Table of Contents

The following are copies of actual working documents (with identifying data removed) developed and used in the establishment and implementation of Project Management Offices. They are provided as samples only and should be tailored for your specific needs before use.

The Project Management Office Framework Checklist 3-12

David Letterman Top Ten Ways to Obtain Executive Support 13-14

Planning Office Charter 15-20

Sample PMO Link to Strategy 21-22

Project Management Office Charter 23-34

Project Management Office Implementation Plan 35-52

Two Sample Implementation Work Breakdown Structures 53-64

Comprehensive List of PMO Documents 65-68

Job Description For Program Manager 69-72

PMO Personnel Interview Questions 73-78

Qualification Guidelines 79-82

How Can We Help Form 83-84

Technology Planning Framework Checklist 85-86

Tool Talk Matrix 87-90

Organizational Mastery Matrix…….91-92

Project Planning Matrices……93-98

The Project Management Office Framework Checklist

This PMO framework checklist was developed to help address the questions and issues PMOs face in defining, implementing, and managing a PMO.

The Project Management Office Framework Checklist

DEFINITION DECISIONS

Rationale

- □ What is the purpose for your project management office?
- Who should be involved in this discussion?
- What are the specific roles and responsibilities of each participant?
- □ How will you define your PMO?
- What are the organization's PMO needs?
- How will it evolve over time?
- How will you communicate this definition?
- □ What is your PMO vision and mission?
- What is the appropriate time horizon to implement the PMO?
- How will you gain consensus about this vision and mission?

Organizational Considerations

- □ What are the values and behaviors in you organization that could:
- Provide driving forces towards accomplishing your PMO goals?
- Become restraining forces from accomplishing your PMO goals?
- □ What are your strategic business drivers?
- How will they impact the PMO?
- How will the PMO support those business drivers?

- □ Will the PMO support all projects, programs, and the project selection process?
- How much project management process is already in place?
- Will the PMO focus on a specific business unit or the entire organization?
- Is there an existing project portfolio management process for the business unit(s), and will the PMO provide PM support to the Portfolio Management team(s)?
- □ How will the PMO balance ambition with capacity?
- How many projects and programs are there?
- What is their typical duration?
- How many people are typically assigned to projects and programs?
- What is the acceptable “stacking level” for projects and programs?
- What is the typical tracking intensity level for projects and programs?
- □ What environmental issues will impact your PMO?
- To what extent are you a matrix organization?
- How are team members assigned to projects or programs?
- What is the overall project management mastery of your organization and senior management?
- Where are you on the PMO continuum, and where would you like to evolve?
- □ What services will you offer your organization?
- How will you prioritize them?
- Where will you focus your initial offerings?
- To what extent will you rely upon internal vs. outsourced resources for your PMO?

- □ If you are planning a more formal PMO, where will it be located?
- Centralized?
- Decentralized?
- Hybrid?
- □ What will be the scope of authority for your PMO?
- Who will the PMO report to?
- Who will report to the PMO?

Potential Functions

- □ Will the PMO develop project management, program management, and portfolio management processes?
- How will they integrate them with other business processes?
- Who will own each process?
- How will each process be communicated in the short-term?
- How will the processes be supported in the long-term?
- □ Will the PMO support project management and internet-enabled collaboration tools?
- What tools are currently in use?
- How many users are there by tool?
- What is the overall competency with each tool (H, M, L)?
- Which tools will be supported by the PMO? How will they be supported?
- What templates would help promote the standard use of the tools?
- □ Will the PMO support project teams?
- Will they be an advisor or owner of overall project success?
- How much interaction will they have with teams throughout the project or program lifecycle?
- Where would they focus more of their time and attention in supporting teams?

- □ Will the PMO provide planning support to project and program teams?
  - Will they offer on-site or remote support?
  - Will they facilitate start-up workshops?
  - Will they assist with the validation process?
- □ How will the PMO provide execution support to project and program teams?
  - How will they provide coaching?
  - Will they act as a tracking service to the teams?
  - Will they establish and maintain a centralized tracking and roll-up reporting process?
- □ Will the PMO play an active role in the portfolio management process?
  - Will they function as the portfolio management team?
  - Who will create and maintain the project registry?
  - How involved will they be in the creation and retention of an historical database?
  - What will be their role in providing feedback on the project selection process?
- □ What role will the PMO play in supporting organizational training in project management?
  - To what extent will the PMO staff conduct training themselves versus manage outsourced training experts?
  - How will the PMO leverage the organization's investment in training?
- □ To what extent will the PMO take a leadership role in project intellectual capital?
  - How will they harvest the project intellectual capital?
  - How will they leverage the project intellectual capital across the organization?
- □ Will the PMO archive project-specific data for all projects?
  - Baseline information
  - Lessons learned
  - Issues log
  - Etc.
- □ Will the PMO manage general project data and facilitate/coordinate the information among teams?
  - Project templates
  - Lessons learned
  - Completion criteria for common tasks among projects
  - Etc.

IMPLEMENT THE PMO

Validation

- □ Who will need to be involved in establishing the PMO's goals?
  - What will be the critical success factors for the PMO?
  - What will be the documented success criteria for the PMO?

- □ How will executive support of the PMO be engendered?
  - Who will you need to engage in the PMO implementation discussions?
  - How will you obtain their time, attention, and buy-in?
  - Who is your sponsor?
  - How do you know you have their full support?
- □ How will the PMO operate (i.e., corporate overhead, corporate tax, P&L)?
  - Have you analyzed the implications for the different options?
  - Who will decide which option it will be?
  - How will you interface with Finance to track start-up and steady-state costs?
- □ Have you planned the PMO implementation as a project?
  - Will you hold a start-up workshop?
  - Who will be on the implementation team?
  - How will you monitor and report progress?

Organization

- □ What will be contained in the PMO charter?
- Who will be responsible for creating the charter?
- Who will review the charter?
- Who will approve the charter?
- □ How will you secure the best leader possible for your PMO?
- What are the advantages and disadvantages of hiring from within vs. outside the organization?
- How will you ensure the PMO leader can plan and manage the PMO both during start-up and as it evolves?
- □ What is the ideal staffing level for your PMO?
- What skills, capabilities, and behaviors do you want to hire first? Why?
- How will you validate that potential PMO hires can perform well in your organization?
- What are the advantages and disadvantages of selecting from an internal pool of candidates and an external one?
- □ How will you clarify PMO roles and responsibilities?
- How will you manage role conflict within the PMO and with others in the organization?
- How will you determine the scope of responsibility for each staff member of the PMO?
- How can you ensure the staff can "scale" their skills and continue to add value as the PMO evolves?

Infrastructure Requirements

- □ Where should the PMO be located?
- how will the PMO's location be viewed by the rest of the organization?
- How will the PMO serve the needs of remote team members?

- □ How will the PMO establish its own operating guidelines?
- How much rigor will need to be applied in developing the PMO's operating guidelines?
- How can the entire PMO staff in creating and documenting the PMO operating guidelines?
- What leveragability do the Operating Guidelines have for other PMO activities?
- □ How will the PMO create and implement project management methods and standards?
- How much flexibility will there be in the application of the methods and standards?
- Who will own the methods and standards?
- How will you manage innovations of the methods and standards?

Integration

- □ What is the ideal communication strategy for your PMO, customers, and organization?
- What are the key messages and "nuggets of truth"?
- What communication techniques will engage and maintain the interest of your customers?
- Who on the PMO team will be responsible for planning and executing PMO communications?
- □ How will your PMO implementation be phased?
- By deliverables? By timeframe? By goals?
- How will you ensure continuity among the phases?
- How will you leverage the lessons learned and incorporate them into the next phase?
- □ What are your barriers and enables of a successful PMO implementation?
- How can you leverage the enablers and successes of other PMOs?
- How can you manage the barriers as risks?

- □ How will you prepare for the transition from implementation to management of the PMO?
- ● What is the appropriate event to celebrate this transition and acknowledge the accomplishments to date?
- ● How will you communicate the transition to the rest of the organization?
- ● How will you monitor potential pitfalls during the transition period?

MANAGE THE PMO

Cultivating the Customer-Oriented Environment

- □ How will you establish and maintain performance standards?
- ● How can staff meeting and interactions support the PMO performance standards?
- ● How can you monitor the PMO environment and ensure it is vibrant and innovative?
- □ What metrics are appropriate to establish and monitor the PMO's performance?
- ● What is the proper mix of objective and subjective feedback?
- ● How will you sensitize the PMO staff and customers about the metrics and behaviors supported by the metrics?
- □ Which consequences will be employed to reinforce the PMO environment?
- ● Are they appropriate for your organization?
- ● How will you deal with individual and team performance?
- □ How can you engineer all PMO jobs for optimal performance?
- ● How will you support the PMO staff in supporting global and virtual teams?
- ● How will you help the PMO staff manage conflict?

FUTURE TRENDS

Technology

- □ How will the technology enable organizational mastery of project management as a core competency?
- Where do you want to be on the technology adoption curve?
- How will you validate that technology's promises can live up to your organizational expectations and standards?

Leadership

- □ How will the PMO create and sustain a leadership role within the larger organization?
- How will the PMO monitor internal and external strategic inflection points?
- How will the PMO interact with other leaders in the organization?

David Letterman's Top Ten Ways to Obtain Executive Support

Here are some creative ideas to consider when seeking executive support.

David Letterman's Top Ten Ways to Obtain Executive Support

1. Understand the politics of your organization
2. Make sure the value proposition for the PMO is tied directly to organizational mastery
3. Market to the sponsor as well as his/her peers
4. Listen to what senior management talks about in formal and informal settings
5. Pick the most difficult adversary you can find and "sell" them; the worst skeptic will become your greatest advocate
6. Provide some specific success stories that relate to the senior management "hot buttons"
7. Ask many questions and avoid "over-talking"
8. Identify your key supporters and share what you have heard, what you have observed, how to approach the challenge, etc.
9. Consider creating a "chain of sponsorship" as enthusiasm does not always trickle down, so ally with people who can make you successful
10. Bring chocolate, the good kind, to all meetings!

Planning Office Charter

This sample charter was prepared for a single large program office with the intent of utilizing the processes and infrastructure developed as a model for future programs.

Charter of Planning Office

Objective

Provide methods, tools, and support to the {Program, Division, Department, Group, etc.} in creating and tracking a credible, integrated, approved program plan by {Date} for {appropriate Program Name, etc.}, and provide continuing support throughout the life cycle of the program.

Process Improvement Objectives

In addition to achieving the {Program, Division, etc.} objectives, {appropriate name of senior type} management has established the following process objectives:

Objective 1 - A credible, integrated schedule for each phase of the {Program name} will be developed and used to support the {Phase Exit, Life Cycle} Review Process.

Objective 2 - Early warnings of deviations from the plan will be provided by the schedule management process, together with the capability of performing "What if" analysis of alternate resolutions to schedule issues.

Objective 3 - Program schedule and process data will be maintained for use in assessing process effectiveness and business impact.

Objective 4 - Program management infrastructure developed for the initial phase will be evaluated, modified as necessary, and become the model for all future programs/projects within the organization. Quality program management processes will be institutionalized and set a framework for continuing improvement.

Exclusions from Objectives

The following objectives are explicitly excluded from the scope of the initial Planning Office support:

Attempt to allocate **all** individual contributors to the activities in the selected project schedules.

Tracking of personnel utilization.

Development and provision of enterprise-wide resource conflict planning procedures.

Support for detailed, bottom-up, credible schedules for non-critical partners.

Priority Matrix

Generally, the Planning Office priority matrix follows the {Program Name} priorities and is represented as follows:

	Least Flexible	Optimize	Most Flexible
Schedule			
Scope			
Resources			

Scope - The scope is deemed to be least flexible as there are necessary requirements to assure a quality project management process that delivers credible plans and timely reporting of status.

Schedule - The schedule is to optimized to provide controlled, schedule management practices as the earliest possible date.

Resources - The resources are deemed to be the most flexible as management has committed to provide the support necessary through a Planning Office to accomplish the stated objectives.

Success Criteria

A reference to the process improvement objectives listed on the previous page is referenced after each criterion. Metrics for all success criteria will be established no later than {Date}.

