



PMO Tooling

TIPS, TRICKS & THINGS TO CONSIDER

Resourcing

*What are people doing?
Are they fully occupied?
What scope is there to do more?
What skillsets do we have?
What do we need to deliver the Portfolio of work?*

Dependencies

*Are these visible and understood?
Are they being effectively managed?*

Governance

*Does work have the required approvals?
Is it flowing through the process or are there bottlenecks?
Are Boards and Steering Groups operating effectively?*



Financials

*How are we performing against budget?
Do we need to accrue for anything material?
Where are the bottlenecks in the approvals workflow?*

Risk

*Are these being escalated and appropriately dealt with?
Is management coordinated between the Portfolio and the Organisation/Enterprise (added/removed as projects deliver)*

Roadmap

*What's on the work stack, what can be accommodated, is it on time/going to be ready when needed?
Can the various business areas cope with the amount of change proposed at any given time?*

“

TOOLS DON'T FIX
EVERYTHING - IF
ANYTHING, THEY
MAGNIFY THE
PROBLEMS YOU
ALREADY HAVE

”

Ask some honest questions...

- Are you clear about the PMO purpose or mandate *within your organisation?*
- Do you understand the existing pain points *across the community?*
- Are you prepared to overhaul ALL existing processes & people within the PMO?
- Are the PMO ready to perform the required System Administration and Second Line Support roles?

Don't look at *any* PPM tools until these questions have been answered!

“


CLOUD MANAGEMENT
STRATEGIES ARE
CURRENTLY FOUND IN
ONLY 10% OF
ORGANISATIONS

”

Over 50% of companies are yet to start developing a Cloud Management Strategy

- Gartner Research suggests that organisations should anticipate needing **MULTIPLE TOOLS**
- *On average between 4 and 6 solutions are deployed across an organisation*
- Organisations should also anticipate overlap between tools

Does ***your*** organisation have the ability to manage the needs of each solution?



**CAN
YOU
HANDLE
THIS?**

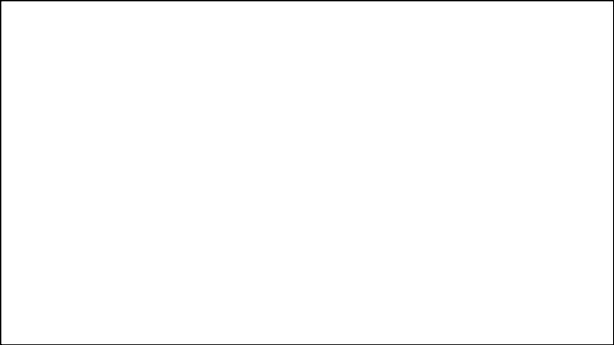
A solution-centric or SaaS strategy has 7 key functional areas...

- Identity Management
- Cloud Access Security Brokering
- Service Brokering
- Application Performance Monitoring
- Orchestration & Management
- Integration
- Business Process Management



Who do I need to talk to in my organisation...

- Enterprise Architect
- Information Security
- Service Management
- Application Management
- Solutions Architect
- Business Analyst
- Project Manager



“

THIS IS
BIGGER THAN
JUST THE
PMO

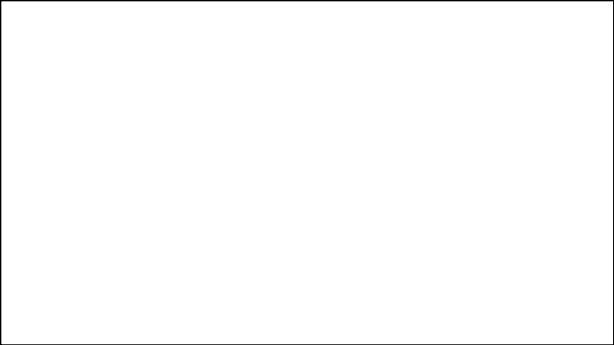
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*Implementing a PPM solution is a **Business Transformation** activity & needs to be managed accordingly...*

Change Management practices will help to address:

- Employee resistance to change
- Management behaviours not supporting the change
- Lack of adequate resource

Communicate, listen, observe



*“It’s not **your** PMO!”*

Mark Price Perry

Be clear about why the **organisation** is going down this route;
PMO objectives are *secondary*



"We need to let the contractors go – what impact will this have on the change portfolio?"

