

Building the Perfect **P**roject **M**anagement **O**ffice

*"I claim not to have controlled events, but
confess plainly that events have controlled me."*

Abraham Lincoln, 1809-1865

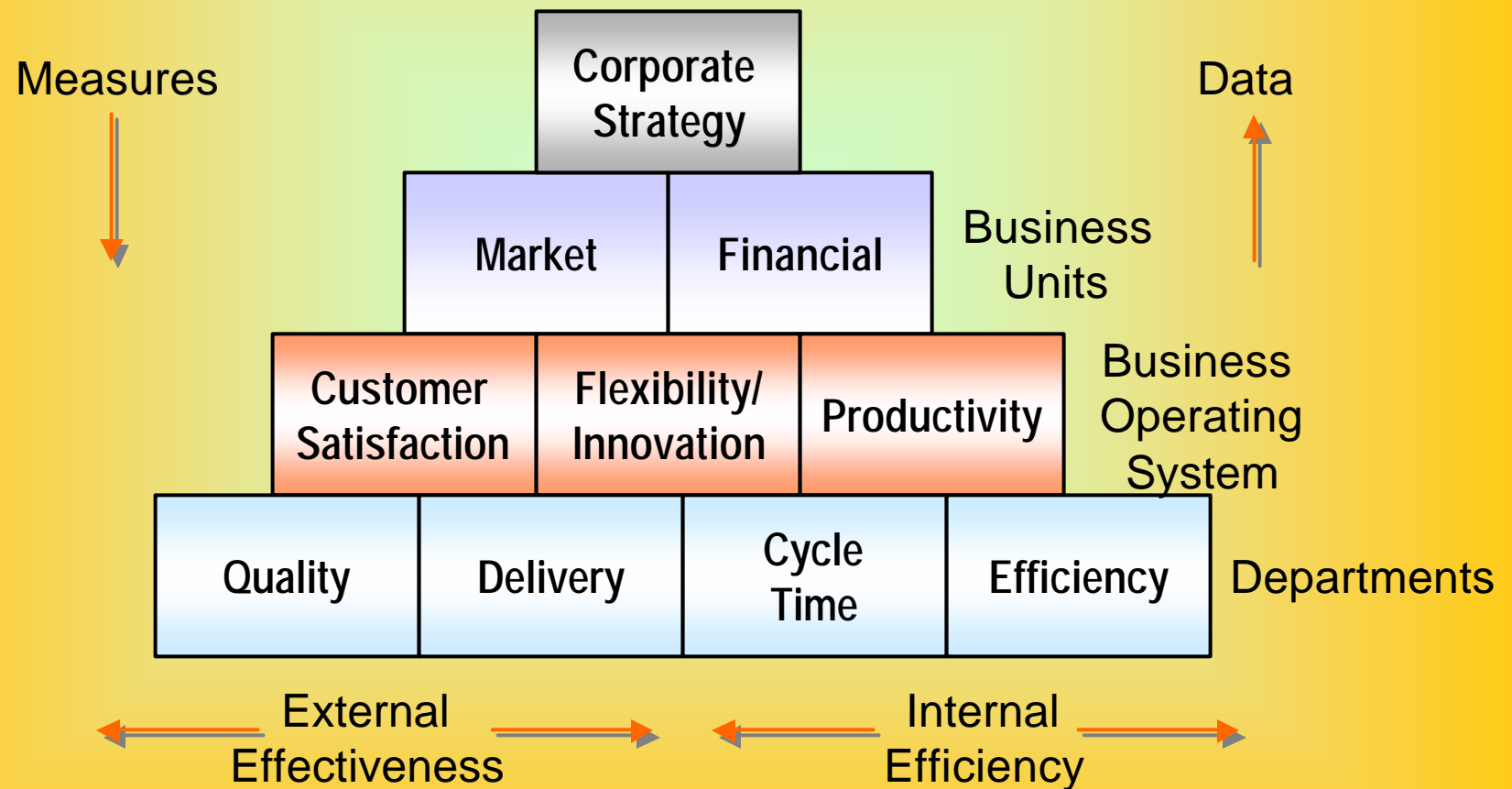
What We'll Cover....