The {Program Name} plan is credible as defined in the following section, Characteristics of a Credible Plan. (Objective 1)

The program plan and schedule are maintained, after approval, by Phase and through the end of the Program. (Objective 1, 3 and 4)

The Planning Office reports summary status on a routine basis, at least monthly, to program management and all contributors to the program. (Objective 1 and 2)

Senior management inspects program summary status on a monthly basis. (Objective 1 and 2)

Section, project and program managers demonstrate good project management practice on the {Program Name}. (Objective 1)

The Planning Office will be actively involved in the required "re-planning" to optimize the schedule. (Objective 1, 2, 3 and 4)

No slips in major program milestones are announced less than one month before they are due. (Delays that could not be anticipated in the planning

process are excepted, e.g., a surprise regulatory change, or a surprise slip by a partner not using the planning process.) (Objective 2)

Project notebooks are used routinely by program managers and by most sub-project planners. (Objective 1 and 4)

A complete history of actual start and finish dates, and milestone state and date achievements is available and accessible at the conclusion of each appropriate Phase of the Program. (Objective 3)

All Planning Office deliverables noted in the following section, Deliverables, are provided on schedule. (Objective 4)

Senior management, the Program team, and affected function and project managers feel that the Planning Office contribution has been of high value. (Objective 4)

Characteristics of a Credible Plan

All of the following characteristics must be present to some extent for a program plan to be credible. The size, complexity and nature of the program determine the length and level of detail of each individual item.

The plan is well-defined and documented.

Bottom-up, detailed plans support the top-down goals.

Program interfaces are defined, agreed to, and documented.

Sub-project plans are integrated into a master plan.

All elements of the plan have consistent appearance and content.

Risk to the project has been carefully assessed and accounted for.

The plan has had systematic, independent, and expert review of technical content and of process effectiveness.

The plan has been reviewed and approved by the stakeholders.

Deliverables

The Program Manager is the owner of the program plan and project management methods. In stating these deliverables, the Planning Office accepts accountability for the delivery of the items.

Approved, integrated Program schedule data base

This is the controlled database which represents the approved plan. It is the baseline against which actual progress is reported.

Periodic status reports

Timely reporting of the progress of the program, and appropriate risk and issue analysis regarding the program schedule, throughout the life cycle of the program.

Program file - historical plan and schedule data

All key program data and documents are present in a defined, accessible location. All intermediate versions of the schedule data base from the approved baseline to final actual will be retained. This is referred to as the reference file and is typically static in nature.

Program notebook

An organized collection of the key program documents which are used in managing the program. These items are frequently referred to and most of them change each reporting period. This is referred to as the active file and is typically dynamic in nature.

Program management infrastructure documents

Developed and enhanced processes and documents in support of managing the Program.

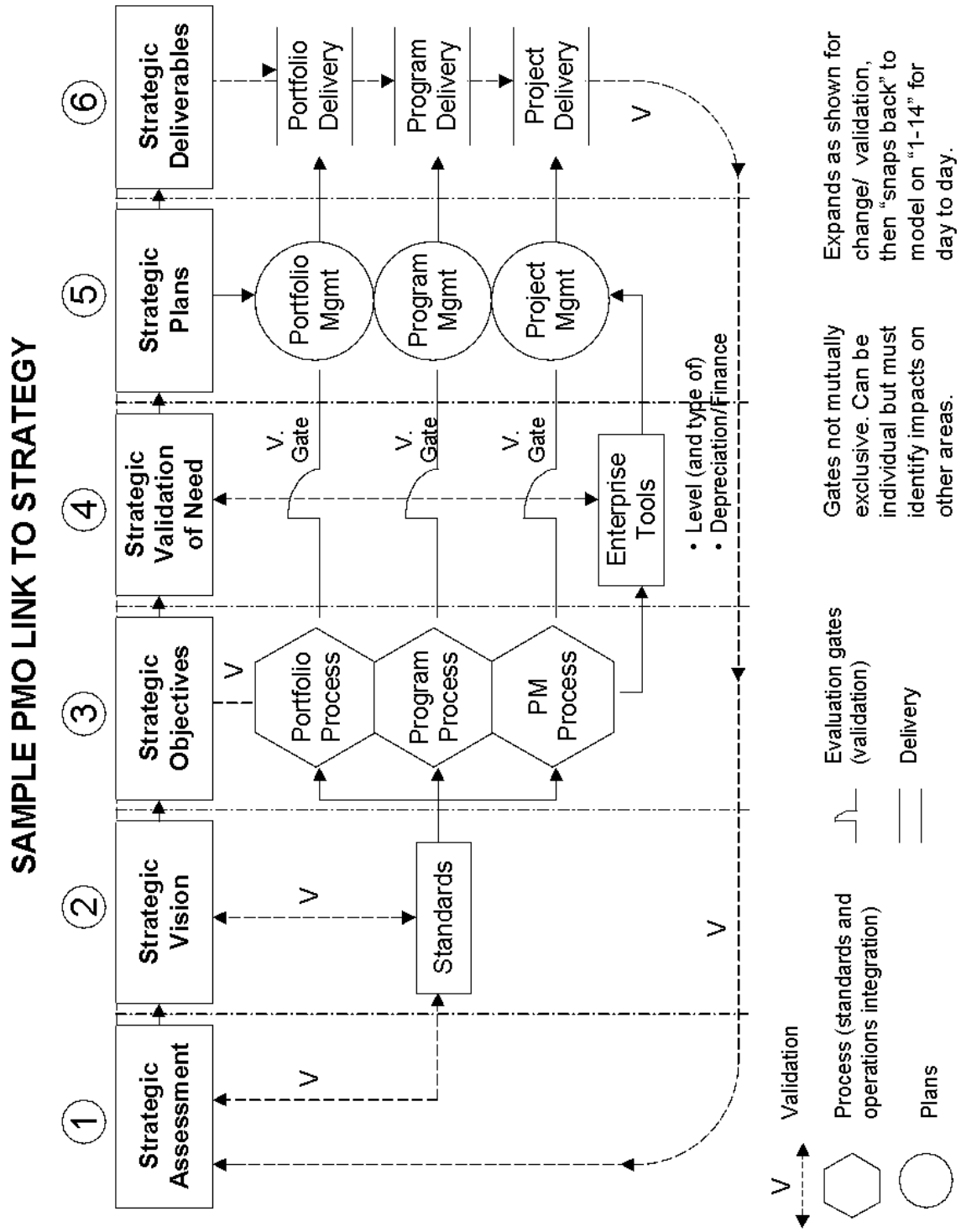
Value-added through provided support services

The Planning Office, as an extension of the Program Management, has an objective to provide added value in addition to the formal deliverables. This will be in the form of special analysis impact reports.

Sample PMO Link to Strategy

Here is an example of how one PMO plays an active link between strategy and tactics.

Sample PMO Link to Strategy



Project Management Office Charter

This sample charter was prepared for the establishment of a formal project management office within the IT Division of a major financial organization.

XYZ Project Management Office Charter

Date:

Summary

The following document constitutes the Project Management Office Charter and Roles and Responsibilities for the XYZ Company. It is comprised of eight sections and contains the following material.

- Background
- Objective
- Project Management Office Charter
- Staffing Considerations/Observations
- Professional Development
- Phased implementation approach
- Additional functions for consideration
- Next Steps/Recommendations

The total contents of this document represent the intended function and resource utilization of the Project Management Office in a fully functioning mode. However, the most prudent course of action will be to implement the Project Management Office in a "phased" manner, providing a basic set of core functions initially and then adding additional functions. This approach will be addressed generally in the section title "Phased Implementation Approach" and then in detail in deliverable number 3.5, PMO Implementation Plan".

Objective

The Project Management Office Infrastructure objective is to work with senior staff to develop the Project Management Office mission, vision, membership, roles and responsibilities, critical success factors, success criteria, Is/Is Not, staffing, professional development considerations and next steps.

Project Management Office Charter

Mission

The Project Management Office mission statement is intended to reflect the core function of the Project Management Office for the next 12 to 18 months. It reflects the office's central purpose and activities.

The project management office will serve as an internal consulting agency providing processes, tools, expertise, personnel, leadership and assistance to all departments regarding project and program management, portfolio management and process integration.

The project management office will provide:

- Processes
- Process interpretation and support
- Benchmarking and best practice development
- Tool leadership and support
- Project Management personnel assignment coordination
- Training assistance (SMEs)
- Internal consulting
- Project start-up support
- Repository services
- Continuous process improvement

The overriding objectives of the PMO within the organization are to reduce time to market, increase product quality and decrease costs.

Vision

The Project Management Office vision is intended to establish a 2 – 3 year goal for the Project Management Office. It is intended to be "visionary" and describe where the Project Management Office will strive to be within the established timeframe.

The XYZ Project Management Office and staff will be recognized experts in project management, portfolio management, best practices, processes, and tools. In addition to its current mission, the Project Management Office will establish metrics and begin optimizing the current project management and portfolio management process to support performance improvement objectives. The Project Management Office will assist in recruiting and developing XYZ project managers assigned to projects within functional departments. The Project Management Office will also provide leadership and support for other related processes such as customer relationship management and project time tracking.

Organization

The Project Management Office will report to the Director of Finance who reports to the CFO. The manager of the PMO will establish the PMO organization with the approval of the CFO.

The Director of Finance will participate as a member of the PMO Sponsor Team and the Portfolio Management Team (PMT). The PMO Manager will serve as the facilitator of the PMT.

Roles and Responsibilities

In this section, the major responsibilities of the Project Management Office are defined in terms of staff activities and the deliverables that will be produced.

Project Management	
Activities	**Deliverables**
♦ Own and maintain project management processes.	♦ Suite of usable project management processes ♦ Integration of PM processes with existing processes ♦ Process training ♦ Project management templates
♦ Develop project management standards and metrics	♦ PM standards ♦ PM Guidelines ♦ PM metrics
♦ Serve as internal consultant to projects and programs	♦ Participate in process training ♦ Coaching for project managers ♦ Planning workshops
♦ Serve as coordinator for external project management consultants	♦ List of recommended vendors ♦ *Assistance* in scoping, RFP and contracting for project management consultants
♦ Benchmark project management processes in other non-competing companies	♦ Benchmark reports ♦ Recommendations for improvements in XYZ processes
♦ Oversee project management process	♦ Plan quality reviews upon req. ♦ Advice to project managers ♦ Status updates to functional directors
♦ Prepare standardized project performance reports	♦ Standardized Metrics for project performance ♦ Standardized scope, schedule, budget, performance report templates
♦ Identify and communicate project management "best practices"	♦ "Best practice" media announcements ♦ "Best Practice" forums ♦ "Best Practice" library
♦ Establish dependency tracking process	♦ Documented dependencies ♦ Dependency tracking process
♦ Set standards for project document files and archive	♦ Project Document File process ♦ Project Document Archive for history & re-use
♦ Provide consultation/advice to Departments for recruiting & hiring project managers	♦ Job descriptions ♦ Recruiting & staffing assistance ♦ Mentoring
♦ Refine the PMO Implementation Plan	♦ Implemented PMO implementation plan

Project Management	
Activities	**Deliverables**
♦ Facilitate/participate in project close-out reviews	♦ Project close-out reviews ♦ Project close-out reports
♦ Document lessons learned	♦ Recommendations to improve project management processes ♦ Electronic archive of lessons learned
♦ "Market" project management	♦ Developed awareness in user community of processes, project managers & PMO ♦ Promote & publicize benefits of PM processes
♦ Provide new employee orientation in project management	♦ Periodic orientation sessions
♦ Next generation project time reporting	♦ Time reports
♦ Provide management support	♦ Ad-Hoc reports

Divisional Planning	
Activities	Deliverables
♦ Provide support to the Division objective setting process	♦ Planning documentation containing resource and cost information, budgets
♦ Provide project resource budgeting and forecasting assistance	♦ Resource budget/forecast scenarios based on validated assumptions
♦ Provide assistance in preparing status presentation material for Executive Committee	♦ Presentation materials ♦ Reports
♦ Develop project portfolio reporting	♦ Division wide reports

