The PMO Conference London 2018



The PMO Lifecycle The Balanced PMO Using Maturity Models &

Dashboards to Track and Report Strategic and Project Value



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Experience







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The PMO Conference London 2018

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PMO Symposium[®]

SAN DIEGO, CA, USA

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PROJECT SUMMIT BUSINESS ANALYST WORLD

Author





AT&T





Project Management Institute

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Management.com

Project



HOW TO BUILD, RUN AND SHUT DOWN A PMO

PMO 2018 Conference Classes

12TH JUNE 2018 \\ LONDON

Agenda

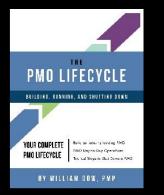
- Problem / Solution Statement
- BPMO Project Trade-Off
- BPMO Maturity Models
- BPMO Telemetry
- Putting it All Together

Takeaways

Learn how to use maturity models and dashboards to track and report strategic and projected value

Understanding of how to make smarter project trade-off decisions

Understanding of PMO Maturity Models PMO Reports and Dashboards



An autographed copy of my latest book

"The PMO Lifecycle, Building, Running and Shutting Down"

Problem...

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Root Cause...

Project Managers are drawn to the Iron Triangle...

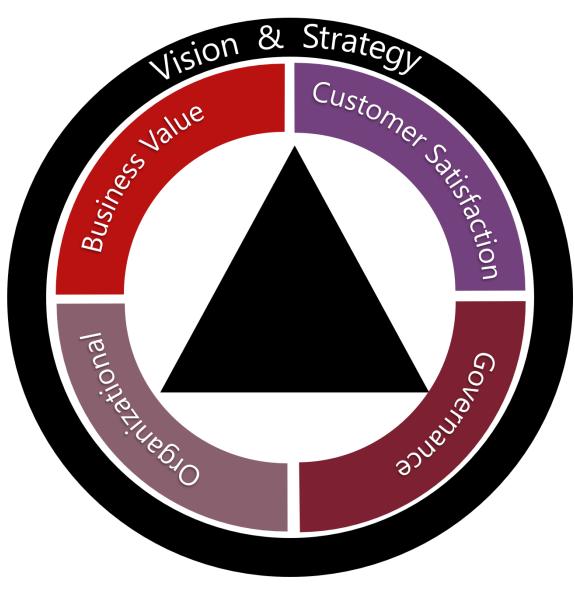
Like a Moth to a Flame



The Balanced PMO (BPMO)

Taking your Business to the next level!





Let's See What Has Been Missing!

Business Value!

We must expand our typical constraint trade-off conversation to include both expected and actual Business value.

Customer Satisfaction

Another VERY important consideration for project success. We must measure expected and actual "CSAT"

Governance

We must expand our governance models to manage both typical triple constraints AND Business Value & Governance

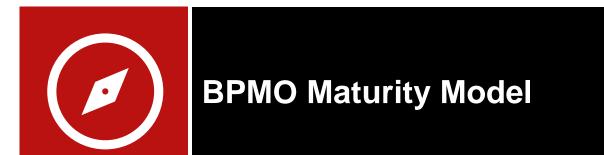
Organizational Change Management

We must educate and enable both our PMs and our stakeholders on a new model for success.





Project Trade-Offs



BPMO Telemetry



Project Trade-Offs

It's time.... to change the conversation

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I rade-Off Matrix As-is





	Fixed	Choose	Adjustable
Time			
Resources			
Scope			

Tade-Off Matrix New!





	Fixed	Choose	Adjustable
Time			\checkmark
Resources	\checkmark		
Scope			
Business Value			
Customer Satisfaction			
Governance			
Organizational Change Management		1	

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IT Cyber Attack Project _

Reduce Amount of Cyber Attacks per month.

	Fixed	Choose	Adjustable
Time			\checkmark
Resources			
Scope			
Business Value			
Customer Satisfaction			
Governance	\checkmark		
Organizational Change Management		\checkmark	



Office 365 Rollout -

Change the way we collaborate across the company.