- ✍ Organizational Context
- ✍ Definitions
- ✍ Key Tasks
- ✍ Decision Making and Process Flow
- ✍ Phases - Example
- ✍ Membership and Roles
- ✍ PMO Meetings
- ✍ Keeping it Visible

GIGA: Top CIO Concerns for 2002-3

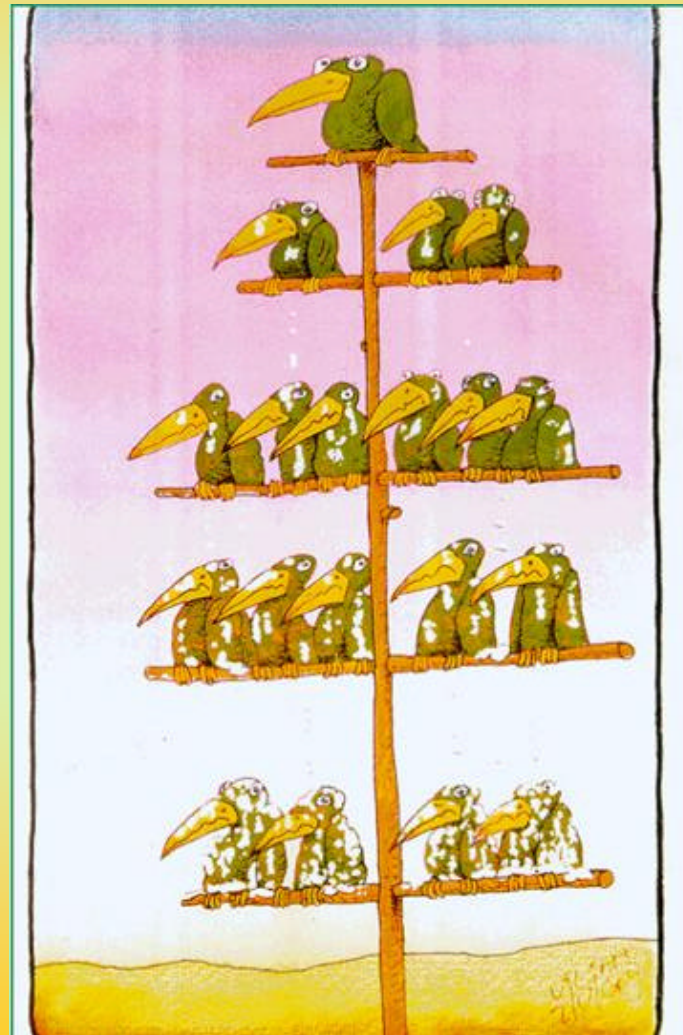
- ✍ CUTTING AND STABILIZING COSTS
- ✍ ALIGNING IT WITH THE BUSINESS
- ✍ Building Strong Service Direction
- ✍ Selective Outsourcing and Balancing of External Service Providers
- ✍ MANAGEMENT OF EXTERNAL AND INTERNAL RESOURCES
- ✍ Security/Disaster Recovery
- ✍ ENTERPRISE ARCHITECTURE
- ✍ Systems Integration
- ✍ BUILDING CREDITABILITY FOR IT SERVICES
- ✍ PRIORITIZING IT INVESTMENT AND FORMAL PLANNING