Project Portfolio Management	
Activities	Deliverables
♦ Take ownership of the portfolio management process application and support its use by functional and program managers	♦ Process ♦ Guidelines ♦ Facilitation
♦ Refine the portfolio management process, and customize it to fit XYZ business processes	♦ XYZ Project evolution roadmap ♦ Process documentation
♦ Provide process support to the portfolio management process and the Portfolio Management Team (PMT)	♦ Process consulting ♦ Chair PMT meetings ♦ Advise PMT Team

Project Portfolio Management	
Activities	Deliverables
♦ Support the Portfolio Management Team to establish project priorities	♦ Project portfolio reports ♦ Criteria for project prioritization ♦ Prioritized project portfolio
♦ Support the Project Registration process and provide guidance to sponsors and project managers registering projects	♦ Project registration templates ♦ Resource capacity/pool templates
♦ Support functional managers to estimate resource requirements for projects and to enter data into the portfolio management database	♦ Resource demand reports ♦ Resource templates
♦ Analyze the organization's capacity to accomplish the current and proposed projects	♦ Resource analyses ♦ Resource utilization reports ♦ Resource shortfall reports ♦ Reports based on "what-if" scenarios
♦ Produce portfolio management reports for the Portfolio Management Team	♦ (See reports listed above)
♦ Calculate metrics based on past performance	♦ Project & resource metrics
♦ Ensure Portfolio Management database integrity	♦ Backup recovery procedures ♦ Backup files

External Best Practices Repository	
Activities	Deliverables
♦ Learn about & collect best practices	♦ Best practice descriptions
♦ Create & maintain library of PM best practices	♦ Populated library ♦ Index & recovery system
♦ Support PMs with literature, tool reports & techniques from the library	♦ Resource consulting
♦ Document & distribute contents of library to users	♦ Listings ♦ Articles ♦ Summaries

Linkage to Change Control	
Activities	Deliverables
♦ Establish process to link scope, schedule, budget & priority changes to portfolio management	♦ Process for reporting changes to PMO
♦ Assess the impact of proposed scope, schedule & budget changes to the project portfolio	♦ Quantified assessments
♦ Advise PMT on change impacts	♦ Statements of the impact of proposed changes the project portfolio

Project History	
Activities	Deliverables
♦ Ensure retention of current project documents in a common location	♦ Current document repository with project data and documents (i.e. project plans, schedules, deliverables, project notebooks, post-mortems)
♦ Retain historical project data and deliverables (plans, schedules, resources, phase deliverables, etc.)	♦ Archive Repository with historical project data and documents (i.e. project plans, schedules, deliverables, project notebooks, post-mortems)

Tool Support	
Activities	Deliverables
♦ Serve as Project Management Software expert	♦ Internal consulting on use of tool ♦ Schedule templates ♦ Scheduling standards ♦ Coaching ♦ Help desk support
♦ Participate in Project management tool training	♦ SME participation
♦ Serve as Portfolio Management tool expert	♦ Updated resource pool ♦ New report templates ♦ Coaching ♦ Help desk support
♦ Participate in portfolio management tool training	♦ SME participation

Development Methodologies	
Activities	Deliverables
♦ Coaches the Project Team on XYZ Development Methodologies	♦ Advice to project managers ♦ Development Methodology internal consulting
♦ Oversees use of the Development Methodologies	♦ Reports to Functional managers
♦ Development Methodology new employee orientation	♦ Periodic orientation sessions
♦ Establish phase review process & criteria	♦ Orientation on phase review process
♦ Leadership in developing new Development Methodologies when required	♦ New Development Methodologies
♦ Maintains and continuously improves Development Methodologies	♦ Periodic Development Methodology revisions ♦ Benchmark reviews of non-competing companies

Administration	
Activities	Deliverables
♦ Coordinates the project management planning and portfolio management activities; manages the Project Management Office	♦ Tactical Plan for the Project Management Office
♦ Coordinate with Human Resources to develop appropriate job descriptions and career ladders	♦ Approved job description ♦ Project management career ladder
♦ Assumes clerical support of one person	♦ Schedules for workshops, coaching, project reviews, phase reviews ♦ Data entry when available ♦ Normal administrative assistant products

Critical Success Factors

Critical Success Factors represent what must "go right" or what must "occur" in order for the Project Management Office to accomplish its Mission. These are circumstances and/or events that must either be present or occur, and without which, could jeopardize the efficient functioning and ultimate effectiveness of the office and its staff.

- Senior management sponsorship of the Project Management Office.
- Organizational acceptance of the Project Management Office Charter and active participation in the project and portfolio management processes.
- Senior management recognition and acceptance of the need for development of project management as a unique core competency within the organization.
- Senior management and functional management willingness to "enforce" the process and deliverable requirements.
- The manager of the PMO must have direct access to the Division Head of the Finance Division and have no other responsibilities during the start-up of the PMO.
- Project staff availability to participate in laying the foundation for the Project Management Office (i.e. participate in classes, workshops, Portfolio Management implementation).
- Definition of Project Manager and Sponsor roles so they are consistent with "best practices" and clearly understood by the organization.
- Senior management champion(s) for the Project Management Office and the Project Management Capability Improvement Initiative objectives.
- Staff patience and perseverance based on the recognition that cultural changes take time and due diligence.

Success Criteria

Success Criteria represents the criteria by which the ultimate success of the Project Management Office will be measured. If these objectives are accomplished, it should result in a noticeable improvement in XYZ's project

management capability. A Project Management Maturity Assessment was completed at XYZ prior to implementing the new project management processes. It would be advisable to conduct the assessment again in one year to evaluate progress.

- The Project Management Office roles and responsibilities are clearly defined and understood by organization staff.
- Completion of the Project Management Office deliverables outlined in the Charter.
- Consensus from the organization that the Project Management Office Charter is focused on the right things and is adding value to the organization.
- Future improvement trends in meeting project schedules, scope, and budget.
- Project Portfolio Management is implemented and there is consensus that it is accomplishing its intended purpose.
- Project managers and teams understand and utilize the project management processes.
- Improvement in PMMA scores when repeated

Project Management Office Is/Is Not

IS	IS NOT
♦ Support to Project Managers	♦ Management of projects
♦ Consultation in selection of qualified project managers for permanent assignment to functional managers	♦ Management of projects for functions
♦ Project management process and deliverables definition	♦ Clerical
♦ Project management standards and guidelines	♦ Technical support (i.e. test plan review, code walk throughs)
♦ Recommendations for the minimum requirements for deliverables and process adherence	♦ Functional support/management (Resource management)
♦ Process compliance reviews	♦ Process enforcement
♦ Project management templates	♦ Determination of all project management processes and deliverables
♦ Project management best practices knowledge and support	♦ Specification of exact practices to use
♦ Best Practices Library	♦
♦ Ownership and facilitation of Portfolio Management Process	♦ Independent determination of project priorities
♦ Project management process expertise and consulting	♦ Process “police”
♦ Project management tools expertise and consulting	♦ Independent tool selection
♦ Project plan reviews upon request	♦ Project audits
	♦ Technical direction

Project Management Office Implementation Plan

This sample is an implementation plan (Project Description Document[PDD]) prepared for the implementation of a project management office for a medium sized service provider in the financial industry. This plan, along with an accompanying detailed schedule, was used to manage the PMO implementation to completion.

XYZ Corporation

Project Management Office

Implementation Plan

Table of Contents

Table of Contents **1-35**

XYZ Corporation Project Management Office Implementation Plan **1-37**

Introduction 1-37
Project Objective Statement 1-38
Major Deliverables – Target Dates and Owners 1-38
Flexibility Matrix 1-38
Major Deliverables 1-39
D1 Implementation Plan 1-39
D2 PMO Staff 1-39
D3 Project Management Resources 1-39
D4 Facilities 1-39
D5 PMO Operating Guidelines 1-39
D6 PM Process Doc Design & Production 1-39
D7 Project Management Tools 1-40
D8 PMO Tools 1-40
D9 PMO Training Plan 1-40
D10 Communications 1-40
D11 Collateral Materials 1-40
D12 Budget 1-40
D13 Preparation For Service Deployment 1-40
Summary Level Schedule 1-41
Project Team 1-41
Detailed Deliverable Descriptions (Is/Is-Not lists) 1-42
D1 Implementation Plan 1-42
D2 PMO Staff 1-42
D3 Project Management Resources (COE) 1-42
D4 Unique Facilities 1-43
D5 PMO Operating Guidelines 1-43
D6 PM Process Doc Design & Production 1-44
D7 Project Management Tools 1-44
D8 PMO Tools 1-45
D9 Training Plan 1-45
D10 Communications 1-45
D11 Collateral Materials 1-45
D12 Budget 1-45
D13 Preparation For Service Deployment 1-46

Appendix A Implementation Schedule **1-47**

Appendix B – Risk Management Plan **1-48**

Risk Assessment Matrix 1-48

Risk Management Planning Matrix 1-49

XYZ Corporation Project Management Office Implementation Plan

Introduction

Project Management processes and functions have been under development at XYZ Corporation for the past two to three years. However, the decision has now been made to integrate the implementation and oversight of these processes and functions under a single organizational entity, the Project Management Office.

Even though there has been considerable groundwork laid, successful implementation of a Project Management Office in an ongoing cultural environment is a challenging prospect with many subtle but very important requirements. This document constitutes the plan to implement the Project Management Office at XYZ Corporation.

This plan assumes that the necessary prerequisites (e.g. charter, etc) for the Project Management Office have been created or addressed.

It also assumes that the Project Management Office will be implemented in a phased manner, with the initial phase taking place over six to nine months and the final, or "full service" phase taking an additional twelve months. The Project Definition Document (PDD) portion of the plan addresses full PMO functionality. However, the schedule addresses only the initial phase.

Project Objective Statement

The Project Objective Statement (POS) for this Project Management Office Implementation Plan is as follows:

Establish XYZ Corporation Project Management Office and provide full Phase I services by XXXXXXXXXX..

Major Deliverables – Target Dates and Owners

The following are the target dates and owners for major deliverables. They will not be confirmed until the detailed, integrated project plan is completed, optimized and validated by the Project sponsor.

Major Deliverable	Target Date	Owner
D1: Implementation Plan		
D2: PMO Staff		
D3: Project Management Resources		
D4: PMO Facilities		
D5: PMO Operating Guidelines		
D6: PM Process Document Design & Production		
D7: Project Management Tools		
D8: PMO Tools		
D9: Training Plan		
D10: Communications		
D11: Collateral Materials		
D12: Budget		
D13: Preparation for Service Deployment		

For a detailed schedule of this project and the Microsoft Project Work Breakdown Structure file, see Appendix A.

Flexibility Matrix

	Least Flex	Mod Flex	Most Flex
Resources			✔
Scope		✔	
Schedule	✔		

For the XYZ Corporation PMO Implementation Project:

- *Schedule* is least flexible since Phase I services of the PMO must be implemented by year end XXXX.
- *Scope* is moderately flexible because some services could be moved to Phase II if necessary.
- *Resources* are most flexible because additional contract can be utilized where necessary.

Major Deliverables

There are thirteen major deliverables for the implementation of the Project Support Office. They are:

D1 Implementation Plan

This deliverable consists of a MS Word document describing the PMO implementation and a MS Project 98 schedule for the implementation. This plan constitutes this deliverable.

D2 PMO Staff

This deliverable consists of defining the staffing requirements for the PMO and acquiring and training the necessary staff.

D3 Project Management Resources

This deliverable consists of defining and acquiring the necessary project management resource pool.

D4 Facilities

This deliverable consists of defining and acquiring all necessary PMO facilities.

D5 PMO Operating Guidelines

This deliverable consists of determining and writing those operational procedures necessary for the project management office.

D6 PM Process Doc Design & Production

This deliverable consists of design and production of project management process documentation.

D7 Project Management Tools

This deliverable consists of determining the existing set of project management tools at XYZ Corporation and establishing usage guidelines and supporting staff for those tools.

D8 PMO Tools

This deliverable consists of defining the set of tools to be used by the PMO and establishing guidelines and templates for the tools.

