PMO SERVICE CATALOGUE ADDENDUM

Contents

PMO Services and PMO Service Management
v0.4

This addendum to the PMO Service Catalogue provides a wider context than just the development and maintenance of the service catalogue; it covers the setup, running and closing of the services themselves.

1. DEFINITION OF A PMO SERVICE

One or more activities undertaken to produce an output for a customer that delivers a desired outcome for the organisation.

In order to deliver PMO services, a PMO must have:

- Individuals with the right level of competence
- Organisation/PMO governance and infrastructure
- Capacity

The setting up or closing down of a service can be run as a project and the Centre of Excellence may have standard processes, procedures, tools and templates.

2. SELECTION OF PMO SERVICES TO BE DELIVERED

PMOs deliver services where it is more effective, efficient or economically advantageous for them to do so than other people within the delivery organisation, or when control needs to be applied. The PMO may outsource all or part of the delivery of the service to others within or external to the organisation.

PMOs have many customers – all with their own needs and wants from the PMO. Any services to be delivered by a PMO will be aligned to the vision of the PMO(s) which in turn is aligned to the strategy of the organisation.

PMO governance ensures that the mix of PMO services provided are appropriately resourced and funded. The decision to setup a new PMO service is supported by information provided in a PMO Service Strategy, but cannot be taken in isolation of the other services currently being provided and those in setup. Due to limited capability, capacity, or funding, agreeing to setting up a new service, may require closing another.

3. PMO SERVICE ROLES

3.1. PMO Service Owner

A role undertaken within the PMO, accountable for the setup, running and closing of PMO services that deliver the required objectives. The role includes the monitoring of PMO service outcomes and KPIs and ensure any risks and issues are addressed.

This role is appointed by the PMO Director and is typically undertaken by a PMO Director or a PMO Manager.

3.2. PMO Service Manager

A role undertaken within the PMO, responsible for the day to day running of the PMO service. The role includes KPI reporting in relation to the PMO services.

This role is typically undertaken by a PMO Manager or a PMO Analyst.

3.3. PMO Service Operative

A role undertaken within the PMO and/or on behalf of the PMO, responsible for the execution of the process(es) required to deliver the outputs of the PMO service.

If the role is undertaken within the PMO, the role is typically undertaken by one or more PMO Analysts or PMO Administrators.

NB: The role of PMO Service Owner, PMO Service Manager and PMO Service Operative may all be held by one person. Where a PMO service is delivered by multiple PMOs, there may be multiple PMO Service Managers.

4. KEY DOCUMENTATION

4.1. PMO SERVICE STRATEGY

The PMO service strategy is a key document that provides the PMO's strategy for delivering services to its customers, including:

- How the requested services will be prioritised (typically based on alignment to the PMO vision and contribution to the strategy of the organisation)
- The principles for applying resources and funding for the services (including principles for recharging).

Ideally, there is a single PMO Service Strategy for the organisation – identifying how all the PMO services are provided via the various PMOs throughout the organisation.

The PMO Service Strategy is owned by the PMO Director.

4.2. PMO SERVICE CATALOGUE

Details to be found in the core text.

4.3. PMO OPERATIONS HANDBOOK

The PMO Operations Handbook details all the procedures that are undertaken within the PMO. They detail the RACI (who is Responsible, Accountable, Consulted and Informed) for each constitute activity, along with the specific tools and techniques used. They cover all activities required to deliver and monitor the PMO Services along with activities required to undertake performance monitoring of the PMO.

For some organisations, the PMO Operations Handbook will also contain procedures required to recharge the services as determined in the PMO Service Strategy.
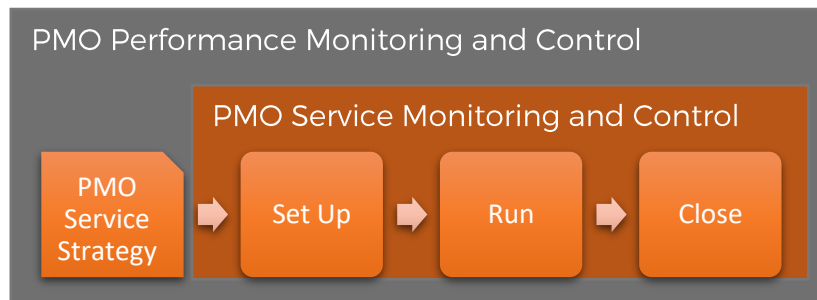
The PMO Operations Handbook is owned by the PMO Manager.