	Fixed	Choose	Adjustable
Time			
Resources			\checkmark
Scope			
Business Value			
Customer Satisfaction			
Governance	\checkmark		
Organizational Change Management		1	

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Call to Action



Add New Areas

Move beyond the iron triangle that has been the standard for years.

Add the new categories included in the BPMO Model;

- Business Value
- Customer Satisfaction
- Organizational
- Governance

Value Prop

Updating your trade-off matrix will enable new business-centric conversations about what really matters!

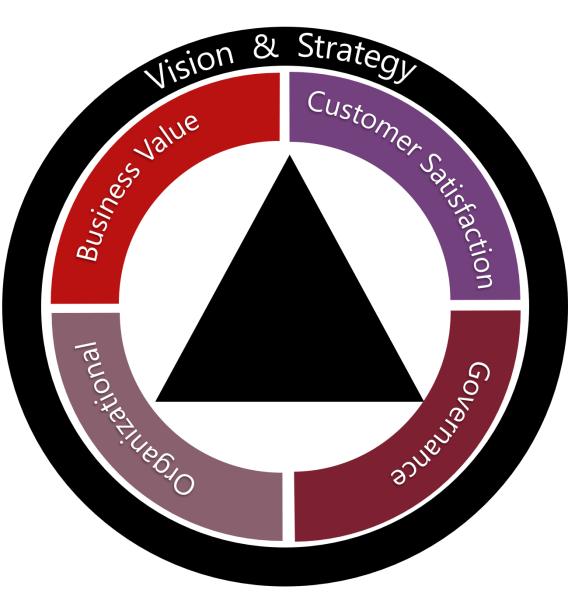
Moving to the new model will anchor project management in the enterprise business plan.

Embracing the lead for postproject benefit measurement and accountability will be attractive to your business stakeholders!

Looking Ahead

We can conclude that the Triple Constraint is neither useful for measuring project success nor for evaluating competing demands (scope, resources, time) for the business value and associated capabilities.

The BPMO is a new way of looking at making project trade-off decisions, and one that will advance both your PMO AND the business' that you support.