D9 PMO Training Plan

This deliverable consists of determining necessary training for PMO staff, project leaders and project teams and establishing training mechanisms and schedules.

D10 Communications

This deliverable consists of writing a communication plan and conducting all PMO start-up communications.

D11 Collateral Materials

This deliverable consists of the design of materials to encourage the use of, and easy understanding of project management processes. It also includes the development of some web site content.

D12 Budget

This deliverable consists of the development of the budget for the project management office central operations and center of excellence.

D13 Preparation For Service Deployment

This deliverable consists of the actual preparation for service deployment after the processes, tools and personnel are in place.

Summary Level Schedule

As stated above, the PMO will be implemented in a phased manner with the following major milestones:

Appoint PMO Manager XX/XX/XXXX

Initial Start-up Complete (Phase 1) XX/XX/XXXX

Full Implementation Complete (Phase 2) XX/XX/XXXX

The PMO implementation schedule is included as Appendix A.

Project Team

Deliverable #	Lead	Contributors
D1: Implementation Plan		
D2: PMO Staff		
D3:Project Management Resources (COE)		
D4: PMO Facilities		
D5: PMO Operating Guidelines		
D6: PM Process Document Design & Production		
D7: Project Management Tools		
D8: PMO Tools		
D9: Training Plan		
D10:Communications		
D11: Collateral Materials		
D12:Budget		
D13: Preparation For Service Deployment		

Detailed Deliverable Descriptions (Is/Is-Not lists)

The following deliverable descriptions apply to the *implementation* of the PMO and not to the PMO itself. Is/Is-Not lists for the PMO are contained in the PMO Charter.

D1 Implementation Plan

Is	Is Not
♦ Phase 1 only	♦ Later phases
♦ Modified PDD (Project Definition Document)	♦
♦ Schedule	♦
♦ Coordinated with ⇒ XXXXXXX ⇒ XXXXXXX	♦

D2 PMO Staff

Is	Is Not
♦ Analysis of required staff	♦ PMO Division Head
♦ Skill sets & staffing levels document	♦ Resource pool
♦ Career ladder & job family descriptions	♦ Interviews
♦ Appropriate personnel requisitions	♦ Offer preparation
♦ All staff assigned to PMO	♦ Offer tracking
♦	♦ Hiring
♦	♦

D3 Project Management Resources (COE)

Is	Is Not
♦ Determination of requirements	♦ Assuming ownership of all currently existing non-systems project managers
♦ Project management job family	♦
♦ Hiring	♦
♦ Assignment to projects/functional managers/service managers	♦
♦ Assuming ownership of all systems project managers	♦
♦ Career ladder	♦
♦ Job descriptions	♦

D4 Unique Facilities

Is	Is Not
♦ Lab Space	♦ Facilities for all resource pool project managers
♦ War Room	♦ Work stations
♦ PMO Library Space	♦ Telephones
♦ "Temporary" COE space	♦ Computers
♦	♦ Software applications

Is	Is Not
♦	♦ Supplies
♦	♦ Security
♦	♦

D5 PMO Operating Guidelines

Is	Is Not
♦ Notebook of procedures	♦ Portfolio Management
♦ Drafted by XXXXXX	♦ Formatting or Printing
♦ Reviewed & approved by XXXX	♦
♦ Set of procedures including: ⇒ Resource acquisition, training and management ⇒ Interface mgmt ⇒ Communications mgmt ⇒ Project management mentoring ⇒ Best practices ⇒ Project records archive ⇒ Roll-up & reporting ⇒ Escalation ⇒ Tool support ⇒ Continuous improvement ⇒ Project office strategic planning	♦ Project management processes
♦	♦

D6 PM Process Doc Design & Production

Is	Is Not
♦ Graphic design of process documentation format	♦ Writing of new process content
♦ Formatting & final proofing of process documentation	♦ Final approval of processes
♦ Production & printing of process documentation	♦ Process redefinition
♦	♦

D7 Project Management Tools

Is	Is Not
♦ PM Tool Strategy	♦ Financial policies
♦ Time tracking interface	♦ Portfolio management
♦ Interface to development tools	♦ Time tracking tool
♦ Scheduling tool	♦ Project budgeting process/tool
♦ Action item database	♦ Repository for Business As Usual project activity
♦ Risk management database & tools	♦ Project cost accounting
♦ Change management database	♦
♦ Project resource management tool	♦
♦ Project estimating tool	♦
♦ Repository	♦
♦ Web site	♦

D8 PMO Tools

Is	Is Not
♦ Includes all PMO tools	♦ Used by projects
♦ Process improvement	♦
♦ Surveys	♦
♦ Metrics database	♦
♦ Resource pool tracking/management	♦
♦ Templates	♦

D9 Training Plan

Is	Is Not
♦ PMO staff	♦ Recurring training delivery
♦ Resource pool	♦
♦ Training definition	♦
♦ Project teams	♦
♦ XYZ Corporation management	♦
♦ Pilot courses	♦

D10 Communications

Is	Is Not
♦ Single document	♦ Actual communication after start-up
♦ Written plan	♦

Is	Is Not
♦ Includes start-up communication	♦
♦ Includes plan for continuing communications	♦
♦ Includes suggested formats	♦

D11 Collateral Materials

Is	Is Not
♦ "Helps"	♦ Project status info
♦ Guides	♦ Project management processes
♦ "Marketing" materials	♦
♦ Some web site content	♦

D12 Budget

Is	Is Not
♦ PMO cost center	♦ Business projects
♦ PMO projects	♦
♦ PMO B.A.U.	♦
♦	♦

D13 Preparation For Service Deployment

Is	Is Not
♦ Announcement of services provided - XXXX Operations Office - Risk Mgmt Consulting - PM Consulting - Project Start-up Support - Tool operational support - Project Oversight	♦ Actual services
♦ Preparation for process support	♦
♦ Preparation for process oversight	♦
♦ Comprehensive list of services provided	♦
♦ TO: Service Managers Project Managers Project teams	♦
♦	♦

Appendix A Implementation Schedule

The attached schedule contains a moderate level of detail and supports phase one of the PMO implementation.

This schedule may require further detail and optimization.

Appendix B – Risk Management Plan

The risk assessment matrix and risk management planning matrix will be reviewed and updated periodically during the implementation project.

Risk Assessment Matrix

	Risk				
1					
2					
3					
4					
5					
6					
7					

	Risk				
8					
9					
10					
11					
12					
13					

Risk Management Planning Matrix

	Preventive Action	Contingency Plan	Trigger	
	♦	♦	♦	♦
	♦	♦	♦	
	♦	♦	♦	
	♦	♦	♦	♦
	♦	♦	♦	♦
	♦	♦	♦	♦
	♦	♦	♦	♦
	♦	♦	♦	♦
	♦	♦	♦	♦
	♦	♦	♦	♦
	♦	♦	♦	♦

Two Sample Implementation Work Breakdown Structures

The following are two different sample PMO implementation work breakdown structures. Although there is a general flow which implementation should follow, there are many variations on the details of implementation. These samples illustrate two different approaches: one for building a PMO from "ground zero" and one for re-engineering a PMO using the PMO Roadmap™.

Sample PMO & Program Mgt Proposal

ID	Task Name	Pred
0	**Enterprise-Wide PMO Infrastructure & Program Management Implementation**	
1	**Methodology Manual**	
2	MD#1 Methodology Manual Begin	389
3	**Define Project Management Maturity Roadmap**	
4	Identify Maturity Objectives	2
5	Determine Maturity Assessment Strategy	4
6	Schedule Interviews & Document Reviews	5
7	Perform Maturity Assessment	14SS,19SS,6S
8	Analyze & Evaluate Findings	7,284,259,22
9	Customize Maturity Roadmap	8
10	Maturity Roadmap Complete	9
11	**Establish Project Management Process Methodology**	
12	**Project Lifecycles**	
13	Establish & Review Project Portfolio Management Requirements	6SS
14	Review Existing Lifecycle Practices	6SS
15	Determine Lifecycle Categories	13,14,10
16	Determine Lifecycle Standardization Scope & Constraints	15
17	Obtain Approval for Lifecycles & Application Guidelines	16
18	**Organizational Structure**	
19	Review Organization Structure	6SS
20	Obtain Feedback on Cross-Functional Challenges	19
21	Analyze Existing Project Team Structures	20
22	Review Matrix Options vs. Pure Project Teams in Context	21
23	Provide Recommendations for Improved Project Team Structuring	22,10
24	**Portfolio Management Process Guide**	
25	**Define Process for Portfolio Management Environment**	
26	Review Existing Processes, Procedures, Standards, Templates (Portfolio Environm	6SS
27	Define Processes, Procedures, Standards (Portfolio Environment)	26,10
28	Produce Templates & Guidelines (Portfolio Environment)	27
29	Test Portfolio Environment Implementation	28
30	Obtain Approval for Portfolio Environment Processes, Procedures, Standards, Tem	29
31	**Define Process for Prioritizing Project Work**	
32	Review Existing Processes, Procedures, Standards, Templates (Project Prioritizati	6SS
33	Define Processes, Procedures, Standards (Project Prioritization)	32,10,27
34	Produce Templates & Guidelines (Project Prioritization)	33
35	Test Project Prioritization Implementation	34
36	Obtain Approval for Project Prioritization Processes, Procedures, Standards, Temp	35
37	**Define Process for Determining Resource Capacity and Demand**	
38	Review Existing Processes, Procedures, Standards, Templates (Resource Capacit	6SS
39	Define Processes, Procedures, Standards (Resource Capacity & Demand)	38,10
40	Produce Templates & Guidelines (Resource Capacity & Demand)	39,33
41	Test Resource Capacity & Demand Implementation	40
42	Obtain Approval for Resource Capacity & Demand Processes, Procedures, Standa	41
43	**Define Process for Optimizing Project Portfolios**	
44	Review Existing Processes, Procedures, Standards, Templates (Portfolio Optimiza	6SS
45	Define Processes, Procedures, Standards (Portfolio Optimization)	44,10,39
46	Produce Templates & Guidelines (Portfolio Optimization)	45
47	Test Portfolio Optimization Implementation	46
48	Obtain Approval for Portfolio Optimization Processes, Procedures, Standards, Tem	47
49	**Define Process for Mastering Project Portfolios**	
50	Review Existing Processes, Procedures, Standards, Templates (Portfolio Mastery'	6SS
51	Define Processes, Procedures, Standards (Portfolio Mastery)	50,10,45
52	Produce Templates & Guidelines (Portfolio Mastery)	51
53	Test Portfolio Mastery Implementation	52
54	Obtain Approval for Portfolio Mastery Processes, Procedures, Standards, Templat	53
55	**Program Management Process Guide**	