A Model For Identifying Measures at Various Organizational Levels*

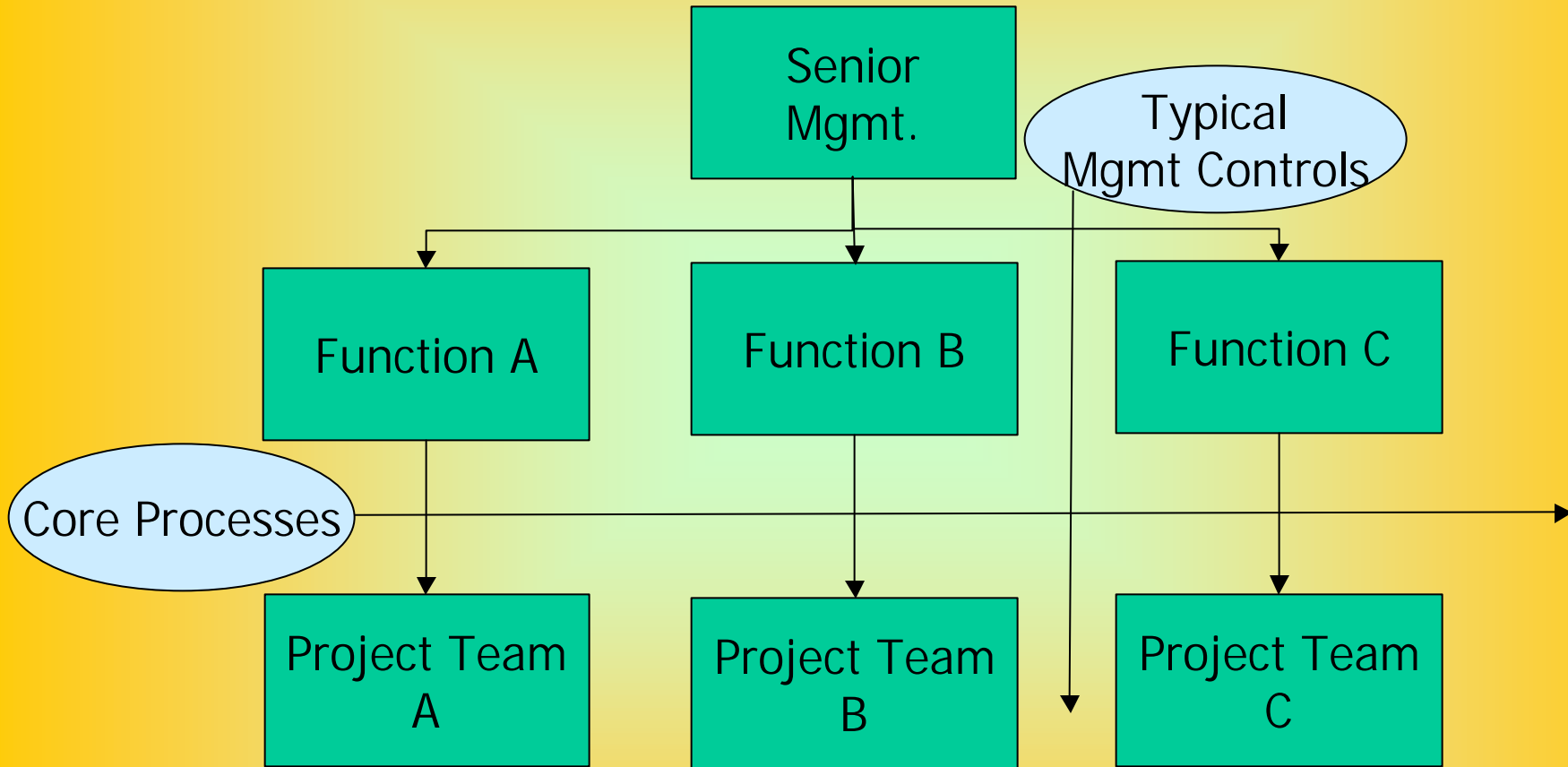


*From Making Performance Management Systems Team Friendly - GartnerGroup / Gomolski & Cross

How Most Businesses Are Organized



Organizational Implications of Core Process Development



What is Process?