Project Trade-Offs



BPMO Telemetry



BPMO Maturity Model

It's time.... to change the conversation

PMO Maturity Models

Business Maturity Models



Tactical, Operational

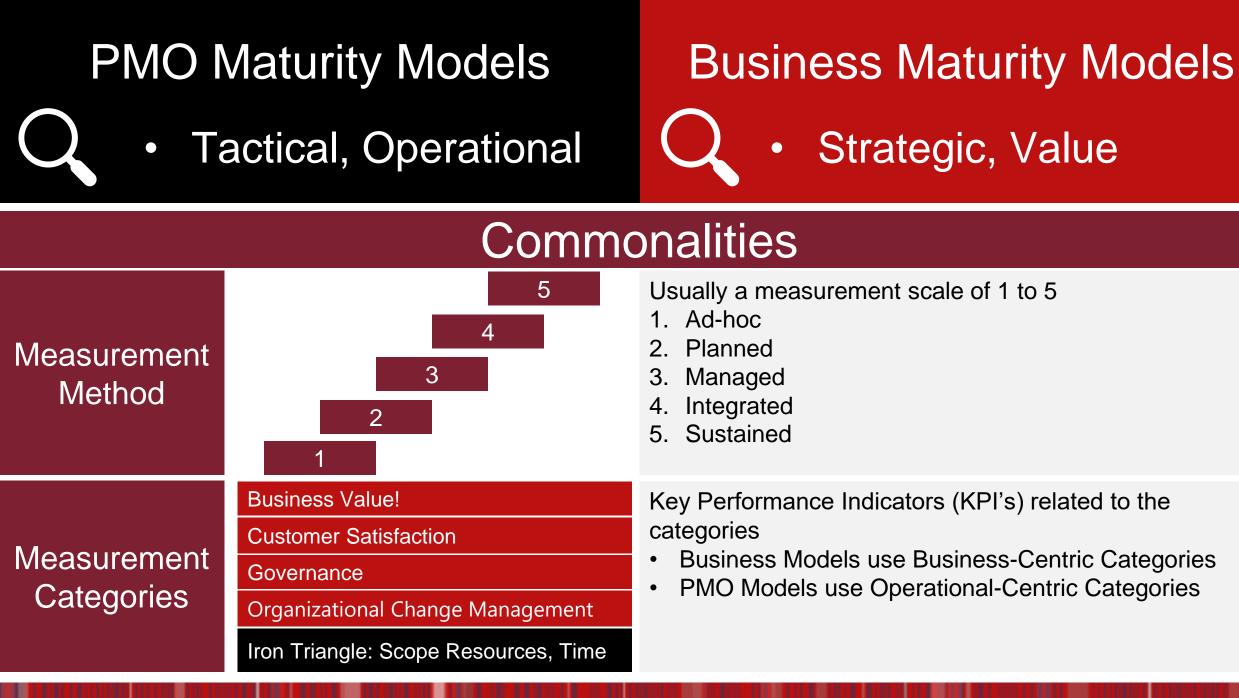


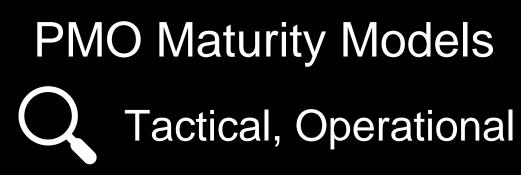
- PMMM
- OPM3
- Kerzner
- Booz Allen
- OneMind

• Strategic, Value



- Gartner
- Six Sigma
- CMMI





Business Maturity Models Q Strategic, Value



BPMO Maturity Model



Strategic & Tactical Operational & Value

= Current State Maturity
= Future State Maturity

Best Practice

Here I'm using the Kerzner Model combined with business metrics...it works great! Remember to align your Business KPI's with your Business Stakeholders



Trade-Off Decisions and BPMO Maturity Models Work Together!

	Proje	ct Trade-O	ffs	╉		$\mathbf{\mathcal{O}}$	BPMC	Matu	rity Mo	del
Fixed	Choose	Adjustable				1	2	3	4	5
				Time		i	i			
				Resources						
	\sim			Scope					1	
				Business Value				I	I	
			Cu	stomer Satisfacti	ion		I			
				Governance					I	
			Organi	zational Change	Mgmt.					



Call to Action



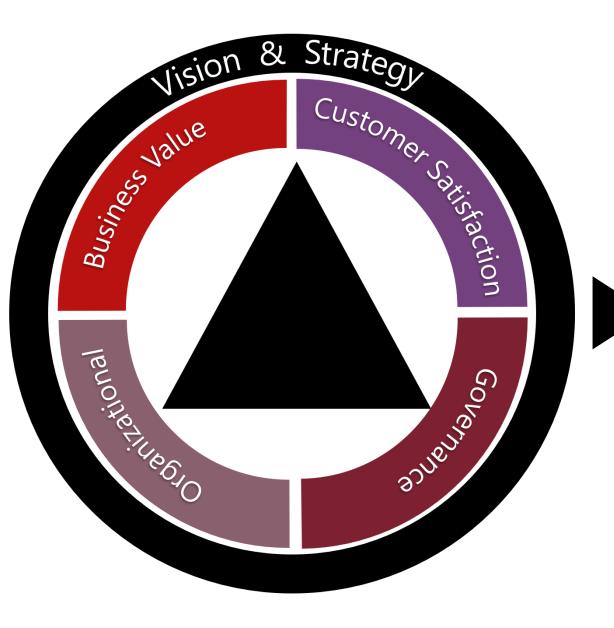
Create a BPMO Maturity Model

- Go back to your company and create a BPMO Maturity Model.
- Remember, you'll be using industry standard models like the Kerzner model AND combining that with a Business Model.
- Remember to align your business metrics with the respective business stakeholders!

Value Prop

We can no longer get away with just tracking Scope, Schedule & Resources, we have to start tracking Business Value Metrics and turning our PMO's into BPMO's!

A solid Maturity Model allows you to enable your organization to deliver strategic value!





