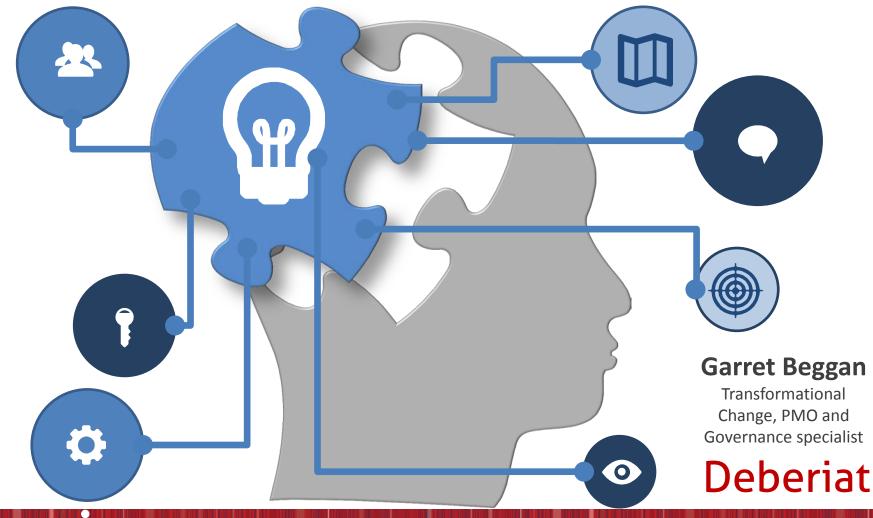
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The Learning PMO Garret Beggan Deberiat



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What use is thinking 'outside the box'...



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I used to think "can we just concentrate on finding people who can think inside the box?" – it seemed simple enough to me at a project scale, but plenty of people weren't doing it.



15 years ago, every other job ad was looking for people to 'think outside the box' Now many organisations are working at a programme or portfolio scale and there's a lot more to think about inside a bigger box. Even the best PMOs are missing chunks of it.

Operational focus

It's a also lot harder to retain focus on today's in-flight programmes and at the same time work out what's a priority to improve now, or what's OK now but will need upgrading next year.

.. if we haven't really mastered 'inside the box'?

So how can we get a 'learning PMO' off the ground?

We can start where we are and build a continuous improvement loop into the way we work. This is an approach that uses common sense and its main tools are things that many PMOs already do to some extent.



Start where you are (Where else can you start from anyway?)

This approach is most practical to the PMO acting as CoE. But since I developed it in an operational PMO, I think any PMO that will live through several projects should be able to do something along these lines.

The PMO as CoE Centre of Excellence for Portfolio, programme and/or project management

I'm going to describe using four powerful techniques to develop and improve the framework, one reactive and three proactive.

If we are to make continuous improvement 'real', we need to know what concrete thing we are going to make better. I'm going to share a framework of key items I have found give a comprehensive foundation Thinking Tools Create your own PMO 'ideas toolkit'



Keep it real Continuous improvement of what?

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Lessons Learned: the 'anti-party' drudgery you have to do to be allowed the REAL party)

Afterwards who remembers either of them?

Hands up who has ever started a project or programme by digging out other people's lessons learned?

Let's look in detail at turning 'lessons learned' into 'lessons applied'

Remember, often only the PMO is going to live through project after project in the same organisation, so we are the ones who can make a difference! Turning 'lessons learned' into 'lessons applied'

1st Reactive Technique

Harnessing Lessons Learned

The 3 useful places to turn 'Lessons Learned' into 'Lessons Applied'

Methodology Lifecycle & key deliverables **Gateways** The right people asking the right time The right questions at the right questions at the right people asking the right the right the right the right the right the right questions at the right que Lessons Applied Add an explicit section to key documents