"We have agreed to merge with another company; we need to add the integration into the workstack now & its not negotiable"

"Tell me when everything will be done by & how much it will cost – and I will hold you to those numbers"

*"The strategy has changed – I need this project delivered as top priority & I don't want to stop anything else or find more money.
Tell me why you don't think that's possible?"*

"What are all these people I'm employing actually doing?!"


At any given time - how are we performing against budget?



*Will the senior leadership team be able to catch me out?
Will they ask me more awkward questions?*

“How much earache will I get from the PMs as they are forced to change the ways they work AGAIN?!”

“Will implementing this tool to help PMO distract my PMs from doing their jobs?”



“Will this enable me to get the resources I need, when I need them?”

Will I get more earache from my programme / portfolio manager now that s/he can see everything I’m doing?

I don’t work that way, why should I change?

More work for me, more policing from the PMO; let me just deliver!

“If I agree to keep things updated, will this stop PMO asking me to fill in forms/templates with information that’s already in the system?”

“Will this stop PMO asking for something new every week?!”



"I've used this tool before & it didn't work"

Will I still have a job?

"What does this mean for the existing services & processes we operate?"

Senior Stakeholders

These people will generally not be touching the tool & probably won't even require access

These are the people that need to buy into the concept of "another tool", and understand the WIIFM (what's in it for me); they want to know costs (of entry and ongoing), time & resources required to setup, high level benefits eg. having your questions answered more quickly, what-if scenarios for the portfolio, increasing productivity. They also want to know how changes in the portfolio impact Finances, HR & Operational Risk.

They don't care how the PMO gets to the answers, they just want them quickly & to be able to rely on them.

This is where lots of PMOs go wrong when trying to get senior buy in; they don't care how much time & effort it might save YOU, they want to know what they will be gaining from their investment.

Programme / Portfolio Leaders

Unlikely to complete any training but will become frustrated quickly when the system "doesn't work"

They want as little involvement as possible with anything related to how things are done, just to a) be able to answer the questions that senior management ask them in the lift/hallway about how things are going, b) fulfil their roles as escalation points for RAID items, c) talk in meetings with confidence about portfolio or programme dependencies in a wider context.

They will generally be unlikely to get hands on in the tool, except to maybe run their favourite reports once a week which give them all of the above; a lot of what they do will be remote when they have time travelling or between meetings.

Project Managers

PMs don't generally like tools - it takes away their ability to manage the flow of information (i.e. hide). Typically they become more receptive when they believe that this WILL save them time/reduce bureaucracy/get decisions made quicker. They really dislike having to spend time training, waiting for a system to synchronise or losing data that has been entered.

I find it VERY difficult to stop project managers from continuing to rely on emails, especially if they are out of the office/in meetings.

