The PMO and You

FACILITATE  ■  SUPPORT  ■  DELIVER
The PMO is a Service Organization

Project Management is a Team Sport
Who are we...

- Stu Benoff, Sr. Project Lead
- Steve Schwarz, Sr. Project Lead
- Dave Tarampi, Sr. Project Lead
- Deborah Sartin, Director
What we do...
PMO Managed Projects as of 4/1/16

1. NGSS – Steve/TBD
2. Nursing Website Redesign - Stu
3. Penn Vet Electronic Medical Records – Stu
4. InfoSec Firewall - Dave
5. InfoSec Attribution - Dave
6. Planview Implementation Evaluation – Deborah
7. O365 – support Stacey
# Progress Management Office (PMO)

**Mission:** Facilitate project and process excellence.

**Vision:** Serve as a Center of Excellence for project and process management.

### Progress Management Office Services

<table>
<thead>
<tr>
<th>Project Management Delivery</th>
<th>Project Management Consulting</th>
<th>Training &amp; Professional Development</th>
<th>Program Management</th>
<th>Process &amp; Planning Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide scalable project methodologies, toolkits, forums, and full service PM Delivery.</td>
<td>Support others in the project management role via expert consultation and support from experienced project managers.</td>
<td>Provide training and development opportunities for those interested in advance knowledge of project management skills, tools, and techniques.</td>
<td>Manage key enterprise systems and applications as programs including product and service roadmaps, metrics and reporting.</td>
<td>Deliver business process improvement services and planning support to increase efficiency and simplify transactions for projects.</td>
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</table>
Definitions

**Projects**
Delivers a new service, process and/or product. It is temporary in nature and has a defined start and end. Requires the use of a project manager and project sponsor, project management lifecycle and project management processes.

**Operations**
Ongoing, recurring activities such as services that support the day to day work including application maintenance and the handling of events, incidents and service requests.

**Processes**
Structured, repeatable tasks that produce a specific product or service to support operational activities.

**Programs**
A set of multiple, related projects that are directed toward the same strategic, business or organizational objective. Creates benefits beyond those that would have been realized had they been implemented individually.

**Service Request**
Operational work that is larger than an incident and smaller than a project requires multiple resources, scheduling and coordination.
"One ISC "

Service Delivery Model
### Work Management Matrix (POP Chart)

**Communication Tool for:**
- Prioritization
- Resource Allocation
- Capacity Planning
- Effort Reporting
- Service Efficiency

<table>
<thead>
<tr>
<th>Priority</th>
<th>Processess</th>
<th>Type</th>
<th>Percent: %</th>
<th>Priority</th>
<th>Operations</th>
<th>Percent: %</th>
<th>Priority</th>
<th>Projects</th>
<th>Percent: %</th>
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<td>1</td>
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<td>1</td>
<td>PMU (PM Support)</td>
<td>Veterinary (102)</td>
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<td>Penn Vet Electronic Medical Records</td>
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<td>Lite Project Process</td>
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<td>Project Hq (Project Discovery/102)</td>
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<td>Nursing Website Redesign</td>
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<td>Professional Development</td>
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<td>PHE (Planning &amp; Implementation Evaluation)</td>
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<td>Admin</td>
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<td>4</td>
<td>Admin</td>
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<td>PACT (Administrative Computing Tools)</td>
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<td>PPM System Implementation</td>
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</table>
Project & Portfolio Management (PPM)

Demand Management by the Governance Teams
“Do the right projects”
- Align, Select
- Funding, Approval, Prioritization
- Resource Allocation, Capacity Planning, Reporting

Portfolio Management

Delivery Management by Project Managers
“Do the projects right”
- Propose, Define
- Plan, Manage
- Close

Project Management
Project Portfolio Management (PPM) Process
For Enterprise & Mid-Level Projects

Project Management Process

1. Propose *
   A project is proposed using the Portfolio Management listserv (isc@lists.upenn.edu). The Portfolio Manager works with the requester on a new Project Request.

2. Select*
   Project Request goes through the selection process with the Project Operating Committee. Project classification score may be updated.

3. Define *
   Once selected, PM and client work together on a Project Charter.

4. Approve
   Project Charter is considered for approval via the governance process. Once approved, project is prioritized for placement on the master project list.

5. Plan*
   The PM and client finalize the Project Plan.

6. Authorize*
   Formal authorization to start project is given.

7. Manage*
   Project is being managed.

8. Review*
   Progress and status are being monitored.

Close

Client gives final acceptance that project is concluded satisfactorily.

* Align with fiscal year budget planning

Portfolio Management Process
Smaller, shorter projects can follow a “fast track” process.

