

## **PMO SIG March 2016 Meeting Summary**

### **Introductions**

SIG attendees introduced themselves, with brief summary of PM experience and background.

### **Presentation: Project Administration**

**Presenter: Ed Mahler**

#### **Reference to January Chapter Meeting**

- Ed referenced the January 2016 chapter meeting, where John Jagtiani presented “Portfolio Management & PMOs of the Future”
  - ♦ Copies of the presentation were provided for the SIG members to review
  - ♦ Presentation pdf is available on our chapter web site [here](#)
- PMO Portfolio Management definition (from page 2 of presentation)
  - ♦ “Aligns with organizational strategies by selecting the right programs or projects, prioritizing the work, and providing the needed resources. It balances conflicting demands between programs and projects, allocates resources based on organizational priorities and capacity, and manages so as to achieve the benefits identified.”

#### **Alternative PMO view presented by Ed**

- PMO is not the deciding body, executive management is
- PMO should be supporting the PMs, but most do it poorly
- Understanding and appreciation of PMOs is weak

#### **External vs. Internal Project Management**

- Companies that provide project management to customers
  - ♦ Revenue from project management demonstrates the value delivered
- Companies that manage projects internally, for their own business
  - ♦ Revenue is from products sold
  - ♦ PMO value is never clearly demonstrated; PMO can be very inefficient

#### **PMO Serving Administrative Role**

- PMO performs the scheduling and reporting
  - ♦ Relieves PM of this burden, allows PM to focus on the project itself
  - ♦ Uniformity and integrity of scheduling and reporting are achieved
- PMO relationship to PM is supporting versus enforcing

#### **PAI PMO Presentation**

- Full presentation from Ed Mahler is appended below

### **Next Meeting**

Next meeting is in April.



## PMO SIG Discussion Topics to Consider

### Proposed Topics (items in bold are recent suggestions)

1. PMO Practice
  - a. **Types of Charters**
  - b. **Using BAs in PMO Models**
  - c. PMO Resources - Templates, Websites, etc.
  - d. PMO Governance and Portfolios
  
2. PMO Promotion
  - a. Looking at the PMO from the Outside
  - b. PMO Promotion in the Academic World
  - c. Promoting the value of the PMO
  - d. Explaining the benefits of the PMO
  - e. **How to attract PMs to a PMO**
  
3. Organizing and Starting the PMO
  - a. Defining the Role of the PMO
  - b. Supporting Organizational Decisions
  - c. The PMO and Cross Organizational Matrix Management
  - d. Lifecycle of a PMO, how to start one and pitfalls at different stages of the lifecycle
  - e. Where should the PMO be migrated into with a company that re-organizes, downsizes?
  - f. Criteria to establish a PMO in your organization - When does it NOT make sense to have a PMO?
  - g. Should the PMO be in-sourced or out-sourced? Why?
  
4. Other
  - a. PMO Practices vs. Upper Management
  - b. Client Cultures
  - c. Model PMO Job Descriptions (Maude Fribourg has sample, find others)
  - d. Keeping PMOs Active
  - e. PMO – Current and Future
  - f. PMO Myths
  - g. **Value of the PMBOK**
  - h. **Relevance of PMO in the future**

Attending: Adella Rosenthal, Charles R. Cante, Ed Mahler, Howard Paul, Jason Fox, John Grazier, Louis Noto, Marlo Moss, Richard Loeb

March 8, 2016  
8:15 – 9:15 PM

Chair: Richard Loeb, PMP  
*Richard.Loeb@verizon.net*

Scribe: Jason Fox, PMP  
*jpjfox@gmail.com*

# PAI PMO

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# Current PMO Philosophy

- 160112 PMOs\_of\_the\_Future.pdf
  - Define methodology
  - Train PM's in methodology
  - Develop & manage project policies, procedures, templates, & other shared documentation
  - Monitors compliance
  - Tracks metrics
  - Communication
  - Project portfolio management (PPM)
  - Strategic driver

# Companies that do contract projects

- Must be efficient and profitable or out of business
- Construction, large scale mfg, oil & gas, mining
- Their project management philosophy
  - Hire experienced PM's, train via apprenticeship
  - PMO provides PM support services (scheduling, reporting, legal, purchasing, accounting)
  - Don't join PMI

# Companies that do projects for themselves

- Can afford inefficient projects because their revenue is from their product and services sales
- I/T, finance, product development....
- Result: Poor PM practices
- Hires inexperienced PMs, relies on training and process definition and monitoring
- No PM support services

# The PAI PMO

- Hires experienced PM's, trains via apprenticeship
- PMO provides PM support services (scheduling, reporting, legal, purchasing, accounting....)
- Joins PMI to tell others