PMO

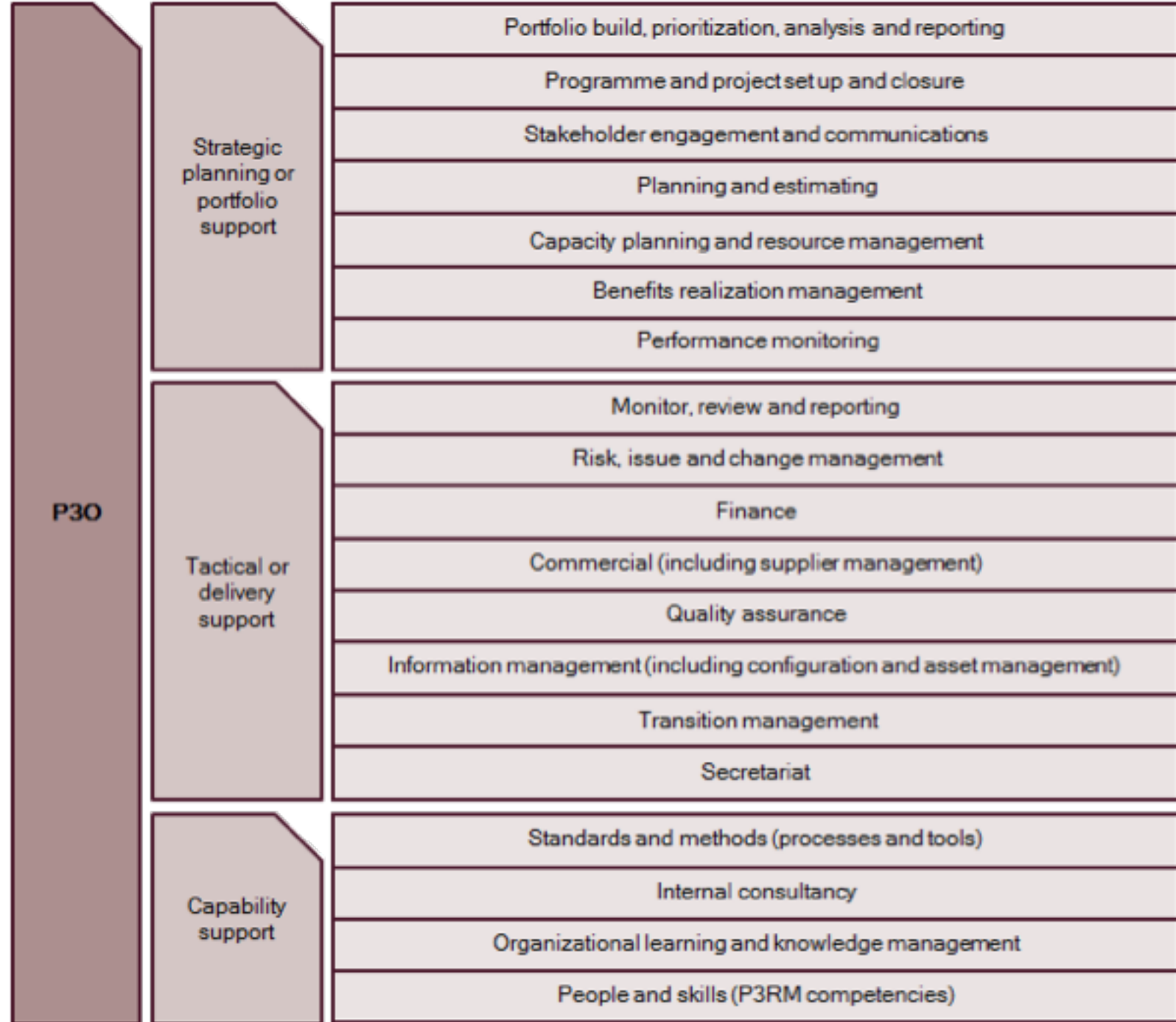
Some embrace the commitment required to administer a tool effectively - dealing with users queries, training to use the system to its full potential - and some resist, especially if they have come from a more administrative or operational background.

