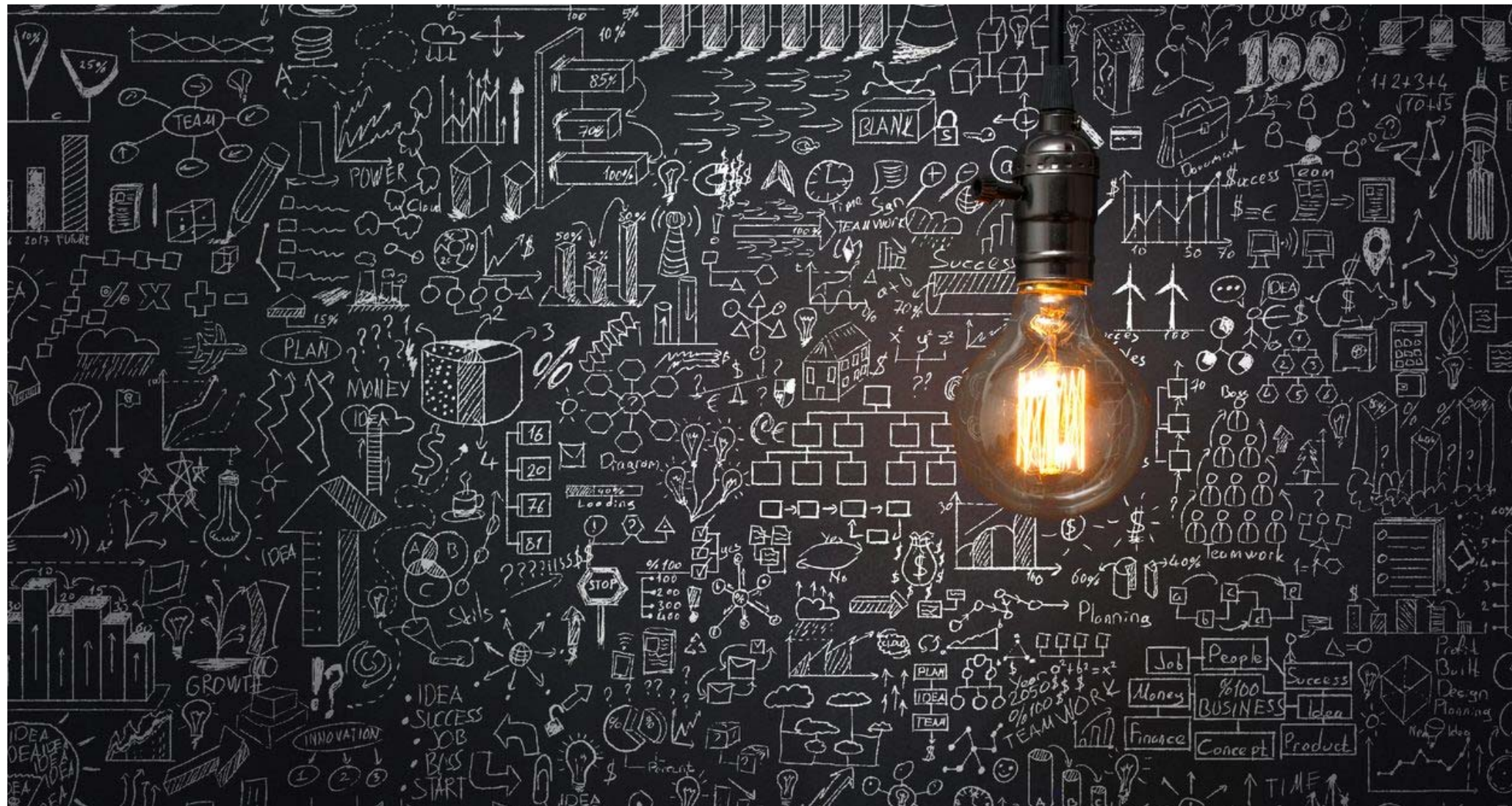


Project Management Office



Roles & Responsibilities

The High Performance Project Management Office

Commitment: PMO Leader goes to bat for each manager and steps in front of problems

Trust: PMO succeeds or fails as a group – expect to help peers and not be competitive

Purpose: How PMO fits into organization and what is expected of each team member

Communication: Problems shared immediately, with team approach to solving them

Involvement: Sponsors agree to mentor/help leaders, not just be a demanding client

Process Orientation: Let the business do the strategy, PMO quickly executes it

Continuous Improvement: Regularly discuss obstacles and problems as a PMO team

Unify the PMO Team

- Establish clearly defined roles and expect managers to follow an overall PMO methodology
- Recognize PMO wins and help managers handle failure – applaud transparency and seeking out help
- Hold PMO accountable and foster loyalty – PMO leader gives leaders unconditional support

Project Manager – Critical Skills



Project Manager Responsibilities – Build the Project Scope

Gather requirements

- Communicate effectively with non-technical stakeholders
- Work hard to understand the business need and ask for help getting educated on business processes
- Assess each stakeholder need and work through conflicts between competing requirements

Document problem statement

- Why is the project needed and why are current tools inadequate

Build the business case

- Business requirements – what is the overall project supposed to achieve for the business
- Functional requirements – actionable, measurable and testable steps to complete the project

Ensure regulatory compliance

- Have regulatory and legal review upfront project plan, which includes a summary of risks

Clear and agreed upon project outcomes

- State all objectives for project, using the appropriate business terminology
- Identify strong project sponsor and all major stakeholders before project starts

Project Manager Responsibilities – Functional Specifications

Obtain required approvals

- PMO Leader, IT Executive (CIO) and Project Sponsor approval
- Keep detailed document distribution and revision histories for all stakeholders