# Scheduling philosophy

Executive : Secretary = PM : Scheduler

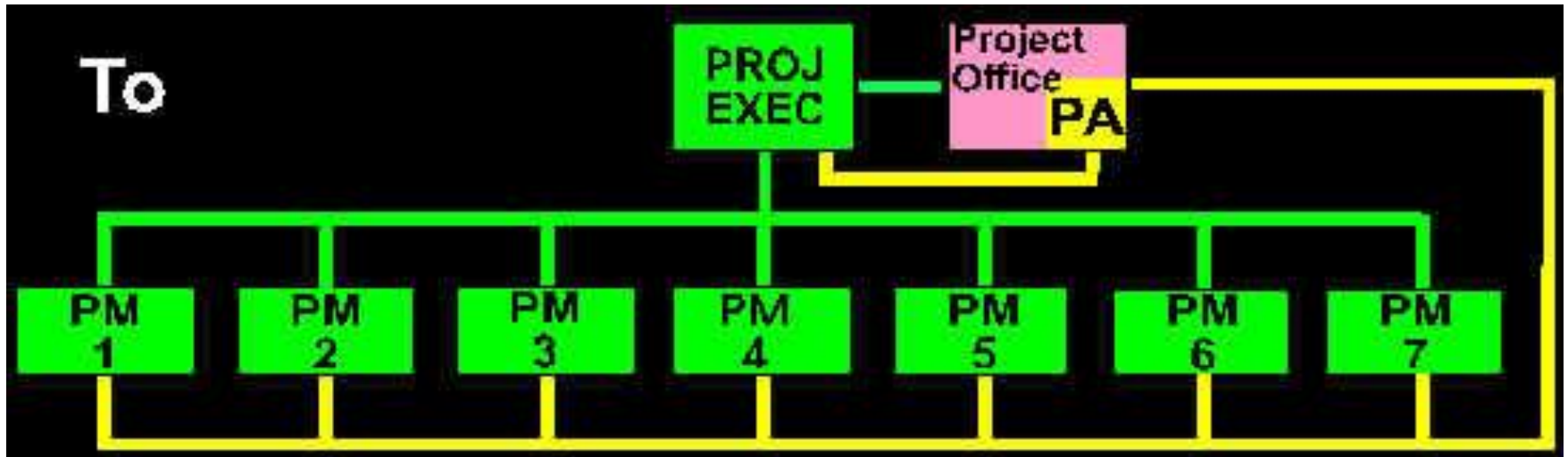
- Executive > content, logic, message, objectives
- Secretary > tool skills, structure, appearance, grammar, spelling, storage
- PM > content, logic, message, objectives
- Scheduler > tool skills, structure, appearance, grammar, spelling, storage
- Difference: Cross project view
  - Resource balancing
  - Cross project dependency resolution
  - Portfolio reporting



# Reporting structure

- Scheduler should reside in the project office
- Report to project executive
- Supports project managers
- Project manager responsible for schedule content
- Scheduler responsible for schedule integrity
- Both responsible for reporting

# Reporting structure



# Benefits of a Scheduling Service

- 1. Fewer tool licenses and less tool training is required when a Scheduler supports multiple project teams.**
- 2. Project managers and team members are freed from the need to become project management tool experts and can concentrate full time on managing their projects. Tool licenses and training for project managers can be eliminated.**
- 3. In large and multi-project environments a Scheduler ensures that planning and reporting are consistent in format and terminology and conform to organization standards thus eliminating the need to provide training and enforce compliance.**
- 4. The Scheduler provides a single a focal point for executives to understand their portfolio status, eliminates the need for a project office person to provide that roll up function.**

# Benefits of a Scheduling Service

- 5. Higher quality planning, tracking, and reporting because the Scheduler works with the project management tool full time compared to the project manager who would use it no more than 10% to 15% of their time.**
- 6. New project managers become effective more quickly because the Scheduler can help them begin their planning, tracking, and reporting immediately. Without the Scheduler Service a new project manager would require training in the use of the tool and the organization's usage standards and then take months to become proficient.**
- 7. In large and multi-project environments the Scheduler provides cross plan and cross organization dependency resolution and resource loading reconciliation.**

# Benefits of a Scheduling Service

- 8. Slippage information is less likely to be filtered by the project team's incentive to only report good news, thus improving early warning of missed targets.**
- 9. Scheduler mentoring will improve the performance of inexperienced project managers.**
- 10. A Scheduler can provide a project executive with valuable project management guidance. For example, ensuring that plans contain the information needed to provide early warning of slippage, or that reports are frequent enough to allow remedial action before its too late.**