Project Trade-Offs

BPMO Maturity Model

BPMO Telemetry



It's time.... to change the conversation

Power Bl

Dashboard Examples

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Business Value! Sales, Revenue, Net Profit, Cycle Times, ROI, NPV, GPBTI

Measure What Matters



Customer Satisfaction JD Powers Survey Results, Social Media and Customer Sentiment

Governance

IT Cyber Security Attacks, Policy Violations, Number and Age of Open Issues



Organizational Change Management Scope of Change, Number of Employees impacted, Types of Change (process, technology, roles)

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Dashboard Examples

Tips & Considerations

Consider the amount of project information that is created when managing and running your PMO & various projects.

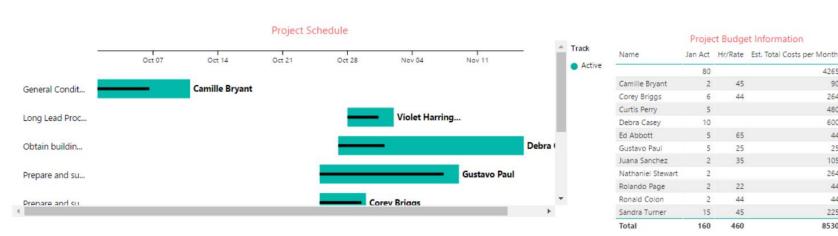
Using a single reporting repository to store and report on this information is priceless!

Think about your BPMO Maturity Model. Pull relevant KPI's into your dashboards! Remember to align Business metrics with your key business stakeholders.

Dashboard Examples

Standard Project Dashboard

- Gantt chart \bullet
 - Budget
 - Tasks



Project Tasks

Task_Name	Start_Date	Finish_Date	Scheduled_Work	Actual_Work	Percent_Complete	Resource_Name	Rate \$/hr	Actual Cost
General Conditions	Tuesday, October 09, 2018	Thursday, December 06, 2018	428h	193.6h	0.40	Camille Bryant	150	4,440.00
Receive notice to proceed and sign contract	Tuesday, October 09, 2018	Thursday, October 11, 2018	24h	24h	1.00	Curtis Perry	100	9,200.00
Submit bond and insurance documents	Tuesday, October 09, 2018	Wednesday, October 10, 2018	20h	20h	1.00	Juana Sanchez	45	2,520.00
Install temporary power	Wednesday, October 10, 2018	Thursday, October 18, 2018	40h	Oh	0.00	Della Parsons	98	7,840.00
Install temporary water service	Wednesday, October 10, 2018	Thursday, October 25, 2018	40h	Oh	0.00	Angelo Pratt	150	34,800.00
Mobilize on Site	Wednesday, October 10, 2018	Thursday, November 15, 2018	208h	Oh	0.00	Blanca Carroll	78	6,240.00
Obtain building permits	Wednesday, October 10, 2018	Friday, November 09, 2018	80h	32h	0.40	Debra Casey	90	2,160.00
Submit monthly requests for payment	Wednesday, October 10, 2018	Thursday, December 06, 2018	Oh	0h	0.10	Tara Silva	100	18,800.00
Long Lead Procurement	Thursday, October 11, 2018	Thursday, December 06, 2018	50.72h	50.72h	1.00	Violet Harrington	75	9,192.00
Submit shop drawings and order long lead items - steel	Thursday, October 11, 2018	Wednesday, November 07, 2018	1.52h	1.52h	1.00	Sandra Turner	42	6,384.00
Foundations	Sunday, October 14, 2018	Thursday, December 06, 2018	519.2h	0h	0.00	Camille Bryant	32	0.00
Drenare and submit project schedule	Sunday, October 1/, 2018	Saturday October 27, 2018	100h	20h	0.20	Guetavo Paul	67	1.072.00
Total							2231	213,441.28

Jones Construction Project Dasboard

Project **Risk & Issue** Dashboard

BPMO Telemetry

Issue

Quality Issue



Dashboard Examples

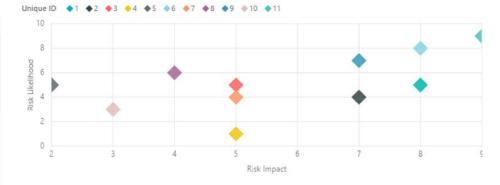
Open -



Project Risks

Closed

Project Risks



Status Reported by: How to resolve? Scope Issues Open Camille Apply a CR process to process all Quality changes Bryant Business Value Issue Open Curtis Perry Work with lead Architect before implementing an changes Budget Issue Closed Debra Casey Budget asks need to go through Finance first, and then go to the CR process Budget asks need to go through Finance first, and Budget Issue Open Diane Stanley then go to the CR process Diane Stanley HR must be involved in all HR requests before Resource Issue Open applying the CR process. Business Value Issue Open Ed Abbott Work with lead Architect before implementing an changes Open Ed Abbott All Governance issues are addressed first by the Governance Issue Security group