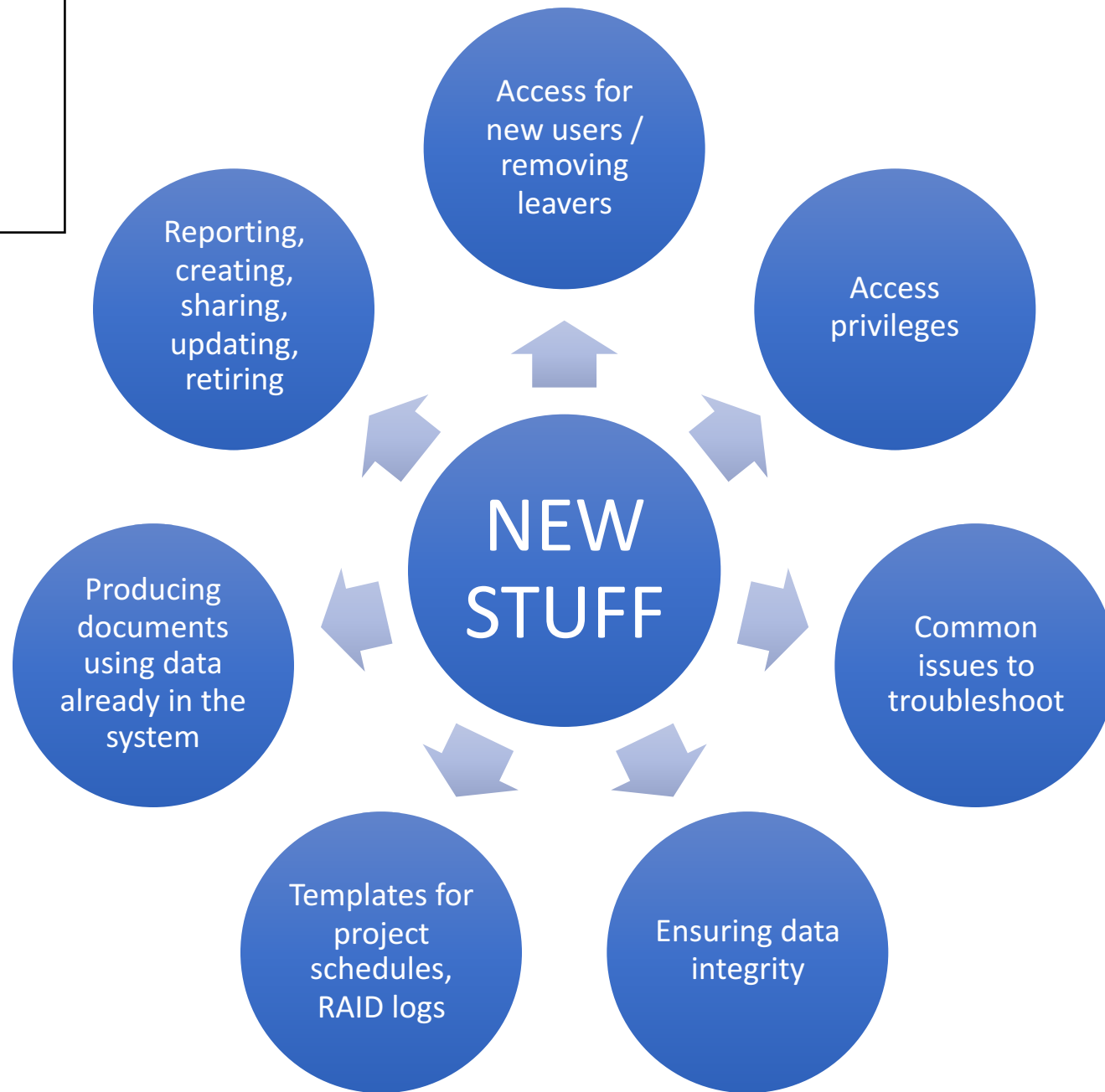
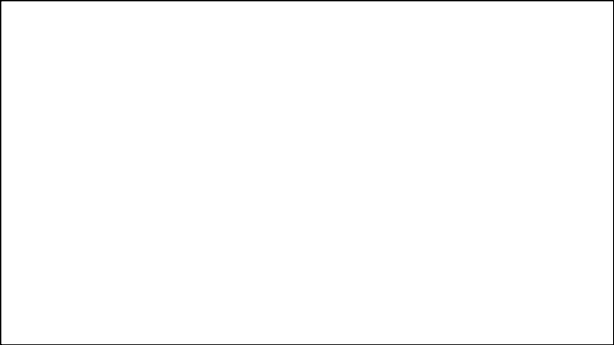
Developing the Business Case