IPS Proprietary Information Page 1 Tue 6/26/01 1

Sample PMO & Program Mgt Proposal

ID	Task Name	Pred
56	**Define Process for Initiating Programs**	
57	Review Existing Processes, Procedures, Standards, Templates (Program Initiation)	6SS
58	Define Processes, Procedures, Standards (Program Initiation)	57,10,51
59	Produce Templates & Guidelines (Program Initiation)	58
60	Test Program Initiation Implementation	59
61	Obtain Approval for Program Initiation Processes, Procedures, Standards, Templat	60
62	**Define Process for Defining and Organizing Programs**	
63	Review Existing Processes, Procedures, Standards, Templates (Program Define &	6SS
64	Define Processes, Procedures, Standards (Program Define & Organize)	63,10,58
65	Produce Templates & Guidelines (Program Define & Organize)	64
66	Test Program Define & Organize Implementation	65
67	Obtain Approval for Program Define & Organize Processes, Procedures, Standard	66
68	**Define Process for Planning Programs**	
69	Review Existing Processes, Procedures, Standards, Templates (Program Planning	6SS
70	Define Processes, Procedures, Standards (Program Planning)	69,10,64
71	Produce Templates & Guidelines (Program Planning)	70
72	Test Program Planning Implementation	71
73	Obtain Approval for Program Planning Processes, Procedures, Standards, Templat	72
74	**Define Process for Tracking and Managing Programs**	
75	Review Existing Processes, Procedures, Standards, Templates (Program Track &	6SS
76	Define Processes, Procedures, Standards (Program Track & Manage)	75,10,70
77	Produce Templates & Guidelines (Program Track & Manage)	76
78	Test Program Track & Manage Implementation	77
79	Obtain Approval for Program Track & Manage Processes, Procedures, Standards,	78
80	**Define Process for Closing Out Programs**	
81	Review Existing Processes, Procedures, Standards, Templates (Program Closeou	6SS
82	Define Processes, Procedures, Standards (Program Closeout)	81,10,76
83	Produce Templates & Guidelines (Program Closeout)	82
84	Test Program Closeout Implementation	83
85	Obtain Approval for Program Closeout Processes, Procedures, Standards, Templa	84
86	**Project Management Process Guide**	
87	**Define Process for Defining and Organizing Projects**	
88	Review Existing Processes, Procedures, Standards, Templates (Project Define &	6SS
89	Define Processes, Procedures, Standards (Project Define & Organize)	88,10,82
90	Produce Templates & Guidelines (Project Define & Organize)	89
91	Test Project Define & Organize Implementation	90
92	Obtain Approval for Project Define & Organize Processes, Procedures, Standards,	91
93	**Define Process for Planning Projects**	
94	Review Existing Processes, Procedures, Standards, Templates (Project Planning)	6SS
95	Define Processes, Procedures, Standards (Project Planning)	94,10,89
96	Produce Templates & Guidelines (Project Planning)	95
97	Test Project Planning Implementation	96
98	Obtain Approval for Project Planning Processes, Procedures, Standards, Template	97
99	**Define Process for Tracking and Managing Projects**	
100	Review Existing Processes, Procedures, Standards, Templates (Project Track & M	6SS
101	Define Processes, Procedures, Standards (Project Track & Manage)	100,10,95
102	Produce Templates & Guidelines (Project Track & Manage)	101
103	Test Project Track & Manage Implementation	102
104	Obtain Approval for Project Track & Manage Processes, Procedures, Standards, T	103
105	Finalize & Consolidate Knowledge Area Documentation	112,17,23,104,
106	Methodology Documented	105
107	**Establish Methodology Manual Documentation & Update Procedures**	
108	Define File Hosting & Access Control Procedure	2
109	Define Document Version Control Procedure	108
110	Define Document Change Management Procedure	109
111	Define Secure Document Archiving Procedure	110

Sample PMO & Program Mgt Proposal

ID	Task Name	Pred
112	Obtain Approval for Documentation & Update Procedures	111
113	**Define Communication, Training & Institutionalization Strategy**	
114	**Develop Methodology Manual CBT**	
115	Determine Scope of CBT (Computer-Based Training)	2
116	Define CBT Design & Functionality Specifications	115
117	Record Screencam CBT Program for Methodology Manual	116,106
118	Test Screencam CBT Functionality, Usability, Reliability, Performance	117
119	Obtain Approval for CBT Rollout	118
120	Computer-Based Training Tool Approved	119
121	Develop Plan for PM Knowledge Base Institutionalization	106
122	Develop Plan for PM Maturity Improvement	10
123	Develop Plan for CBT Rollout	115
124	Integrate Deployment Plans for Maturity Improvement, PM Knowledge Base Institutionalizatior	121,122,123,12
125	Obtain Approval for Deployment Program Plan	124
126	Deployment Program Plan Approved	125
127	Implement Deployment Plan	126
128	MD#1 Methodology Manual Complete	10,127
129	**Project Management System**	
130	MD#2 PM System Begin	5
131	**Determine Software Partner**	
132	Determine Criteria for Nomination	130
133	Draw up list of Nominees	132
134	Draw up List of Customer Nominees	132
135	Generate Input for Alternatives & Recommendations	134,133
136	Determine Criteria for Evaluation	135
137	Shortlist Preferred Partners	136
138	Prepare and Issue RFP	137,142
139	Review, Discuss & Select Software Partner	138
140	Engage Software Partner	139
141	**Define PM System**	
142	Identify PM System Needs & Objectives	105,126
143	Identify & Evaluate Alternative Approaches	140
144	Reach Agreement on Preferred Approach	143
145	Define Hardware Requirements	144
146	Obtain Approval for Hardware Acquisition	145
147	Produce System Functionality Requirements Document	145,272
148	Obtain Approval for System Functionality Requirements	147
149	Produce System Design & Navigation Specifications Document	148,272
150	Obtain Approval for System Design & Navigation	149
151	**Produce Software Development Plan**	
152	Define SW Integration Management Process	150
153	Define Version Control Procedure	150
154	Define Configuration Control Procedure	150
155	Define Release Management Process	150
156	Define Change Management Procedure	150
157	Define Defect Management Procedure	150
158	Define Risk Management Procedure	150
159	Define Issues Management Procedure	150
160	Define Test Plan	150
161	Obtain Approval for Software Development Plan	152,153,154,15
162	PM System Defined	161
163	**Implement PM System (Project, Program, Portfolio)**	
164	Acquire Development Platform	146
165	**Code Prototype Software**	
166	Code System Outline Modules	161,164
167	Code Planning Modules	161,164

IPS Proprietary Information Page 3 Tue 6/26/01 3

Sample PMO & Program Mgt Proposal

ID	Task Name	Pred
168	Code Tracking Modules	161,164
169	Code Reporting Modules	161,164
170	Code System Interfaces	166,167,168,16
171	Code Integration Modules	170
172	PM System Coding Complete	171
173	Develop and Integrate Project Portfolio Management System	161,164
174	**Test Prototype Software**	
175	Test Outline Modules	166,173
176	Test Planning Modules	167
177	Test Tracking Modules	168
178	Test Reporting Modules	169
179	Test Interfaces	170
180	Perform Integration Testing (Alpha)	171,175,176,17
181	Conduct Prototype UAT 1 (Beta)	180
182	Assess UAT 1 Results	181
183	Refine Prototype System	182
184	Conduct Prototype UAT 2	183
185	Assess UAT 2 Results	184
186	Resolve Defects	185
187	PM System Testing Complete	186
188	**Rollout PM System**	
189	Prioritize Outstanding Defects	187
190	Provide Defect Resolution Schedule	189
191	Obtain Approval for PM System Release	190
192	Release PM System	191
193	Populate and Validate PM System	192
194	**Develop PM System Manuals**	
195	Develop User Manual	171
196	Obtain Sign-Off on User Manual	195,184
197	Distribute User Manual	196,192
198	Develop Operations Manual	171
199	Obtain Sign-Off on Operations Manual	198,184
200	Distribute Operations Manual	199,192
201	PM System Documentation Complete	197,200
202	MD#2 PM System Complete	162,187,201,17
203	**Trained Users**	
204	MD#3 Trained Users Begin	389
205	**E-Learning Space**	
206	Design and Implement an Initial Project Management E-Learning Space	128,210
207	Incorporate Methodology Manual CBT Help Files	206FF
208	Incorporate PM System Overview into E-Learning Space	207,187
209	**Train & Coach Sponsors, Managers, Team Members & Support Staff**	
210	Define Needs & Objectives	204
211	Identify Trainers	210
212	Identify Participants	210
213	Communicate Training Objectives and Rationale	212
214	**Conduct Methodology Training**	
215	Structure Training Sessions (Methodology)	213,128
216	Produce Training Materials (Methodology)	215
217	Obtain Approval for Training Materials (Methodology)	216
218	Mass Produce Training Materials (Methodology)	217,221
219	Identify & Secure Training Locations (Methodology)	215
220	Schedule Training Sessions (Methodology)	219
221	Obtain & Confirm Participant Availability (Methodology)	220
222	Conduct Training & Coaching for Methodology	221,218
223	Methodology Users Training Complete	222

Sample PMO & Program Mgt Proposal

ID	Task Name	Pred
224	**Conduct PM System Training**	
225	Structure Training Sessions (PM System)	202,213
226	Produce Training Materials (PM System)	225
227	Obtain Approval for Training Materials (PM System)	226
228	Mass Produce Training Materials (PM System)	227,231
229	Identify & Secure Training Locations (PM System)	225
230	Schedule Training Sessions (PM System)	229
231	Obtain & Confirm Participant Availability (PM System)	230
232	Conduct Training & Coaching for PM System	231,228
233	PM System User Training Complete	232
234	**Conduct PMO Training**	
235	Structure Training Sessions (PMO)	323,213
236	Produce Training Materials (PMO)	235
237	Obtain Approval for Training Materials (PMO)	236
238	Mass Produce Training Materials (PMO)	237,241
239	Identify & Secure Training Locations (PMO)	235
240	Schedule Training Sessions (PMO)	239
241	Obtain & Confirm Participant Availability (PMO)	240
242	Conduct Training & Coaching for Project Operations Room usage	241,238
243	PMO Users Training Complete	242
244	**Train & Coach PMO Personnel for Methodology, PM System and Project Operations R**	
245	Produce Train-the-PMO Trainer Manual	235,323,213
246	Schedule Train-the-PMO Trainer Coaching Sessions	211,245
247	Conduct Train-the-PMO Trainer Coaching (Methodology)	246,211,128
248	PMO Personnel Trained in Methodology	247
249	Conduct Train-the-PMO Trainer Coaching (PM System)	246,211,202
250	PMO Personnel Trained in PM System	249
251	Conduct Train-the-PMO Trainer Coaching (PMO)	211,246,323
252	PMO Personnel Trained in PMO	251
253	Validate PMO Personnel Ramped	252,248,250
254	MD#3 Users Trained	223,10FF,126F
255	**Operationalized Project Management Office**	
256	MD#4 Operationalized Project Management Office (PMO) Begin	6
257	**Establish PMO Operating Model**	
258	**Establish PMO Vision**	
259	Determine Existing PMO Strengths & Weaknesses	256
260	Determine PMO Success Criteria & Metrics	259
261	Create PMO Conceptual Model	260,10
262	Obtain Approval of Conceptual Model	261
263	**Establish PMO Mission & Charter**	
264	Define PMO Mission & Charter	262
265	Obtain Approval of PMO Mission & Charter	264
266	Communicate PMO Mission & Charter	265
267	**Define PMO Information Management Process**	
268	Determine Methodology Inputs and Outputs	23,15,4,266,27
269	Define PMO Information Requirements	268
270	Define Other Project Information Requirements	269
271	Determine Integration with Existing Processes	270
272	Determine PM System Inputs & Outputs	271
273	Define Information Flows	271,272
274	**Define PMO & Project Documentation & Information Management Policies**	
275	Define Information Generation & Capture Procedures	273,299,302,3(
276	Establish Documentation Management Procedures	275,108
277	Define File Access Control Procedure	275
278	Define Document Version Control Procedure	275
279	Define Document Change Management Procedure	275

IPS Proprietary Information Page 5 Tue 6/26/01 5

Sample PMO & Program Mgt Proposal

ID	Task Name	Pred
280	Define Information Dissemination Policy	275
281	Define Document Archiving Procedure	275
282	PMO Operating Model Defined	276,277,278,27
283	**Establish Project Reporting Policies**	
284	Review Existing Processes, Procedures, Standards, Templates (Project Reporting)	256
285	Define Processes, Procedures, Standards (Project Reporting)	284,282,10
286	Produce Templates & Guidelines (Project Reporting)	285
287	Test Project Reporting Implementation	347SS,286
288	Approve Project Reporting Processes, Procedures, Standards, Templates & Guidelines	287
289	Communicate Project Reporting Processes, Procedures, Standards, Templates & Guidel	288
290	PMO Operating Model Piloted	289
291	**Setup PMO Infrastructure**	
292	**Identify PMO Location**	
293	Define Physical Space Requirements	297
294	Secure Physical Space	293
295	**Establish PMO Staffing**	
296	Define PMO Organization	259
297	Identify PMO Staffing Requirements	296
298	Engage PMO Staff	297
299	Define PMO Roles & Responsibilities	298
300	**Setup PMO Systems**	
301	Define Hardware Requirements	297
302	Acquire & Install Hardware	294,301
303	Define Software Requirements	297
304	Acquire & Install Software	294,303
305	Define Peripherals Requirements	297
306	Acquire & Install Peripherals	294,305
307	Define Telecomms Requirements	297
308	Acquire & Install Telecomms (Phone/Fax)	294,307
309	**Furnish PMO**	
310	Define Furniture Requirements	297
311	Acquire & Install Furniture	310,294
312	Acquire & Install Projection Screen	294
313	Acquire Shredder	294
314	Acquire Stationery	294
315	PMO Infrastructure Set Up	302,304,306,30
316	**Produce PMO Operations Manual**	
317	Document Project Initiation Operations	276,277,278,27
318	Document Project Definition & Organization Operations	317
319	Document Project Planning Operations	318
320	Document Project Execution Tracking & Reporting Operations	319,286
321	Document Project Closeout Operations	320
322	Consolidate Draft PMO Operations Manual	321
323	PMO Operations Manual Draft Complete	322
324	MD#4 Operationalized PMO Complete	290,315,282,32
325	**Operationally-Ready Library**	
326	MD#5 Operationally-Ready Library Begin	389
327	**Initiate the Library Program**	
328	Review Existing Documentation	326
329	Determine Other Requirements for Strategic Acceptability	328
330	Ensure Validation of Proposal & User Requirements	329
331	**Define & Organize the Library Program**	
332	Identify Sponsor, Program Manager & Core Team	330
333	Schedule Planning Workshop Session	332
334	Conduct Initial Plan Quality Review	333
335	Review Definition of the Program Parameters	334