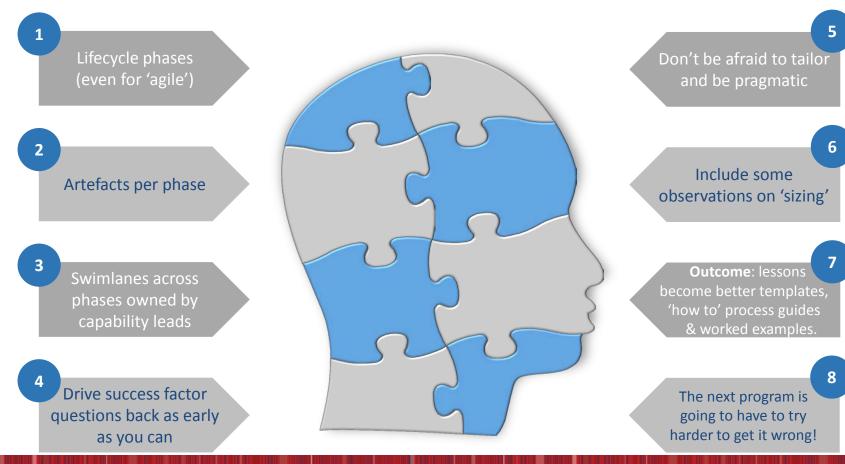
Methodology: make it very hard for people to miss something or do the wrong thing by updating templates, 'how to' guides and worked examples

Gateways: have the right person ask the right question, and share why the answer is important. The responses need to be evidenced (right artefact, right assurance, right standard)



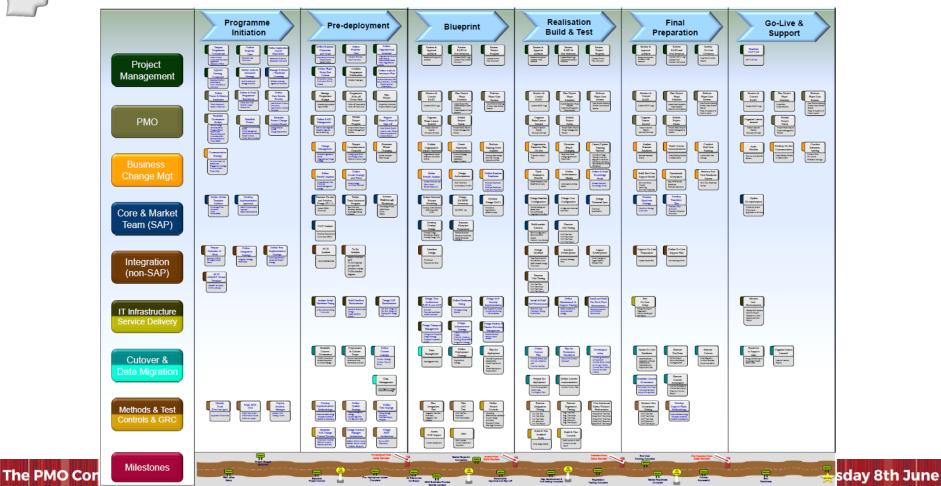
Choose 1 key document per lifecycle phase and update the template with a 'lessons applied' section where the PM describes how he/ she is going to avoid bad thing/ repeat the good thing learned

A closer look at Methodology...



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Methodology guide 'real life' example