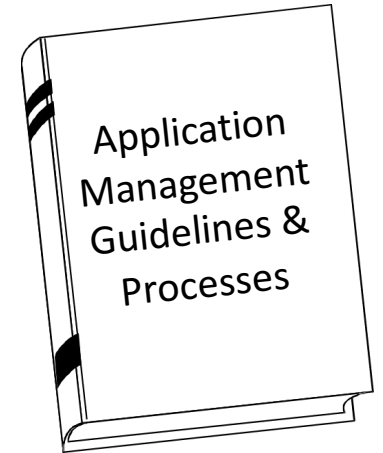
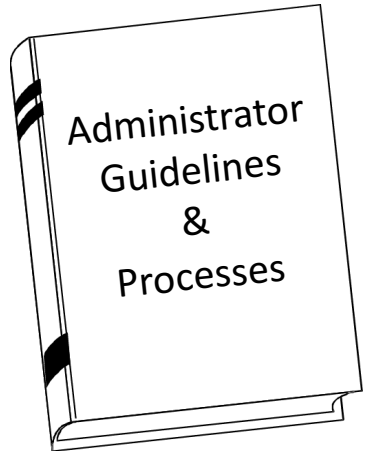
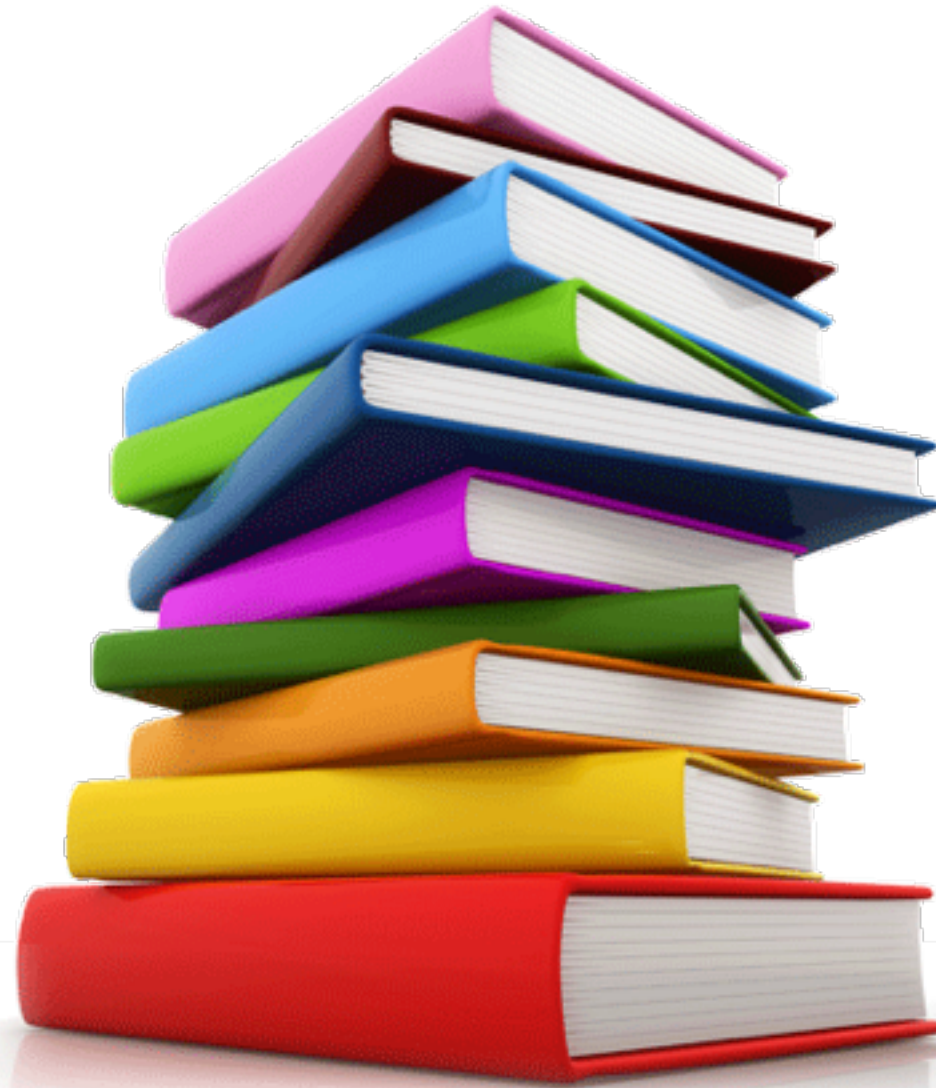
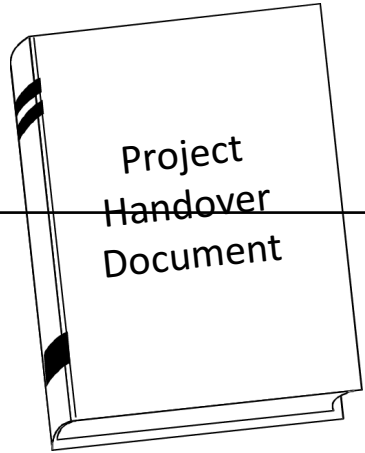
- Who is the sponsor? Are they senior enough in the organisation?
- Will roles and/or headcount be impacted?
- What are the true costs of ownership, including ongoing costs for licensing, support, scaling user numbers?
- What are the Operational impacts?
- What is the “Do Nothing” option?
- What will success look like?
- How will it be measured?

*Think about
desired
outcomes &
services...*

*What will
success look
like?*







Example Contents page for Project Handover Document...

prepared by Business Analyst

1 INTRODUCTION

2 RELEASE OUTLINE

- 2.1 Overview
- 2.2 Release Window
- 2.3 Scope

3 SUPPORTING PARTIES

- 3.2 Business Owners
- 3.3 1st Level Support
- 3.4 2nd Level Support
- 3.5 Super User/Administrators
- 3.6 Service Delivery
- 3.7 Any other internal teams that support the project
- 3.8 Vendor (including contact details)