Apply a CR process to process all Quality changes

Open Ed Abbott

Project Issues

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Project Resource Dashboard



Resource Costs

Resource_Name	Actual_Cost	Standard_Rate	Overtime_Rate	Actual_Work
Aaron Nunez	115.50	\$150.00/h	\$150.00/h	0.77h
Alonzo Bass	0.00	\$45.00/h	\$50.00/h	0h
Angelo Pratt	0.00	\$150.00/h	\$150.00/h	0h
Beatrice Ballard	21.56	\$56.00/h	\$100.00/h	0.38h
Blanca Carroll	6,240.00	\$78.00/h	\$100.00/h	80h
Bob Franklin	0.00	\$99.00/h	\$150.00/h	0h
Brittany Padilla	737.75	\$32.00/h	\$40.00/h	23.05h
Camille Bryant	0.00	\$32.00/h	\$32.00/h	0h
Camille Bryant	0.00	\$32.00/h	\$40.00/h	0h
Camille Bryant	4,440.00	\$150.00/h	\$0.00/h	29.6h
Catherine Crawford	66.99	\$87.00/h	\$90.00/h	0.77h
Christie Greer	0.00	\$43.00/h	\$50.00/h	0h
Cody Chapman	0.00	\$54.00/h	\$60.00/h	0h
Total	25,262.63			

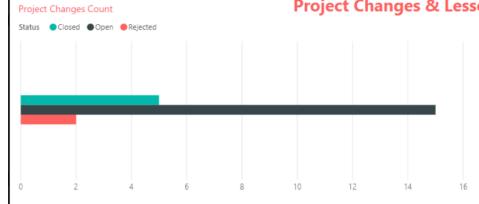
Resource Assignments

Dashboard Examples

Resource_Name	Task_Name	Start_Date	Finish_Date 🔨
Camille Bryant	General Conditions	Tuesday, October 09, 2018	Thursday, De
Curtis Perry	Receive notice to proceed and sign contract	Tuesday, October 09, 2018	Thursday, O
Juana Sanchez	Submit bond and insurance documents	Tuesday, October 09, 2018	Wednesday,
Angelo Pratt	Install temporary water service	Wednesday, October 10, 2018	Thursday, O
Blanca Carroll	Mobilize on Site	Wednesday, October 10, 2018	Thursday, Ne
Debra Casey	Obtain building permits	Wednesday, October 10, 2018	Friday, Nove
Della Parsons	Install temporary power	Wednesday, October 10, 2018	Thursday, O
Tara Silva	Submit monthly requests for payment	Wednesday, October 10, 2018	Thursday, De
Sandra Turner	Submit shop drawings and order long lead items - steel	Thursday, October 11, 2018	Wednesday,
Violet Harrington	Long Lead Procurement	Thursday, October 11, 2018	Thursday, De
Aaron Nunez	Set up site office	Sunday, October 14, 2018	Thursday, Ne
Camille Bryant	Foundations	Sunday, October 14, 2018	Thursday, De
Gustavo Paul	Prepare and submit project schedule	Sunday, October 14, 2018	Saturday, Oc
Corev Bridas	Prepare and submit schedule of values	Tuesday October 16 2018	Thursday