Minimize disruption to the business

- Plan for continuous communication and education to all affected employees
- Get upfront buy-in and agreement from stakeholder on impacts/disruption to current operations

Risk assessment & mitigation

- Identify potential threats and estimate the level/impact of each risk to project
- Share project plan with other project managers and ask for help identifying unforeseen risks

Eliminate duplicate software

- Include current systems and processes this project will sunset into the overall project plan

Project Manager Responsibilities – Delivering The Project

Maintain the Project Schedule

- Deliver project on time and within budget – any impacts immediately communicated
- Regular written updates for project sponsor, project stakeholders and the IT Executive
- Challenge and validate estimates received from project team members

Communication and Transparency

- Create visual tools for project plan and status updates that are easy for stakeholders to understand
- Use business terms in project communications, where possible, to make updates more understandable

Action Item Resolution

- Do not hide problems, but instead bring them to sponsor's/PMO leader's immediate attention
- Treat sponsor and stakeholders as team members, there to help resolve problems with project

Manage shifts in customer needs/expectations

- Scope and budget should be locked before project ever starts – all stakeholders agree upfront
- If there is an unavoidable change, take time to edit plan and update project timing

Project Manager Responsibilities – Manage the Execution Team

Resource Allocation

- Like the project manager, all team members need to understand exactly what is expected of them
- Create an open channel for communicating, so members can seek help/advice from entire team

Consistent and Scheduled Check-ins

- Weekly scheduled calls/meetings, same time, every week – no excuses for not making team meeting
- At least one off-schedule conversation with every project team member each week

Remove obstacles before they can disrupt project

- Identify resources and tools project members will need and make sure they are in place before needed
- Work ahead of each project resource to clear obstacles, ensuring high productivity and low downtime

Cross-PMO communication and collaboration

- Weekly leader meetings to discuss each project and get help/insights from other project leaders

Project Manager Responsibilities – Post Project

Customer/Employee Training

- User testing to see where employees may struggle with the new system/solution
- Tailor training and user documentation to challenges early testers are having with new technology

Project Documentation

- All project plans and schedules archived (system of record) for future reference
- Enough documentation for anyone in the PMO to fully understand and takeover the project, if needed

Project Debrief and Stakeholder Feedback

- Distribute survey to sponsor and stakeholders to be completed and sent to PMO Leader/IT Executive
- Self review of project to identify obstacles and best practices that benefit rest of PMO team
- Quarterly proactive check-in with project sponsor and one year review to gauge project success

PMO Leader Role – Charter Development & Implementation

All PMO activities are driving bottom line value

- CIO (technology side) and CEO (business side) must sign off on every single project plan
- Establish standard approach to project management that is to be used by all project managers
- Sell PMO as a “portfolio management” team with emphasis on dependencies between all projects

PMO Charter

- Sections for vision, mission, objectives, critical success factors, KPI, methodologies and structure
- Create like a business plan, show the value and ROI the PMO brings to the organization

Buy-in and involvement of executives

- Understand process variation in each business unit and work with managers to customize their approach
- Use clear and business-centric language to describe the PMO and each project
- Fully understand the current business strategy and help identify/plan some longer range goals

PMO Leader Role – Design and implement project methodology

Manage the PMO value proposition

- Function as the centralized integrator for the organization, with executive buy-in and support
- Maintain a project scorecard with direct feedback on all projects from project sponsors and CIO
- Develop and deploy a full life cycle project management methodology

Participate in strategic planning

- Investigate areas of company that might benefit from technology innovation/automation

Trusted advisor to upper management

- Educate business side on recent technology developments and how they may help the organization
- Offer proactive advice on business problems that have not yet been assigned to PMO
- Executive dashboard with status of every project being managed by the PMO

Reporting and transparency

- Team-specific and PMO meeting/chat/collaboration application, with access for project sponsors

Identification and Mitigation of Project Risks

Competitive: Threat of new entrant, new competitor feature, aging in-house technology

Economic: Impact on sales and revenue – speed to market and relevance of offering

Geographic: Proximity to and competition for needed resources – offshore possible?

Stakeholder: Will project sponsor stay engaged and be an active participant in project?

Political: How to forecast short and medium term health of the housing market

Regulatory: Need agile solutions that can be retrofitted to meet new regulations

Reputational: Risk/reward, cost/benefit – is there a path to project success?

Societal: Are we meeting the needs of future clients, providing right tools for customers?

Technological: Rapid rate of change requires faster turnarounds and flexible solutions

PMO Leader Role – Manage the project portfolio

Participate in strategic planning

- Viable project mix that meets organizations goals
- Re-rank projects because of a change in importance
- Evaluate new opportunities against current portfolio

Monitor planning and execution of projects

- PMO Leader never discusses a project with sponsor without project manager present
- Evaluate requests for new technology tools and platform investments

Provide information and recommendations to decision makers

- Emphasize processes that manage cost, schedule, and resource utilization
- Participate in identification, selection, and prioritization of new projects

Allocate resources between projects

- Assign project managers to each PMO project, aligning project needs to manager's skills

PMO Leader Role – Manage performance of the PMO

PMO staffing, management and retention

- Choose right balance between PM skills, attitude, organization fit and industry knowledge
- Conduct project management methodology staff training
- Develop competency of personnel, including 1:1 mentoring and knowledge sharing
- Track project progress against scope, milestones, timeline and budgets

Implement charter and standards for project managers

- Develop practices that can be reused and applied across other similar projects
- Deploy project cost, schedule, time management and document applications/repositories

Conduct post-project reviews

- Automate monitoring of client acceptance and system/solution usage
- Manage the project documentation archives
- Build and manage a risk and lessons learned database – reference for project managers