Artefact catalogue 'real life' example

										JLF	R Centra	l IT Tear	m										JLR S/	AP Prog	rammes
Project Phase	Artefact Name	Document Type	t Artefact Type ID	Artefact Description (Purpose and Composition)	Acceptance Criteria	Warranty Phase 0	warranty Phase 1	Warranty Comments	JLR Business	Central PMO	IT Services	Integration center	MIS Management systems	Process Management	Steering	Committee Programme	Programme	PMO	Project Manager	JLR Solution JLR Solution Architect Data Migration I and	Commerical	Head of Technical	Head of Change	Head of Solution Head of Data	Management
Project Initiation	Statement of Work (SoW)		PM004	A statement of work (SOW) is a formal	SOW should clearly define Purpose	Yes										х	x								
Project Initiation	Initial Proposal Document		PM003	The request describes the needed item(s) and all	The document correctly represets the project in	Yes										х	x		с		с				
Project Initiation	MSA (Master Service Level agreement)		PM005	Master Service Level	Commerial agreement to	Review	~									x	x								
Project Initiation	Letter of Intent (LoI)		PM001	An acknowledgement		N/A																			
Project Initiation	Request for Proposal Document		PM002	RFP by JLR to SI partner		N/A										A	с		R						
Project Initiation	Business Case		BCM001	The business case		Yes									R	x	с						Α		
Project Preparation	Project Scope Document		PM102	consists of the financial Document detailing the scope of the project	Project objectives are documented	Yes									3	< x			х	х			с		с
Project Preparation	Project Charter		PM104	scope of the project Document detailing what the project is about, how		Yes									R	I	A/R	1	R				с		с
Project Preparation	Programme/Project Team Organisational Model		PM0115	the project is about, how Organisation structure of TURBO team members		Yes									R		х		AR				R		
Project Preparation	Programme/Project Roles & Responsibilities		PMO101	This deliverable	RACI matrix for project defined - based on ASAP	Yes									R		х	R	AR				с		
Project Preparation	Programme Governance Model (applicable for TURBO and eSMART)		PMO108	documents the roles and Document listing TURBO governance bodies: scope		Review & Re-	-								R		с	AR							
Project Preparation	Non-SAP Tools Document		QM101	Covered by tool specific requirement documents & Document describing	***If SolutionManager and ALM are implemented	Reviev & Re-	*								R										R
Project Preparation	IT Savings Model / Targets		РМ	Cost/Benefits if SAP is		N/A																			
Project Preparation	Issue, Risk and Escalation Management Process	Process	PMO106	Plan detailing Escalation process to be followed Document describing the		Reviev & Re-									R			AR							
Project Preparation	Infrastructure Cost Plan		TSI102	Document describing the cost of infrastructure for A high plan detailing the		N/A																			
Project Preparation	High Level Project Plan		PMO102	A high plan detailing the milestones, timelines and	For the entire project, a dvnamic Schedule has	Yes											х	s	R	R			R	1	R
Project Preparation	Business Change Methodology					N/A												Т							
Project Preparation	Business Change Management Strategy	Strategy	BCM103	Document detailing the Change Management	The plants are clear on the way in which the	Reviev & Re-	w yes								R				с						
Project Preparation	Solution Composer E2E Process		SD102	The SAP Solution Composer is an offline PC		N/A																			
Project Preparation	Workstream Plans (for each phase as per requirement)		SD106	Schedule of tasks – it includes definition of the Document detailing the	As per JLR Planning Standards	Yes									R			s	х	Α					
Project Preparation	Vendor Management Strategy		PM107	approach that will be Document detailing the		Yes									R		Α		R				R	1	R
Project Preparation	TOR - Opertational Steering Committee meeting (OSC)		PM105	terms of reference.		Yes									R	(R						
Project Preparation	ToR – Executive Steering Committee		PMO100	Defines the role of the executive steering		Reviev & Re-	<u> </u>								R	(s	AR						
Project Preparation	Tools Assessment & Report (Applicable for any new tool)		QM125	Assessing the best tools to be used with the SAP		N/A											_								R
Project Preparation	Target Operating Model Diagram			The purpose of test's	The Testing Strategy and	Yes												Т							
Project Preparation	Test Strategy	Strategy	QM110	The purpose of testing strategy is to develop the	The Testing Strategy and Approach must cover	Reviev & Re-	<u></u>												с						AR
Project Preparation	Test Resource Planning Spreadsheet.xls		QM116	The quality register is a	A procedure is in place	N/A																			
Project Preparation	Quality Register		QM106	The quality register is a diary of the quality events.	A procedure is in place that will ensure that every	Yes									R				R						
Project Preparation	Quality Measurement Framework		QM108	Quality Management along	Quality Management Plan	N/A Rovio																			
Project Preparation	Quality Management Plan	Standard	QM102	documents the processes	Quality Management Plan The document clearly	Review & Re-											с	c	с						
roject Proparation	Quality Catoway Roview Form		PM0104	This review form is used	Not a customer	Vor									D			AP							