Dashboard Examples

Project Changes & Lessons Learned Dashboard



Project Changes & Lessons Learned Dasboard

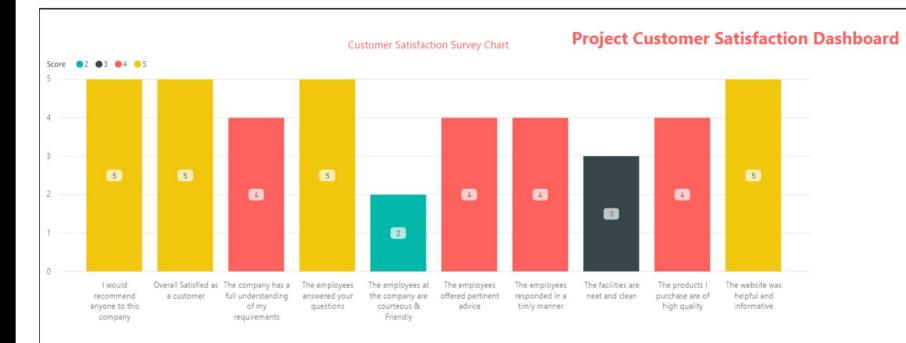
Status	Request	Date Completed
Open	Budget request to 10K more	
Open	Budget request to 10K more	Tuesday, September 25, 2
Rejected	Budget request to 10K more	
Closed	Budget request to 2K more	Saturday, April 21, 2018
Open	Budget request to 5.5K more for resource hiring	
Open	Budget request, \$ being determined	
Open	Reduce Quality by 10% to make budget	
Closed	Reduce Quality by 30%	Friday, September 21, 20
Open	Reduce Quality by 30%	
Open	Schedule change to the end of the year	
Rejected	Schedule change to the end of the year	Sunday, August 05, 2018
Closed	Scope Change to the project	Monday, April 16, 2018
Closed	Scope Change to the project	Thursday, July 05, 2018

Lessons Learned Information

ID	Lesson Learnt	Identified Opportunities for Improvement &/or Recommendations	Applicable to future projects?	Plan change required?	Report to PMO?	Status
2	All Issues need capturing at the beginning and throughout the project	More Effective and Proactive Issue management	Yes	Yes	Yes	Active & Still working
1	All Risks need capturing at the beginning and throughout the project	More effect Risk Management	Yes	No	No	Active & Still working
4	Always allow 2 more sprints then expected.	We have to plan more on our projects.	No	Yes	No	Resolved & Addressed
3	Always allow 2-3 more sprints then planned for in the project.	We have to plan more on our projects.	No	No	Yes	Resolved & Addressed
8	Bob was an Designer, we need him again to be successful.	More effective Resource Management	Yes	Yes	No	Resolved & Addressed
13	Budget Changes must have a CR process in place before approving	More effective Budget management with specific budget training for PMs at the beginning of the project.	Yes	No	Yes	Resolved & Addressed
9	Frank was an amazing developer,	More effective Resource Management	Yes	Yes	No	Resolved & Addressed
21	Issue tracking is far more important than Risk tracking for any project. We learned that the hard way!	More Effective and Proactive Issue management	Yes	No	No	Active & Still working

Dashboard Examples

Project Customer Satisfaction Dashboard



Customer Satisfaction Survey Data

Question	Score
I would recommend anyone to this company	5
Overall Satisfied as a customer	5
The company has a full understanding of my requirements	4
The employees answered your questions	5
The employees at the company are courteous & Friendly	2
The employees offered pertinent advice	4
The employees responded in a timly manner	4
The facilities are neat and clean	3
The products I purchase are of high quality	4

Project Governance Dashboard

BPMO Telemetry



Cyber Attacks/Prevention per Month by Dept

Project Governance Dashboard

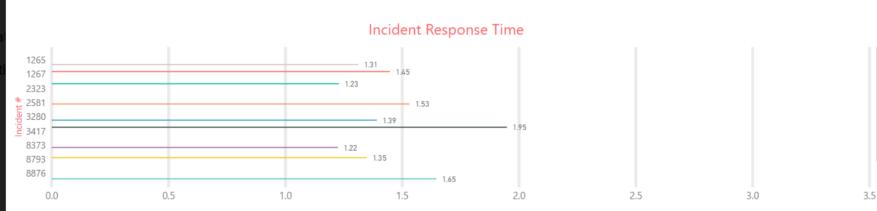
of Cyber attacks per month # of Attacks prevented 0.4M 0.3M 0.2M 0.2M 0.1M 0.2M 0.1M 0.1M