✍️ “..simply a structured, measured set of activities designed to produce a specified output for a particular customer or market. It implies a strong emphasis on *how* work is done within an enterprise, in contrast to a product focus emphasis on *what*...’

Process Innovation by Thomas Davenport, 1993

What is a PMO?

✎ Its focus is to effectively manage/monitors multiple projects for multiple clients

- Effectively keeps projects on track
- Is proactive regarding failing projects
- *Know when to hold them and know when to fold them –*

The Gambler by Kenny Rogers

✎ Increases the overall level of PM expertise

✎ Facilitates the use of common process and tools

✎ Establishes greater process discipline

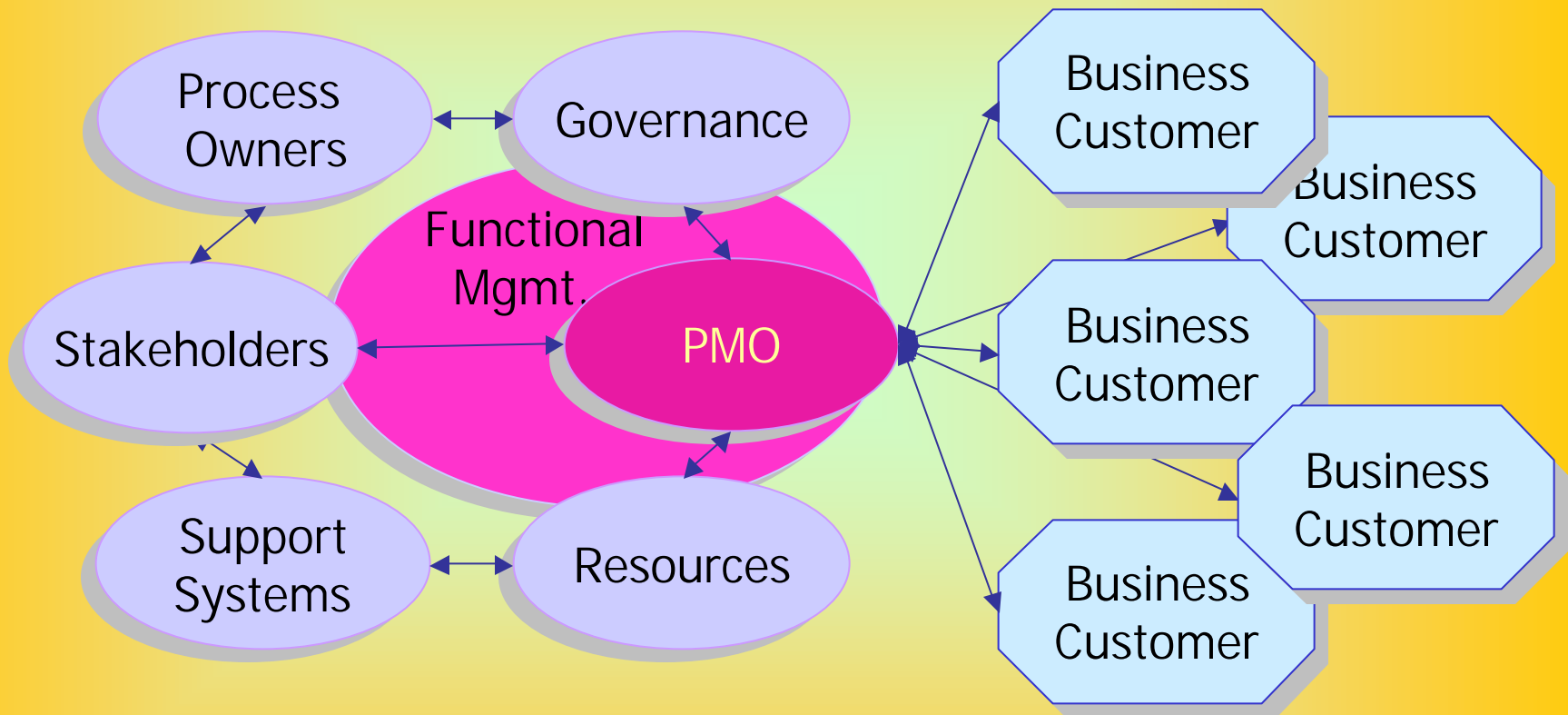
✎ Depending on authority level can accept and reject work

