partnering with leading sustainability experts, understanding the client's existing conditions, and modeling emissions to establish a baseline for a detailed reduction roadmap. We consider various reduction methods, conduct emissions inventories, and forecast future emissions.

Definition

During the Definition phase, our primary focus is thoroughly understanding our client's aspirations and commitments toward achieving Net Zero. We work closely with stakeholders to comprehend their reasons for pursuing Net Zero, assess where this initiative falls within their business priorities, and align the project objectives accordingly. Additionally, we collect and analyze the client's current emissions data to establish a baseline and comprehensively understand their carbon footprint.

Planning

In the Planning phase, we leverage the insights gathered during the Definition phase to develop a detailed Net Zero Plan and roadmap. This plan encompasses a range of key components, including technical, branding, and research workstreams. We collaborate with clients to identify initiative owners, establish effective change management practices, define milestone deliverables, and set up recurring check-ins to monitor progress. We also develop accountability and incentive plans to foster engagement and alignment with the Net Zero goals. Throughout the planning process, we utilize GHG calculators and other relevant tools to accurately measure emissions and track progress.

Implementation

Once the Net Zero Plan is finalized, we support our clients in executing the plan and driving successful implementation. This phase involves communicating the detailed Net Zero plan and approach to the organization and external stakeholders, ensuring alignment and commitment. We establish effective recurrent check-ins to review progress, evaluate pre-selected mitigation plans, and take corrective actions as needed. Additionally, we provide ongoing support to leadership to drive effective implementation of strategies and fostering a culture of sustainability.

By following this phased approach, PMA empowers organizations to achieve Net Zero objectives, reduce their environmental impact, and become leaders in sustainability.





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