Governce Metrics

Month	Group Name	Attack Description	# of Cyber attacks per month	# of Attacks prevented
Jul	CIO	Distributed Denial of Service Attack	50000	20000
Mar	CIO	Social Engineering attack	50000	20000
May	Finance	Malware, Spyware, Ransomware	10000	4000
Oct	Finance	Social Engineering attack	10000	4000
Jan	Finance	Website Attack	10000	4000
Feb	HR	Brute Force Attack	25000	15000
Jun	HR	Brute Force Attack	25000	15000
Nov	HR	Brute Force Attack	25000	15000
Dec	IT	Brute Force Attack	100000	40000
March	IT	Distributed Denial of Service Attack	100000	40000
May	IT	Social Engineering attack	100000	40000

Dashboard Examples

Project Customer Incident Support Dashboard



Project Customer Incident Support Dashboard

Support Agent 🛛 Camille Bryant 🕘 Corey Briggs 🥚 Curtis Perry 🕒 Debra Casey 🕘 Gustavo Paul 🔵 Juana Sanchez 😑 Nathaniel Stewart 🌒 Rolando Page 🔵 Sandra Turner 🔘 Tara Silva 🌒 Violet Harrington

ID	Incident Description	Incident #	Response time	Support Agent
8	Help ordering from Website	1265	1.31	Tara Silva
2	New User ID	1267	1.45	Curtis Perry
1	Password Reset	2323	1.23	Camille Bryant
11	Looking for Product information	2581	1.53	Nathaniel Stewart
10	New User ID	3280	1.39	Sandra Turner
5	Password Reset	3417	1.95	Corey Briggs
7	Looking for Product information	8373	1.22	Rolando Page
6	New User ID	8793	1.35	Debra Casey
9	Password Reset	8876	1.65	Violet Harrington
3	Help ordering from Website	8923	1.60	Juana Sanchez
4	New contact Request	9012	3.31	Gustavo Paul

Example Projects Project #1 – Jones Customer Incident Support
Purpose: Reduce response time down from 60 mins
to 10 mins per support call.
Business Value: Customers Satisfaction increase,
reduced cost per incident, increased incident
velocity

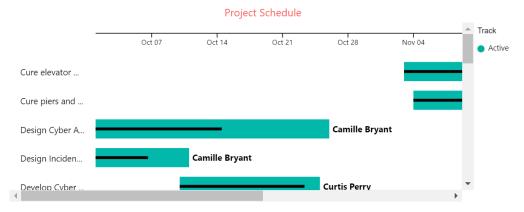
Dashboard Examples

Project #2 – Jones Cyber Attack

Purpose: Reduce the number of cyber attacks **Business Value:** Decrease in labor costs to deal with cyber attacks, increase in productivity, increased employee satisfaction, Revenue loss exposure decreased.

Dashboard Examples

Merging the two worlds



Jones Customer Incident Response Project Dashboard



Support Agent Camille Bry... Corey Briggs Curtis Perry Debra Casey Gustavo Paul

Project Budget Information

			-
Name	Jan Act	Hr/Rate	Est. Total Costs per Month
	80		4265
Camille Bryant	2	45	90
Corey Briggs	6	44	264
Curtis Perry	5		480
Debra Casey	10		600
Ed Abbott	5	65	44
Gustavo Paul	5	25	25
Juana Sanchez	2	35	105
Nathaniel Stewart	2		264
Rolando Page	2	22	44
Ronald Colon	2	44	44
Sandra Turner	15	45	225
Tara Silva	10		679
Total	160	460	8530

Project Tasks					
Task_Name	Start_Date	Finish_Date	Sc~		
Design Incident Response System	Tuesday, October 09, 2018	Thursday, December 06, 2018	42		
Develop Incident Response System	Tuesday, October 09, 2018	Thursday, October 11, 2018	24		
Prototype Incident Response System	Tuesday, October 09, 2018	Wednesday, October 10, 2018	20		
Install temporary power	Wednesday, October 10, 2018	Thursday, October 18, 2018	40		
Install temporary water service	Wednesday, October 10, 2018	Thursday, October 25, 2018	40		
Mobilize on Site	Wednesday, October 10, 2018	Thursday, November 15, 2018	20		
Retire old Incident Response system	Wednesday, October 10, 2018	Thursday, December 06, 2018	0h		
Train Customer Support Reps on System	Wednesday, October 10, 2018	Friday, November 09, 2018	80		
Migrate Data from old system to new system	Thursday, October 11, 2018	Thursday, December 06, 2018	50		
Submit shop drawings and order long lead items - steel Total	Thursday, October 11, 2018	Wednesday, November 07, 2019	<u>1 '</u>		
<			>		