✎ Measures and reports effectiveness

✎ Improve decision making around project selection

✎ Interacts and liaisons with Governance and/or clients

The Social Context of a PMO



PMO Initial Tasks

- ✍ Determine membership and sponsorship
- ✍ Align the PMO with the strategic needs of the business.
 - ✍ Establish Governance, charter, mission and membership
- ✍ Engage management, constituents/stakeholders and the PMO team in creation of PMO goals and metrics
- ✍ Establish an engagement process that focuses working on the right stuff – *strategic fit*
- ✍ Plan to keep work visible to clients, constituents and employees at all times
- ✍ Negotiate authority and control to meet the needs of the business
- ✍ A communications plan is a must!

PMO Ongoing Tasks

- ✍ Assess and reassess relationship to client base and governance
- ✍ Adjust membership and refine roles
- ✍ Communicate results on an ongoing basis
- ✍ Manage human resources
- ✍ Continuously improve PM processes
- ✍ Utilize technology and tools but don't fall in love with them
- ✍ Develop operational norms and capture learning

Process and Project Methodology

✍ The Phases:

✍ Qualify

✍ **Decide**

✍ Quantify

✍ **Decide**

✍ Build

✍ **Monitor**

✍ Test

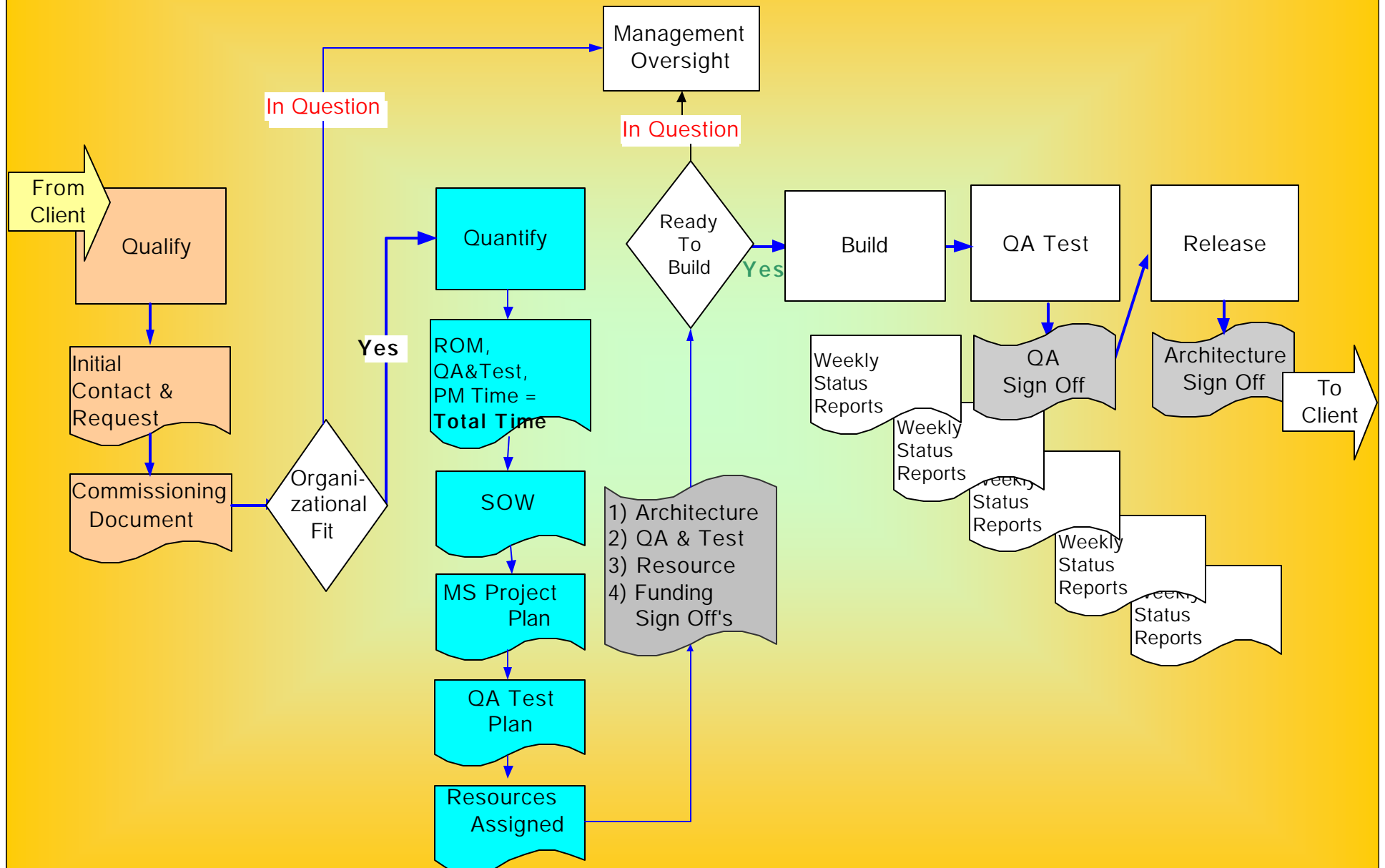
✍ **Evaluate**

✍ Release

✍ **Assess**

✍ **Close Out**

Sample PMO Decision and Process Flow



The Qualify Phase

- ✍ Establish a predictable process of client engagement
- ✍ Provide a consistent form of response to customer's requests
- ✍ Consistent level of response on a universal basis
- ✍ Focus on the customer needs
 - First step in a comprehensive process and methodology that allows the organization to develop quality solutions and keep ahead of the competition.
 - Benefit: Consistency will improve decision making around projects that the PMO undertakes

The Quantify Phase

- ✍ Define/document customer requirements
- ✍ Perform gap analysis
 - ✍ Assess client current/future state
- ✍ Confirm captured requirements with client and obtain sign-off
 - ✍ Project start date confirmed
- ✍ Understand and quantify the resources available to manage and implement the project
- ✍ Understand and document the risks associated with the project