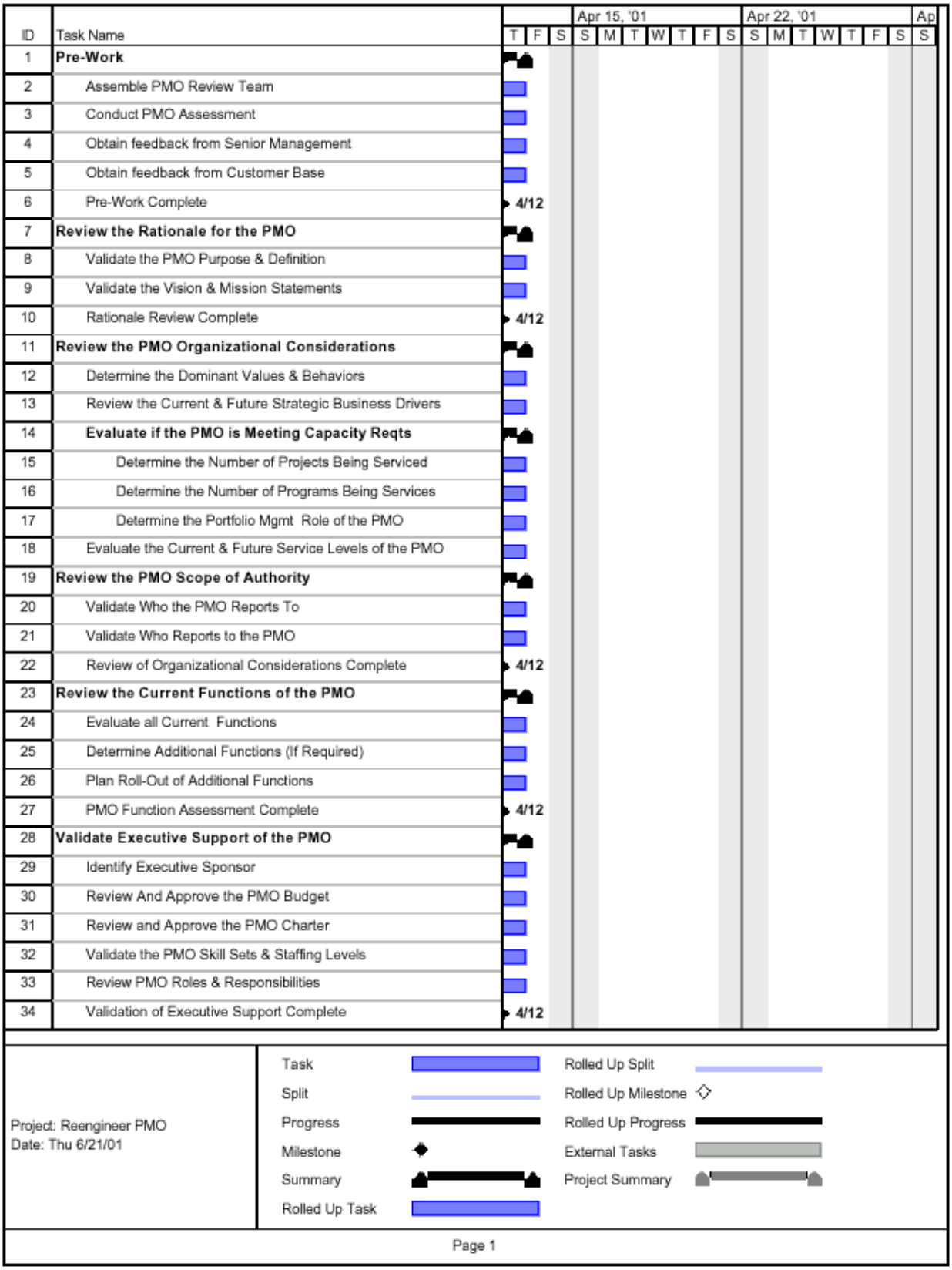
IPS Proprietary Information Page 6 Tue 6/26/01 6

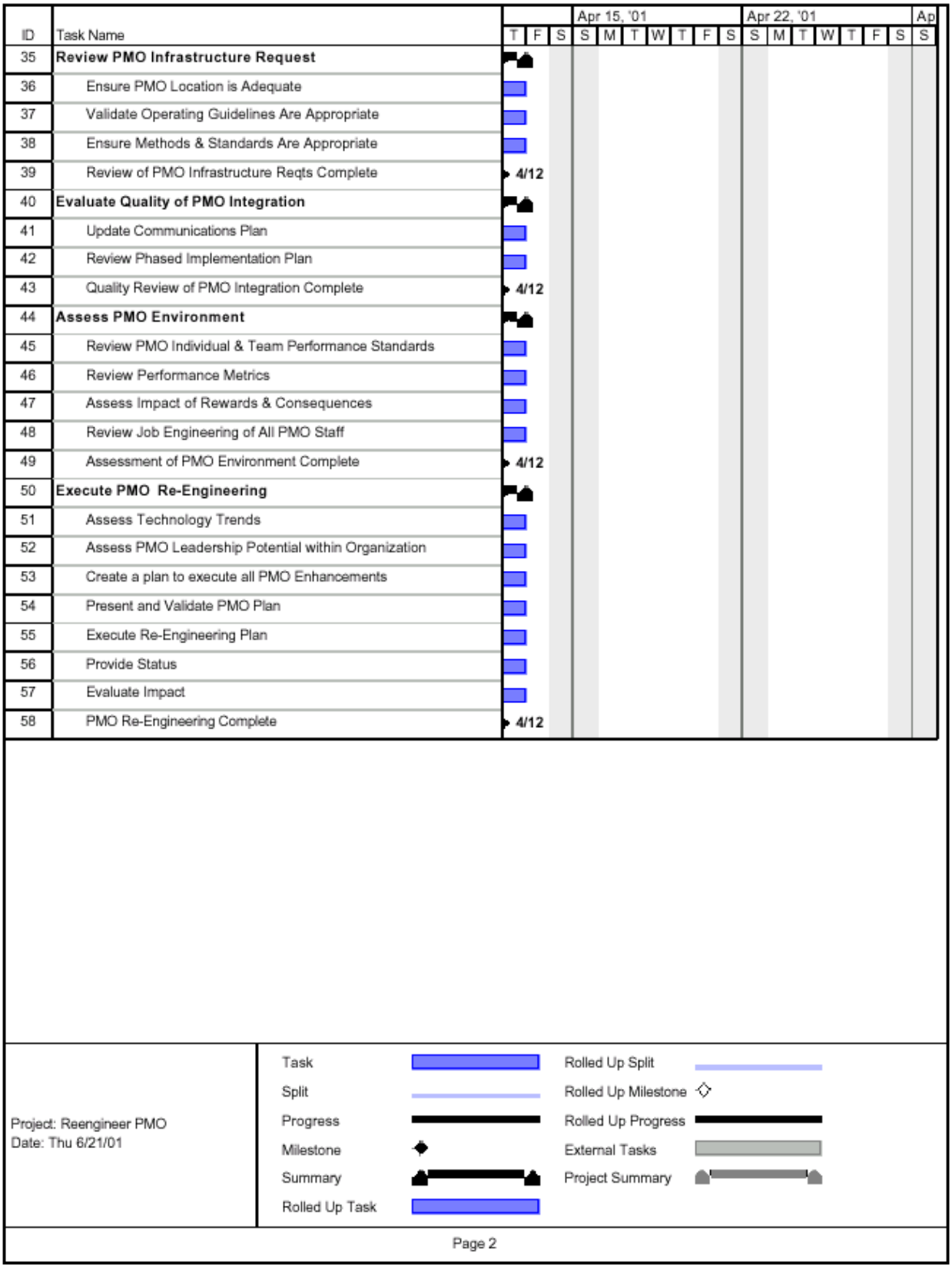
Sample PMO & Program Mgt Proposal

ID	Task Name	Pred
336	Review Definition of sub-Project Parameters	335
337	**Plan the Library Program**	
338	Facilitate pre-Planning Workshop Prep Session	336
339	Facilitate Detailed Planning Workshop	338
340	Validate Program Plan & Set Baseline	339
341	Ensure Change Management Processes Defined & Implemented	340
342	Library Program Plan Complete	341,340,357,3
343	**Track & Manage the Library Program**	
344	Facilitate Program Status Collection	342
345	Facilitate Human Resource Capacity/Demand Tracking	344SS
346	Facilitate Adaptive Action	344SS
347	Facilitate Provision of Timely Progress Reports	344SS
348	**Closeout the Library Program**	
349	Schedule Program Closeout Review	344,345,346,3
350	Conduct Program Closeout Review	349
351	Document Review Findings	350
352	Provide Recommendations for Process Improvement, Preventive and Corrective Actions	351
353	MD#5 Library Operationally-Ready	352
354	**Coached WRL Program Team**	
355	MD#6 Coached Program Team Begin	389
356	Provide pre-Program Process Overview to Program Team	355
357	Provide Process Coaching to Program Team	356
358	Provide Tools Coaching to Program Team	357
359	Familiarize Program Team with PMO Infrastructure Support	299
360	MD#6 Program Team Coached	356,357,358,3
361	**Feedback to MD#1, MD#2, MD#4**	
362	MD#7 Feedback Begin	128
363	Establish Process & Mechanism for Creation of Project-Oriented Rapid Learning Organization	362
364	**Conduct Program Reviews**	
365	Conduct 5 Formal Interim Program Reviews	347SS+5 days
366	Review Program Closeout Findings	352,365
367	Obtain Managerial Inputs on Proposed Actions and Improvements	366
368	**Create Improvement Rollout Plan**	
369	Determine Feasibility & Standardization Potential of Proposed Actions & Improvements	367
370	Prioritize Improvements to Methodology, PM System & PMO Operations	369
371	Develop Categorized Schedule of Actions and Improvements	370
372	Obtain Approval for Implementation of Program Closeout Review Recommendations	371
373	**Implement Improvements**	
374	Implement Process Improvements	128
375	Document Process Enhancements	374,372FF
376	Process Enhancements Complete	375
377	Implement PM System Enhancements	202
378	Document PM System Enhancements	377,372FF
379	PM System Enhancements Complete	378
380	Implement PMO Operations Improvements	324
381	Document PMO Operations Enhancements	380,372FF
382	Obtain Sign-Off of PMO Operations Manual	381
383	PMO Operations Manual Enhancements Complete	382
384	Communicate Changes & Rationale	375SS,378SS,3
385	MD#7 Feedback Complete	384,383,379,3
386	**Manage the Engagement**	
387	Refine & Optimize Engagement Plan	
388	Validate Engagement Plan	387
389	Set Engagement Plan Baseline	388
390	Collect Status	389
391	Analyze Variances	389