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Ensure gateway questions responses are:

• evidenced by artefacts

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• Meeting pre-declared standards

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• Verified by the right people

A closer look at Gateways...

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Again be ready to size and customise appropriately. The owners of capability

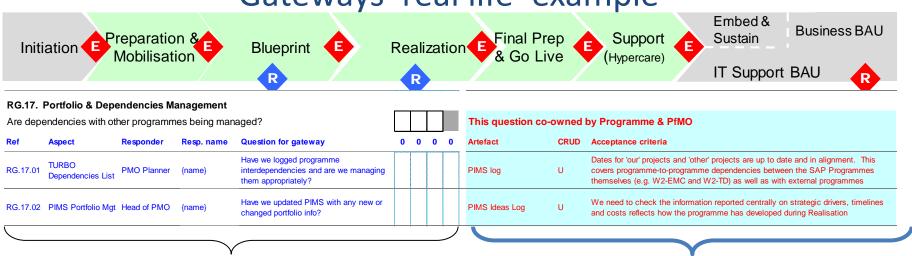
swimlanes are best placed to decide what artefacts are to be presented evidence and what standard they must reach

- The PMO's role is to create the 'big tent' and pull these parties in.
- We can't ourselves hope to be the experts in everything, but we can be the 'go to' group to facilitate integration.



Outcome: pointed gateway questions and the attendance of specialists who 'own' capability swimlanes make it harder to carry a 'root cause of failure' through the gate into the next phase.

Gateways 'real life' example



'Substantive' columns

- Aspect being considered
- Role responding to the question
- Person responding to the question
- Specific sub-question to be answered

'Guidance' columns

- Define artefact to be used in evidence
- CRUD –whether artefact is created, read, updated or deleted for the gate event
- Acceptance criteria define what success should look like for this artefact.

A closer look at PM's response section in key documents*...

Identify one document per program or project phase which is key to the next phase. E.g. a Design document at the end of Design phase is key to 'Build & Test' phase.

Add a 'Lessons Applied' section to that document's template. In it, the PM must address the lessons learned by previous projects from the next phase we're about to go into.

Set a review question to look at the PM's response in the phase gateway. Has the PM adequately explained how he/ she is going to avoid the 'bad thing' or repeat the 'good thing'?

Be realistic

I don't advise more than 10 lessons to address per phase. And as these points are addressed over time by Methodology or Gateway changes, remove them from the list the PM must address and replace them with the next improvement lesson bubbling up

*BTW, I am indebted to the 'Managing Benefits' guidance for this idea

Case study: controls in a manufacturing company



- Design inadequate
- Testing inadequate
- Controls inadequate



- Swimlane: business risk added as a separate topic
- Methodology: controls artefacts and 'good enough' standards set
- Gateway: questions about reviewing redacted versions of earlier IA reports

Harnessing organisational energy: pulling IA inside the 'big tent' Outcome: stronger controls scrutiny and better IA findings

From reactive to proactive...

1. Scan the horizon

When the CEO says "we need to focus more on process" or "we need better controls", can the PMO get on the front foot?

2. Conduct a pre-mortem Imagine yourself at the end or the project, and that it wasn't a success. What went wrong? If you had your time again, what would you change?

3. Build Communities of Practice What would happen if the PMs could suggest improvements? The data team? The Business users?

Link it all together drive improvements from all sources into our 3 key tools: methodology,

...Three powerful techniques for the learning PMO



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