* Rollover for more information
Lite/Do It Yourself - Project Management Process

Define & Plan

Close

Manage
## Project Sizing Matrix

<table>
<thead>
<tr>
<th>Work Type</th>
<th>Project Attributes</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Service Request or Activity</strong></td>
<td>Hours &amp; Dollar Threshold</td>
<td>Duration</td>
</tr>
<tr>
<td></td>
<td>$ = 160 hours and $ = 500 hours; Less than $ = 15,000</td>
<td>&gt; 1 Month or &lt; 3 Months</td>
</tr>
<tr>
<td></td>
<td>$ = 501 hours and $ = 1,000 hours; $ = 15,001 and $ = 110,000</td>
<td>&gt; 3 Month or &lt; 6 Months</td>
</tr>
<tr>
<td><strong>Project - Lite</strong></td>
<td>$ = 1,001 hours and $ = 2,000 hours; $ = 110,001 and $ = 320,000</td>
<td>&gt; 6 Months or &lt; 1 year</td>
</tr>
<tr>
<td><strong>Project - Mid-Level</strong></td>
<td>$ = 2,001 hours; $ = 320,001</td>
<td>&gt; 1 year</td>
</tr>
<tr>
<td><strong>Project - Enterprise</strong></td>
<td>More than 1 project associated to a single initiative; $ = 2,001 hours; $ = 320,001</td>
<td>Multiple Years</td>
</tr>
</tbody>
</table>

*Cost exclusive of labor*
PPM Tool Solution

Enterprise

- Innotas
- Eclipse
- ServiceNow
- Workfront (AtTask)
- Project Online Project Server
- Planview

Lite

- MS Planner
- Teamwork
- Project.net
- Kanbanchi
- Smartsheet
- Project Lite
- Projectplace
- Workfront (AtTask)
How PMAP works

PMAP is divided into four phases: Project Definition, Project Planning, Project Execution and Project Close-out. Each PMAP phase includes a number of activities that involve deliverables. Some activities (such as certain kinds of reporting) continue throughout all four phases, whereas others are unique to an individual phase. The heart of PMAP is phased approval. The project sponsors and/or owners approve the project phase by phase as additional information becomes available.

PMAP specifies roles and responsibilities for achieving a project. A project manager leads the working group that accomplishes the project. The project manager is responsible to project sponsors and/or project owners, who govern the project. The project team may include a client (functional) group as well as a technical group.

ISC initially developed PMAP for large-scale projects; however, PMAP components, such as phased project approval, project governance, and management checklists, can be incorporated into the management of all projects large or small. PMAP is designed to be scalable and it can be applied to projects with durations as short as three months or as long as several years.

Feel free to send questions about using PMAP to: pmaphelp@lists.upenn.edu.

Phases

- **Phased approach.** The heart of PMAP is phased approval of projects.
- **Definition Phase:** The primary purpose of the Definition Phase is to prepare a proper response to a work request and to obtain project approval and funding if the response includes a recommendation to launch the project.
- **Planning Phase:** The purpose of the Planning Phase is to refine the project scope, identify and sequence the tasks necessary to produce all the deliverables, estimate the effort involved, define resource needs and costs for the remainder of the project, establish project commitments for variance tracking purposes, and develop other plans necessary for successful project execution (such as plans for communicating project progress, tracking deliverable approval, and managing project commitment changes).
- **Execution Phase:** The purpose of the Execution Phase is to develop, implement and transition the product of the project to the organization that will operate and maintain it.
- **Close-out Phase:** The purpose of the Close-out Phase is to consolidate lessons learned and best practices that can be applied to other projects and to conclude the project.
- **A note about iterations:** Iteration is acknowledged within PMAP as a creative fact.
Coming soon....
Training & Professional Development

- Project Management 101 – Lite
- Project Management 201 - Enterprise
- Lunch & Learn
- Project Academy
- Skill Builders
The Objective

Clear * Concise * Consistent
The Results

✓ Transparent
✓ Accountable
✓ Achievable
✓ Measureable
Performance Improvement Maturity Levels

Level 1: Initial
- Ad hoc processes, inconsistent outcomes, unpredictable and reactive

Level 2: Repeatable
- Repeatable processes, defined practices, reduce rework

Level 3: Standardized
- Predictable processes, consistent outcomes, automation of processes

Level 4: Measureable
- Stable processes, performance metrics, productivity growth, and proactive

Level 5: Optimizing
- Continuous process improvement, knowledge management, and innovation

Short Term
- We are here

Long Term
- via a Benefits Realization Framework
PMO Roadmap

Phase 1.0

2015 – 2018 – Short Term
Run - Level 1 to 2

Phase 2.0

2018 -2021 – Mid Term
Grow - Level 2 to 3

Phase 3.0

2021 - 2025 – Long Term
Transform – Level 3 to 5

Penn Compact 2020
Phase 1.0
- Manage Current Projects
- Review and Conduct PMO Staffing
- Provide Immediate Project Consultation
- P4
  - POP Charts
  - Project Partners
  - Define & Evaluate Lite Project Process & Toolkit
  - Implement Lite Project Process & Toolkit
  - Project Xchange
  - Lunch and Learn Sessions
  - Project Jam on 4/27 at 11am 3600 Market
  - Project Management 101 Class - Lite
  - Open House

Phase 2.0
- P4
  - Define & Evaluate Mid/Enterprise Project Process & Toolkit
  - Implement Mid/Enterprise Project Process & Toolkit
  - Web Updates
  - Create Project Management 201 Class – Mid/Enterprise

Phase 3.0
- P4
  - Process Mgt.
  - Planning & Productivity
  - Skill Builders
  - Project Academy
  - Blogs

Phase 4.0
- P4
  - Program Management
The approach for the PMO implementation will be:

- **Client focused**: partnering with the organization to find the best solutions;

- **Phased**: implemented in stages that are flexible and in sync with the organization’s readiness;

- **Holistic**: incorporating all work activities to determine prioritization, resource allocation, and capacity planning while being scalable and sustainable;

- **Systematic**: introduce simple techniques, processes and tools in an orderly fashion;

- **Measureable**: focused on continuous quality improvement.
Questions?