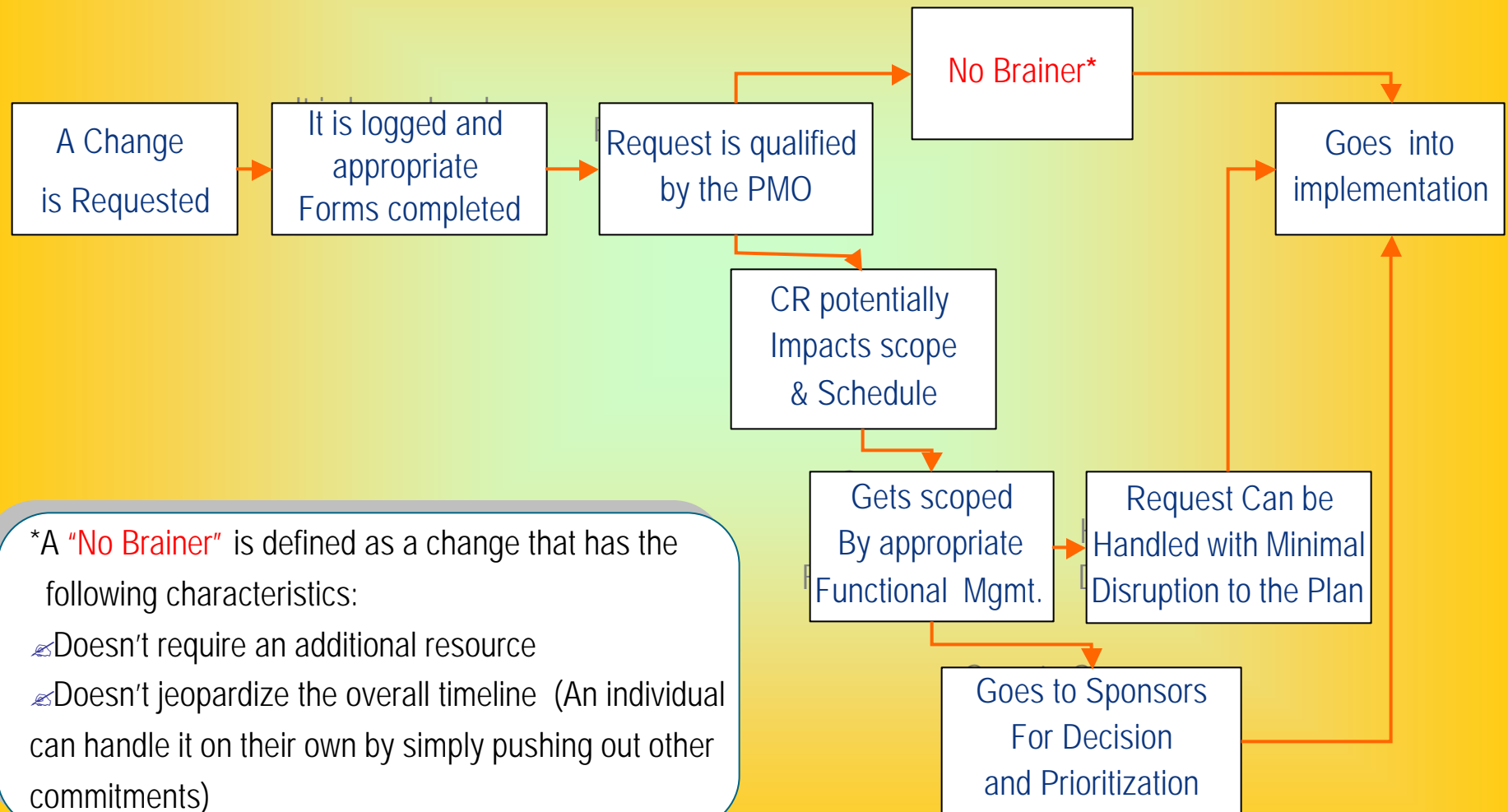
Project Engagement Managers Skill Matrix

Potential PEM	Asset Mgmt	Help Desk	Integration Related	KM	Reporting	SNO
Primary	Lorna	???	Ed N.	Lorna	Mark H.	Richard H.
Secondary	???	Norris	Norris	???	???	Kim P.
Expert Consultant	Frank	Bob	None	Lorna	Mark W.	Harry K.
Other/Geo Rep.	???	Pete	???	Tobi	???	Esther

The Build Phase

- ✍ Documented solution plan
- ✍ Documented process activity list
 - ✍ Project plan
- ✍ Procure/purchase required tools
- ✍ Develop solution
 - ✍ Unit testing
 - ✍ Package process, technology or product
 - ✍ Develop Q&A plan
- ✍ Evoke Change Management as needed

Change Request Model - Example



*A "No Brainer" is defined as a change that has the following characteristics:

- ✎ Doesn't require an additional resource
- ✎ Doesn't jeopardize the overall timeline (An individual can handle it on their own by simply pushing out other commitments)

The Test Phase

- ✍ Confirmation of test cases against customer requirements
- ✍ Test Data environment configured or simulated
- ✍ Test solution
- ✍ Capture results and forward to client for verification
- ✍ Archive test data and documentation