Dashboard Examples

Jones Cyber Attack Project Dashboard

Merging the two worlds

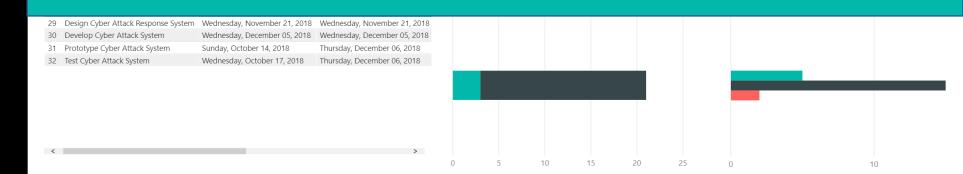
Project Budget Information

Name	Jan Act	Hr/Rate	Est. Total Costs per Month
	80		4265
Camille Bryant	2	45	90
Corey Briggs	6	44	264
Curtis Perry	5		480
Debra Casey	10		600
Ed Abbott	5	65	44
Gustavo Paul	5	25	25
Juana Canchaz	2	25	105

Cyber Attacks/Prevention per Month by Dept



The BPMO Mergers the two worlds together!



Power Bl

Building Dashboards

Power Bl

"Connect to what matters to you. Excel spreadsheets, on-premises data sources, big data, streaming data, and cloud services..."



Excel



Azure Analysis Services



Google Analytics

Azure SQL Database

SQL

CSV

CSV



Web Pages



MySQL





SharePoint Lists



Oracle



Salesforce



MailChimp

Building Dashboards

Power Bl

"Connect to **what matters to you**. Excel spreadsheets, on-premises data sources, big data, streaming data, and cloud services..."



#	Step Name	Description
1	Collect	In this step the project manager and the team document where all the relevant project files are located. Some files may need to be moved from their current locations to ensure that they are accessible when the data is pulled into the BI tools. Keeping all the project files together in a centrally accessible location is good practice, and doing so makes reporting from this data much easier.
2	Prepare	In this step, the project manager is preparing the data for use with the BI tools.
3	Consume	Once the file locations are known and the data is prepared, the BI tools are used to consume the data. This step takes data from the many different files, locations and formats and feeds the data into the BI tools.
4	Shape	Because the project data comes from a variety of source files, locations and formats, some changes are often required to match data formats and descriptive items. Shaping may also be needed to filter out unneeded information, leaving behind just the data required for the required reporting.
5	Visualize	Once the data has been consumed and shaped, it is ready for visualization. There are many visualization techniques that can be applied to express project information, including charts, graphs and tables. In the next section we will share some examples.
6	Share	Once the project BI reports have been created, the project manager needs to share these reports with the target stakeholder groups. There are a variety of means to share these reports ranging from emailing a copy, pasting snapshots into other reports, and posting to a shared drive or team site. BI reports are created to increase the readers understanding of the complex data that is fed into them, so sharing these reports is arguably the most important step in the BI process.
7	Consume	After the project BI reports have been shared, the project stakeholders can access the reports, and using the controls and options therein gain a quick and deep understanding of the state of the project. The BI report consumption method depends on the means by which the BI reports are shared.
8	Refresh	BI reports can be refreshed over the life of the project.

Power Bl





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Call to Action



Build!

- Building your dashboards will give you a whole new level of reporting within your BPMO. Especially with the mobile component!
- Spend the time to understand the process of moving data between the various source systems e.g. MS Project, Excel, to build your own reports.
- Dashboards should include both project AND business specific metrics to ensure you are moving your BPMO AND the Business forward.





The PMO Conference London 2018

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