Sample PMO & Program Mgt Proposal

ID	Task Name	Pred
392	Plan & Take Adaptive Action	389
393	Report Status	389
394	Closeout Engagement	254,353,360,3


ID
Task Name
Apr 15, '01
Apr 22, '01
T F S S M T W T F S S M T W T F S S
1 Pre-Work
2 Assemble PMO Review Team
3 Conduct PMO Assessment
4 Obtain feedback from Senior Management
5 Obtain feedback from Customer Base
6 Pre-Work Complete 4/12
7 Review the Rationale for the PMO
8 Validate the PMO Purpose & Definition
9 Validate the Vision & Mission Statements
10 Rationale Review Complete 4/12
11 Review the PMO Organizational Considerations
12 Determine the Dominant Values & Behaviors
13 Review the Current & Future Strategic Business Drivers
14 Evaluate if the PMO is Meeting Capacity Reqts
15 Determine the Number of Projects Being Serviced
16 Determine the Number of Programs Being Services
17 Determine the Portfolio Mgmt Role of the PMO
18 Evaluate the Current & Future Service Levels of the PMO
19 Review the PMO Scope of Authority
20 Validate Who the PMO Reports To
21 Validate Who Reports to the PMO
22 Review of Organizational Considerations Complete 4/12
23 Review the Current Functions of the PMO
24 Evaluate all Current Functions
25 Determine Additional Functions (If Required)
26 Plan Roll-Out of Additional Functions
27 PMO Function Assessment Complete 4/12
28 Validate Executive Support of the PMO
29 Identify Executive Sponsor
30 Review And Approve the PMO Budget
31 Review and Approve the PMO Charter
32 Validate the PMO Skill Sets & Staffing Levels
33 Review PMO Roles & Responsibilities
34 Validation of Executive Support Complete 4/12
Project: Reengineer PMO
Date: Thu 6/21/01
Task
Split
Progress
Milestone
Summary
Rolled Up Task
Rolled Up Split
Rolled Up Milestone
Rolled Up Progress
External Tasks
Project Summary
Page 1


ID
Task Name
Apr 15, '01
Apr 22, '01
T F S S M T W T F S S M T W T F S S
35 Review PMO Infrastructure Request
36 Ensure PMO Location is Adequate
37 Validate Operating Guidelines Are Appropriate
38 Ensure Methods & Standards Are Appropriate
39 Review of PMO Infrastructure Reqts Complete 4/12
40 Evaluate Quality of PMO Integration
41 Update Communications Plan
42 Review Phased Implementation Plan
43 Quality Review of PMO Integration Complete 4/12
44 Assess PMO Environment
45 Review PMO Individual & Team Performance Standards
46 Review Performance Metrics
47 Assess Impact of Rewards & Consequences
48 Review Job Engineering of All PMO Staff
49 Assessment of PMO Environment Complete 4/12
50 Execute PMO Re-Engineering
51 Assess Technology Trends
52 Assess PMO Leadership Potential within Organization
53 Create a plan to execute all PMO Enhancements
54 Present and Validate PMO Plan
55 Execute Re-Engineering Plan
56 Provide Status
57 Evaluate Impact
58 PMO Re-Engineering Complete 4/12
Project: Reengineer PMO
Date: Thu 6/21/01
Task
Split
Progress
Milestone
Summary
Rolled Up Task
Rolled Up Split
Rolled Up Milestone
Rolled Up Progress
External Tasks
Project Summary
Page 2

Comprehensive List Of PMO Documents

There are many documents which are artifacts of PMO implementation. Not all of them may be required for your organization. Also, it is not usually practical to create all of them at the outset. However, the following comprehensive list will aid in planning for the sequence of their creation, and to ensure that none are overlooked in your planning.

PMO Documents List

Documents

Startup

- PMO Implementation Guide
- PMO Implementation Plan
- Implementation Schedule
- Deliverable/WBS Cross-Validation

Roadmap

- PMO Vision
- PMO Charter
- PMMA Report

Process

- Process Flowcharts
- Process Guides

People

- Terms of Reference
- Framework Checklist
- Skills Transfer Checklist (completion criteria)
- Skills Transfer Multi-Choice Test
- Coaching Log

Operations

- PMO Operations Guide
- Tracking Cycle

Portfolio Management

- MSP Portfolio Master
- PMT Charter
- PMT Framework Checklist
- Scoring Model
- Value Map

Tools

- System Requirements and Functional Specs
- MSP Knowledge Reference

Reports

- Dashboard
- Critical Path Gantt
- Critical Path Tracks Analysis
- Completed Tasks
- Next Priorities
- Data Confidence History

Communications

- Newsletter

Continuous Improvement

- Feedback Log

Templates

- Action Items
- Assumptions Log
- Change Log
- Change Request
- Communications Matrix
- Closeout Review
- Critical Path Report
- Dashboard
- Deliverable-WBS Cross-Validation
- Framework Checklist
- Interface Definition Form
- Interface Tracking Log
- Issues Log
- PDD
- Project Portfolio Status Spreadsheet
- Project Resource Information Request
- Risk Assessment
- Risk Management
- Scalable Projects Definitions
- Team Roster
- Tracking Cycle
- Tracking Update Form
- WBS Alternatives

Job Description for Program Manager

FROM: PMO Sponsor

SUBJECT: PMO Launch

Most of the great companies in the world are facing the same challenges we are—the challenge of increasing globalization, the need to find productivity improvements, increasing competition, and higher expectations from consumers. One of the most effective ways to respond to these challenges is to set up structural mechanisms to make sure our teams share best practices and lessons learned across all our portfolios.

It is with this thought in mind that I am establishing a Project Management Office. The purpose of this office is to provide a central project management focal point to identify and integrate project management's best practices/lessons learned around the world. I have asked Paulette Glinkowski to assume the leadership of the PMO, reporting directly to me.

We believe that the PMO will have many benefits, including:

- Improving the quality and consistency of global project management.
- Improving the partnering between project and functional management in order to facilitate more timely identification of issues and solutions.
- Improving the partnering between project teams and suppliers.

Working as part of my executive staff, her specific responsibilities will include:

- Management of the Project Gate Reviews (PGR) process to maximize the effectiveness of these peer reviews.
- Assistance with project portfolio management initiation of new projects. Specifically, Paulette will help us make sure we are maximizing the savings of replication and global leveraging strategies.
- Establishment and planning of regular project management retreats (like the first one this month!) to provide a central forum for dissemination of PM best practices and lessons learned. We expect this to be a great way to provide specialized training and professional development to our project managers.
- Facilitation of the project update process to promote a more standardized format and methodology across all portfolios.
- Establishment of a centralized PM point of contact for project and functional management to address company-wide issues and resolve conflicts.

Both Paulette and I are very excited about the potential of this position. Please join me in congratulating Paulette on her new role.

Program Manager

The program manager has primary responsibility for defining, planning, tracking and managing the project they are assigned. He/she is responsible for identifying key resources and providing the direction required to meet the program objectives. He/she is also responsible for ensuring appropriate management customer and supplier involvement throughout the life of the program.

Qualifications and skills of the program manager include an ability to lead and motivate people and encourage teamwork, an ability to communicate effectively with senior management, and a clear vision of what determines a successful solution for the customer and for the company. In addition, the program manager must have a technical background sufficient to understand the technologies and technical issues involved with the product, to be able to identify critical technical obstacles, and to make accurate technology decisions.

The program manager also must be able to manage program and project schedules and task details and utilize project management tools such as reports, tracking charts, checklists, and project scheduling software and to delegate appropriately.

A detailed list of the program manager's responsibilities and authorities is included below.

Program Manager Core Competencies

- Ability to integrate diverse program activities into a total system
- Technical expertise is less important than on simple projects
- Ability to manage relationships and people rather than the program work itself
- Understanding of matrix and project organizations and how to work within them
- Program Management process and management expertise

Program Manager's Role

- Overall coordination and integration of the program
- Define the program management process
- Develop and lead a cohesive team
- Provide a central focus for all planning activities
- Plan and manage the interfaces among projects
- Ability to plan and exercise scope integration
- Gain commitment from project managers to achieve the overall program objectives
- Ensure communication across projects
- Validate program plan with sponsor
- Facilitate reconciliation between program and functional management
- Ultimately responsible for meeting the program objectives (scope, schedule, resources)

PMO Personnel Interview Questions

One of the more difficult tasks in establishing a project management office is to staff it with competent personnel. This requires a high level of experience in project management as well as insight into behavioral models. There is no guarantee for success when dealing with such a subjective area. However, the following list of interview questions has proven helpful in past PMO staffing efforts.

Interview Questions:
Project Management Process

Introduction

The project management questions have been developed to ascertain the candidate's technical experience. Candidates need to be able to describe the formal processes they have used in defining, planning and managing their projects. They must be able to clearly articulate the benefits of project management. This is important to establish not only that they can actually perform the function, but they believe in what they are doing, and understand why it is valuable. Successful candidates will also be able to easily translate project management activities into direct positive impacts to other business processes.

The Core project management questions are based on the IPS model. They are arranged to provide initial calibration, probe deeper into the specific mechanics and techniques used, and obtain the candidate's general perspective on project management. The Supplemental questions address other aspects of project management and related business process experience. The focus in the interview is the core questions. Other questions may be used if time allows.

Core Questions

Initial Calibration

- Describe to me the largest project you ever worked on? What was your role in the project? How was it managed and planned? How did you communicate?
- How many different functional groups were involved? How many people?

Initiate/Define/Organize the Project

- How do you initiate and define your projects? What criteria do you use to define the boundaries of the project?
- How do you identify who you are working with on the project and their roles?
- How do you communicate?

Plan the Project

- How did you develop your project plans? Who was responsible for developing the plan?
- Give me an example how you use the Work Breakdown Structure on your projects? How did you develop it?
- Describe to me how you identify and define the relationships between tasks? Give me an example of how you plan for these relationships in your project?
- Give me an example of when your project plan did not meet management objectives? Describe to me how you handled that situation?
- What is meant by the critical path in a project plan? How is it determined? Why do PM Tools use a 2-pass calculation process?
- Describe how negative float can occur in a schedule. What can you do as a project manager to recover from this situation?
- How did you manage resource utilization on your project? What types of resources did you track? What tools or reports did you use?
- What is Leveling? How does it work? Why is it used?
- Have you ever developed risk management plans? What type of information was contained in these plans? What did you do with the risk management data after you collected it?

Track/Manage the Project

- Describe how you collect and report status on your projects? What is the frequency of status collection? How did you stay informed and keep others informed?
- Did you hold project status meetings? Who was responsible for those meetings? Describe how they were structured (agenda, action item tracking etc.). Who attended these meetings?
- How did you manage scope changes to your projects?
- How do you perform variance analysis on your project? What impact does this have?

Close Out the Project

- Have you ever facilitated a post-mortem or Project Review? Describe how you did it? What were the results?

Project Management Perspective

- How did you become a project manager? How do you see the job of project manager? What do you like about it? Dislike?
- What makes you a successful project manager?
- Describe your most difficult situation as a project manager.
- What are the benefits of Project Management to your organization?

Supplemental Questions

Project Management Overview

- For projects that you consider were quite complex, what factors were present on these projects that made them particularly complex? How did you manage these complexities?
- How does Project Management fit into current management philosophy of Fast-Time-To-Market?
- Are you familiar with Product Lifecycles? Please describe a Product Lifecycle you have used. How does Project Management fit in with this lifecycle?
- From your experience, would there be any differences managing the following two projects? What would those differences be?

  1. A new product introduction involving new technology

  115898024. A product maintenance release or feature enhancement of an existing product.

Technical Project Management Concepts

- When estimating the duration of tasks, where did you get the data for how long it would take to do something? What about for projects that involved new technology, process, or team members?
- What is a deliverable? What is a milestone? How are these two terms different? What selection criteria do you use to determine if a milestone is needed in your plan?
- Have you ever set a project baseline? What is it? How did it help you?
- What type of measurements did you collect to better manage your projects? How did you use these measurements?