4 SERVICE DESK IMPACT ASSESSMENT

- 4.1 Support Process Overview

5 POTENTIAL QUESTIONS TO SERVICE DESK AND ANSWERS

6 ROLL BACK PLAN

7 RISKS

8 POLICIES AND PROCEDURES

9 SERVICE DELIVERY

- 9.1 Service Delivery
- 9.2 Service Recharge Model
- 9.3 Application Licences
- 9.4 Solution Availability
- 9.5 Vendor Rebates
- 9.6 Vendor Service Delivery Meetings
- 9.7 Ending Contract Early
- 9.8 Contract Renewal
- 9.9 Environments
- 9.10 Web Browser Support
 - 9.10.1 Withdrawing Support for Browser
 - 9.10.2 Current Browser Support
- 9.11 Security
 - 9.11.1 Security Governance
 - 9.11.2 Certifications & Registrations
 - 9.11.3 Password Standards
- 9.12 Business Continuity
- 9.13 Application Security

9.14 Vendor Data Centres

- 9.14.1 Location
- 9.14.2 Data Centre Security: Physical
- 9.14.3 Data Centre Environments
- 9.14.4 Data Centre Networks
- 9.14.5 Change of Data Centres
- 9.14.6 Monitoring
- 9.14.7 System Backup
- 9.14.8 Data Security
- 9.14.9 Disaster Recovery

10 SUPPORT MODEL

- 10.1 Incident Notification
- 10.2 Incident Severity Classification
- 10.3 Target Response and Resolution Times
- 10.4 Escalation Procedure and Bug fix process
- 10.5 Vendor Maintenance
- 10.6 Scope of Support

11 PERFORMANCE MEASURES

12 FUTURE ROADMAP SUPPORT MODEL

Example Contents page for Administrator Guidelines & Processes...

prepared by PMO

- 1 INTRODUCTION
- 2 TRAINING FOR ADMINISTRATOR
 - PMO defining as part of the starters & leavers process & on boarding training process.
- 3 ADMINISTRATOR SUPPORT ROLE OVERVIEW
 - 3.1 Outline
 - 3.2 Support Model Process Flow
 - 3.3 Scope
 - 3.4 Supplier Management
- 4 ADMINISTRATION: USERS AND PROJECTS
 - 4.2 Access Levels - Setup area > Access Levels
 - 4.3 Contact Details: Technical support down/ Bug reporting
 - 4.4 User Set Up
 - 4.5 Okta Backout/Outage Plan
 - 4.6 Project Set Up
 - 4.7 Reports
 - 4.8 Templates & Custom Forms:
 - 4.9 Project Dashboard
 - 4.10 RAID Log Changes
 - 4.11 Public Holidays / Schedule Set up / User Time Off
 - 4.12 Status Reporting –Steps for PMO to run Status reports:
 - 4.13 Scorecards process:
 - 4.14 Approvals:
 - 4.15 Timesheet:
 - 4.16 Baselines:
 - 4.17 Queue Set-up:
 - 4.18
 - 4.19
 - 4.20 FAQ:
 - 4.21 Sandbox 1 Environment Refresh:

DO...

- ✓ Prioritise requirements carefully & get stakeholder buy in; *what's top of YOUR list may not be what's top of THEIRS*
- ✓ Understand how each solution fits together; *some functionality may have to be introduced in a certain order to make others work*
- ✓ Be realistic about how long & how much effort things will take; *going live is just one milestone & arguably the easiest part!*

DON'T...

- ✓ Do ANYTHING without executive buy in, a business case & a good understanding of the key drivers for change
- ✓ Ask your friends what THEY are using & then choose that solution
- ✓ Look at the latest industry reports & start calling vendors for demonstrations
- ✓ Underestimate!

Don't Forget...

- ✓ Standards, policies, governance & SLAs
- ✓ Service-based processes
- ✓ Service request management
- ✓ Monitoring & metering
- ✓ Business continuity & disaster recovery

These are Vendor & Organisational based considerations

Top Tips...

- Run your PPM implementation project using the tool – *NO EXCEPTIONS!*
- Find a friendly project manager or two to run a pilot with; *act on their feedback*
- Set deadlines & stick to them; *user login, project migration, first status reporting*
- Publish & regularly update FAQs; *SharePoint or other internal site*
- Run a weekly “Lunch & Learn” forum for at least 6 weeks after Go Live; *informal training refreshers & feedback loops*

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THE EXTENT TO
WHICH THE
TRANSFORMATION
SATISFIES THE NEED
FOR WHICH IT WAS
UNDERTAKEN

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Any Questions?



#pmoflashmob



GrowthThroughKnowledge.com



Nicole Reilly



@GrowthKnowledge