The Release Phase

- ✍ Confirm implementation plan
 - ✍ Should include support model
- ✍ Develop information *out* plan
 - ✍ Complete user training
 - ✍ Create and transmit communication
- ✍ Implement solution
- ✍ Capture of business solution feasibility
 - ✍ Client feedback/survey

Project Close Out

- ✍ Project acceptance and sign-off from client
- ✍ Documentation wrap up and archive
 - ✍ Final Project documents & status report
 - ✍ Lessons learned
 - ✍ Survey results reported
- ✍ Change Control implemented
- ✍ Solution wrap up

Typical PMO Membership and Roles

- ✍ Manager of Projects
- ✍ Project Admin
- ✍ Project Engagement or Relationship Manager
- ✍ Expert Consultant
- ✍ Functional Management
- ✍ Project Managers
- ✍ Resource Management (Pooled or flexible)
- ✍ Technical Analyst
- ✍ Business Analyst
- ✍ Quality Test Specialist
- ✍ Communications and/or Training Coordinator
- ✍ Sponsors

PMO Meetings

- ✍ Meeting has an agenda. It is posted and it is followed (***MUST***)
- ✍ Team uses roles: facilitator, timer, scribe
- ✍ Meetings are both efficient and effective.
- ✍ Meetings start on time!
- ✍ Ideas and outcomes are visibly scribed during the meeting
- ✍ Use virtual tools to assure everyone is on the same page....

PMO Meetings Cont.

- ✍ Facilitator and Team manages discussions that are off the topic
- ✍ Team is focused on current topic
- ✍ Actions and outcomes are clearly stated and captured
- ✍ Generally status discussions are discouraged (Status related discussions focus on the “doing” elements of a task. PMO meetings focus on what’s done...OFFLINE: Project shortfalls)

Why Keep Work Visible?

- ✍ Visibility of projects will communicate activity to management, clients and employees
 - ✍ It provides clarity as to the “sum” total of what the group is working on
 - ✍ It provides a view on what the relationship is between outcome against commitments
 - ✍ It helps eliminate duplication effort
- ✍ It helps reporting key activities

Projects Board Layout Elements

- ✍ Need a definition of fields as they relate to various project status elements. Can be **Red**, **Green** or **Yellow**
- ✍ “Project Type” define at an aggregate level the project category
- ✍ Site definition is useful for PMO’s that have multiple locations
- ✍ “Sponsors” can be an internal or external client.


Shaded background indicates a non-posted notice

Consulting and Research									
		Critical-Get Help		On Schedule		Needs Attention		Complete	
Home									
Status	Site	Project Type	Sponsor Name	Description	Project #	Project Manager	Projected Start	Projected End	
	CGC	Internal Projects	Ed Furilla	FutureSourcing Engagement Model Project <div style="border: 1px solid black; padding: 2px; display: inline-block;"> Project Documentation </div>	TBD	Hank Tarbi	14-May-2001 04:58 PM	31-Jul-2001 03:00 PM	

Projects Board Layout Elements – Cont.

- ✍ “Description” should include name of Product and related activity – Use verbs and nouns.
- ✍ “Project Number” can be an assigned task number or one that is issued to the project from an internal standpoint.
- ✍ “Project Manager” is the name of the individual responsible for managing the effort.

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Consulting and Research Home									
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A Short Tour of Managing the Change

- ✍ Executive Sponsorship: Who is the single most senior individual who sees themselves accountable and benefiting for the results of this effort?
- ✍ Change Agents: Who are the agents of this change?
- ✍ Change Target: Who is the recipient of the change?
- ✍ Business Rationale: From a \$ and cents standpoint what should we do this?
- ✍ Problem Definition and Solution Definition - What is the problem and the proposed solution?
- ✍ Implementation Teams: Who are those that will implement? By when and how?

Facilitating Change in Phases

Change Process



Thanks for your attention and interest!

Hank Tarbi

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