Other Processes Related to Project Management

- Have you had any formal training in Process Re-engineering, Quality? Classes? Degrees? Certificates?
- How did you determine the effectiveness of your projects? Were they under-budget, ahead of schedule, etc.? How did you know?
- Are you familiar with any of the following: ISO 900x, SEI? How do you apply their concepts to your daily work?
- Can you describe what is meant by a maturity map? Do you know where your projects have been in relation to the map?
- Good Project Management is a combination of process methodology and organizational cultural shift. What techniques did you use to ensure that the PM processes were being used effectively within your organization?

Qualification Guidelines

PMO Center Of Excellence
Telephone Interview Qualifications Guidelines

The following qualification guidelines are taken from the skill ladder for a senior project manager. Only a small portion of new hires will be Senior Project Managers. It is not expected that a viable candidate must have all these skills. In fact, most will not. This list is intended to be used a reminder of the types of skills we are looking for.

- Demonstrated experience in project management, preferably in the brokerage or financial services industry including knowledge of operations.
- Experience in managing IT or IT related projects. (REQUIRED)
- Experience managing multiple large, complex, and cross functional projects, with an emphasis on systems, technologies, business process redesign and/or impact to field and customer service. (DESIRED)
- Knowledge of mainframe and client/server environments, personal workstations applications, development tools, and/or applications testing
- Training and experience in a full system development lifecycle methodology
- Demonstrated willingness and ability to learn about the functions and operations of any new systems that are developed to assist in solving operational problems
- Strong understanding of and/or experience with requirements development, user and non-user acceptance testing processes and tasks and ability to deliver associated work on a timely basis.
- Demonstrated ability to develop the project plan (including identification of detailed scope, schedule, assumptions, trade-offs and risks), financial impact and investment opportunity.
- Knowledge of organizational procedures & policies, products & services.
- Excellent oral and written communication skills.
- Ability to effectively communicate to all levels of management.
- Strong interpersonal, analytical, problem solving, negotiating, influencing, facilitation, organizational, prioritization, decision-making, and conflict resolution skills.
- Demonstrated ability to delegate project tasks as needed and monitor multiple projects.
- Demonstrated ability to motivate staff/project team, inspire teamwork, and take leadership.
- Demonstrated ability to gather, interpret, and present complex data.
- Demonstrated ability to take the initiative when faced with a new or challenging situation.
- Demonstrated ability to gain consensus through mediation.
- Demonstrated ability to adjust from detailed to strategic view.
- Demonstrated ability to find creative and innovative solutions to issues.
- Has working knowledge and experience with MS Project or similar scheduling software
- Ability to develop complex project schedules and reports.

- Demonstrated ability to work in ambiguous, fast-paced, continually evolving work environments.

How Can We Help Form

This is an example of how a cyber-arian could assist project and program teams with their research needs.

How can we help?	
What are you looking for?	
Describe your group or project so we understand the context of your research needs	• • • •
Indicate all the ways this information will be utilized	__ Resolve a specific question or issue __ Provide the team with an overview __ Offer a comprehensive analysis __ Pinpoint other case histories __ Facilitate new thinking __ Identify necessary skills or resources
Ideal form & format of information	__ Presentations __ Articles __ Synopsis __ Report from another project __ Name of SME __ Names of those familiar with this work
How will you use this information?	
What benefits will this information provide the task owner, the team,and/or the overall organization?	

Technology Planning Framework Checklist

When any new technology is being considered for implementation in conjunction with project management in general or specifically with a PMO, there is a set of fundamental questions which should be answered. The following checklist provides a minimum set of those questions.

The Technology Planning Framework

- □ How does the proposed technology meet the organization's needs?
- Business needs
- Mastery needs
- User needs
- □ How would the proposed technology promote and support best practices?
- □ What specific efficiency or productivity gains can be expected?
- Collaboration
- Execution
- Resources
- □ How would the proposed tool enable individuals and teams to perform their tasks better?
- □ How do you access, maintain, and analyze:
- Data
- Information
- Knowledge
- Wisdom
- □ What implementation support should we seek?
- Systems integration
- Customization
- Scalability
- Security
- □ How will this technology enable us to generate additional revenue or ideas?

Tool Talk Matrix

It is often very difficult to know where to start in the screening and selection of project management tools to be used in an organization. The following matrix of tools is provided as a starting point in your search for tools. It is not intended to be a comprehensive list of PM tools but as a sample of the types of tools available.

"Tool Talk"

Category	Titles	Current State	Trend
Scheduling Tools	MS Project, AUTOPlan, PS Scheduler	♦ Main tool of choice ♦ Often mis-used/under-utilized ♦ Focus on scheduling	♦ Add collaborative capabilities ♦ Automate routine tasks (i.e., auto-reminders of tasks due) ♦ Differentiate power user from individual contributors
Vertical Applications	The IT Project Management System (IT), aimware (for software developers), SquareWorks (IT), OnlinePM.com (Construction)	♦ Used in conjunction with scheduling tools (usually MS Project) ♦ Requires investment in integrating with business process	♦ More specialization ♦ Inclusion of more templates ♦ "Turn key" for vertical markets
Specialty Tools	Risk Radar (freeware), Project Manger's Toolkit, Critical Tools	♦ Used in conjunction with scheduling tools (usually MS Project) ♦ Provide value-add through templates, guidelines, or specialization	♦ Conversion to web-based solutions ♦ Possible inclusion as part of MS Project ASP

Simulation/Modeling Tools	Vite, MetaSoftware, Kismet Analytic	♦ Uses minimum of project data to model what will happen with key milestones and resource utilization ♦ Facilitates optimizing the schedule, scope and resources	♦ Advanced integration with other systems (i.e., ERPs and CRMs) ♦ Inclusion of optimizing strategies and context-sensitive coaching
Enterprise Project Management Tools	Welcom, ePM, eSynerProject.com	♦ Emerging market with no proven value-add (current research study underway at PMI) ♦ Focuses on, "How can we make this business more adaptive, responsive, and thus more profitable in a rapidly changing, multi-project ♦ environment?" ♦ Implementations highly reliant upon stakeholders and very analogous to a SAP implementation ♦ More geared to highly process-oriented organizations in highly stable industries	♦ Greater integration of process and projects ♦ Will promote philosophy and practice of "MOBP" (Managing Organizations by Projects) ♦ Integration with other enterprise systems

Collaborative Tools	eRoom, Webex, Placeware	♦ Promote collaboration among team members ♦ Create virtual "visibility room" that can be designed for each project or program's needs ♦ Can hold virtual meetings with ability to chat while reviewing key project information via a browser	♦ Addition of video-conferencing and streaming in the virtual workplace ♦ Translation capabilities
"Fusion" Tools	Infinos, ProCarta, Arch Street Software	♦ Provide project management and extensions of PM in one tool (i.e., process modeling, intellectual capital management, knowledge management, enterprise-wide planning)	♦ Inclusion of tools as special applications in ERP or more "mainstream" tools ♦ ASP model

Organizational Mastery of Project Management Excellence

Project Office Practice					
Attributes	**Project Management Office (PMO) Center of Excellence**	**Process Design & Implementation**	**Program Support Office**	**Project Support Office**	**Portfolio Management Office**
Key Organizational Demands					
Typical Functions					
Entity Supported	Corporation or Business Unit		Specific Program	Specific Project	Business Unit
Ideal Level of Sponsorship					
Value Proposition					
Timeframe	On-Going	Short-Term	Program Length	Project Length	On-Going
# of Projects					
Staffing					

Attributes	Project Management Office (PMO) Center of Excellence	Process Design & Implementation	Program Support Office	Project Support Office	Portfolio Management Office
Benefits					
Risks					
Others?					



Project Planning Matrices

Version 1.0

Using the Matrices
These two matrices are to be used as part of the process for determining the appropriate level of project planning for a particular project. Generally, these tools will be applicable for chunks of work that have a beginning and an end – not for on-going, continuing, day-to-day activities. The matrices are designed to be used and improved for an environment with the following characteristics:

- Distributed teams with members in many locations
- Speed is of the essence.
- Requirements evolve and often change frequently.
- Team members may be new to the company, project management, and working in teams

Matrix A – Project Assessment Criteria

- Initial project lead reviews each of these characteristics to determine if they apply for the proposed project, circling the answer that best applies.
- When finished, determine which Project Tier has the most circled characteristics.
- Use this to determine from Matrix B what level of detail and planning is required.

Matrix B - Project Planning & Management Guide

- Use the results from applying Matrix A to the proposed project.
- Review the required items for the selected tier.
- Use judgment and experience to adjust as needed.

Matrix A - Project Assessment Criteria

Project Characteristics for Determining Level of Project Planning Required	Level of Overall Project Planning Complexity Tier 1	Tier 2	Tier 3
Level of Risk	**Low**	**Medium**	**High**
Strategic importance	**Low**	**Medium**	**High**
Customer-facing	**No**	**Yes, at low level**	**Yes, at high level**
Complexity	**Low**	**Medium**	**High**
# People involved	**<5**	**5 - 8**	**>7**
# External Resources involved	**0**	**1 - 2**	**>2**
# Physical locations involved	**1 - 2**	**2 - 3**	**>3**
# Interfaces with other parts of the organization	**Low**	**Medium**	**High**
Importance of speed to execution	**Low**	**Medium**	**High**
Estimated $$ involved	**<$25k**	**$25k - $75k**	**>$75k - $100k**
Estimated length	**<3 months**	**>3 months**	**> 6 months**
Involves technologies new to the organization	**No**	**Yes**	**Yes**
Involves technologies new to the team	**No**	**Yes**	**Yes**
Scope / requirements definition	**High**	**Medium**	**Low**
Level of Upward Management Interfaces	**Director / Manager**	**VP - SVP**	**SVP - CEO**
Sponsor Level	**Director / Manager**	**VP - SVP**	**SVP - CEO**
% of Project Manager's Time Required to manage project itself	**Very low**	**Medium**	**High**
Tier Selection			

NOTE: **This is not an averaging exercise. If "Strategic Importance" is HIGH, and the "Speed of Execution" is HIGH, then the project may need to be managed as a Tier 3 project.**

Matrix B - Project Planning & Management Guide

	Level of Overall Project Complexity		
Project Planning Component	Tier 1 • Duration <3 months • Few involved • Quickly planned • No key inter-dependencies	Tier 2 • Duration > 3 months • Medium level of importance & complexity • Few inter-dependencies	Tier 3 • Duration >6 months • Critical business impact • Large resource use • Many inter-dependencies • New technology
Project Planning Sessions	**1 day**	**2 days**	**3 days**
Planning Session Facilitator	**Project Manager or Team Lead with facilitation skills**	**Resource External to the Project**	**Resource External to the Project**
Toolkit Used	**GO-Project Toolkit**	**Full Project Toolkit**	**Full Project Toolkit**
Project Definition Document (PDD)	✔ **(Minimal)**	✔	✔
Project Rationale: • POS (Project Objective Statement) • Key Assumptions • Flexibility Matrix • Key Business Drivers	✔	✔	✔
Success Criteria	**Brief**	**Moderate detail**	**Detailed**
Project Team Roster	✔	✔	✔
Major Deliverables • Brief Description • Is / Is Not Chart	✔	✔	✔
Risk Assessment	**One-page**	**Detailed**	**Detailed**
Risk Management Plan	**One-page**	**Detailed**	**Detailed**
MS Project Schedule	**Minimal, high-level**	**Moderate detail**	**Detailed**
Task Detail	**Low**	**Medium**	**High**
Tracking Level	**Summary Task**	**Detailed task**	**Detailed task**
Status / Feedback Reporting	**Verbal, face-to-face**	**Formal but flexible**	**Formal but flexible**

	Level of Overall Project Complexity		
Project Planning Component	Tier 1 • Duration <3 months • Few involved • Quickly planned • No key inter-dependencies	Tier 2 • Duration > 3 months • Medium level of importance & complexity • Few inter-dependencies	Tier 3 • Duration >6 months • Critical business impact • Large resource use • Many inter-dependencies • New technology
Key Dependencies - Outside the Project	✔	✔	✔
Issues Log	✔	✔	✔
Decisions Log	✔	✔	✔
Project Notebook	✔	✔	✔
Project Web Space	**Usually none**	✔	✔