5. PMO SERVICE DELIVERY – The PMO Service Lifecycle

5.1. SETTING UP A PMO SERVICE

Setting up a PMO Service includes the design, test/ pilot and transition of the PMO service into PMO operations.

When a decision has been made to commence delivery of a service, the PMO Director and PMO Manager(s) will agree which PMO(s) is best placed to deliver or manage the outsourcing of the service and, where appropriate, appoint relevant PMO Service Manager(s).

Considerations in this decision include:

- Content of the PMO Service Strategy
- Available competence and capacity
- Other services currently delivered by that PMO
- The customers and stakeholders
- The scope of the service (a project/ programme, multiple projects or programmes, portfolio or organisation)

In some situations, where there is a lack of internal competence to deliver the service, it may still be preferable to invest time and effort to develop the competence than outsource the service.

Using the content of the Service Strategy (and any useful artefacts from any current or previously delivered PMO service) the high level process(es) required to underpin PMO service are defined and agreed with the relevant stakeholder and contributors.

The process can be documented in a SIPOC table/ diagram (Suppliers/ Inputs/ Process/ Outputs/ Customer - see below) and forms part of the entry within the PMO Service Catalogue.

Suppliers	Inputs*	Process	Outputs*	Customers
Any role or system that provides inputs to the process.	Something that is transformed, consumed, used or processed in the service May often act as a trigger for the process	A number of steps taken to convert inputs into outputs (often represented in a swimlanes diagram)	What is created by the process	Any role or system that receives the output from the process

*Some inputs and outputs may have defined quality criteria.

For some of the processes underpinning the service, the outputs of one process may by the input of another process. When designing the PMO service, these dependencies need to be considered.

The detailed procedures to be undertaken by the PMO(s) will also need to be defined and included in the relevant PMO Operations Handbooks. Procedures for monitoring the PMO services and any impact on PMO performance monitoring may also need to be designed or updated.

All Processes and procedures require testing prior to transitioning into PMO business as usual. This may include piloting the service with a selection of suppliers, customers and PMO Service Operatives.

Testing can be used to:

- confirm the governance and critical success factors are in place
- verify the process and procedures achieve the success criteria agreed with the customers
- confirm the resources are available to deliver the service to the required standard.

Undertaking the testing and pilot of a service also provides the opportunity to validate that the services will deliver the expected outcomes.

During the testing and pilot, the PMO service, processes and procedures (including the respective PMO Service Strategy, PMO Service Catalogue and PMO Handbook) may be modified in light of the results.

Following formal sign off of the service after testing/ pilot is completed (which may take several iterations), and an organisation readiness assessment, the PMO service (along with appropriate monitoring and control processes) can be transitioned into PMO business as usual, through a phased or big-bang approach. It is important to recognise that the successful implementation and embedding of many PMO services will require behavioural change by one or more individuals and therefore will need to be managed as organisational change to ensure the required behaviours are also embedded in order to deliver

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

the desired outcomes. This may require one or more temporary supporting services to be implemented alongside the requested service.

5.2. RUNNING A PMO SERVICE

Delivery of the PMO Services can be seen as the 'business as usual' work of the PMO and, like other BAU activities requires ongoing management to ensure the required level of service is maintained and the objectives of delivering the PMO service are being achieved. This is supported by the monitoring of KPI reporting as detailed within the PMO Operations Handbook.

Risks and issues to the service will need to be managed, with appropriate escalation from PMO Service Operations, through PMO Delivery Management to PMO Service Ownership to agree and manage appropriate mitigation and action, which may include making changes to the PMO service or even closing the PMO service.

There are many other reasons why the PMO service may need to be changed. These include:

- Changes in the business context
- Feedback from customers, PMO Service Operatives or stakeholders
- Changes in policies or available tools and techniques

Some changes will be formally requested via a change request. Other changes will be undertaken through continuous improvement activities manged by the PMO Service Manager.

Any changes applied to the service require agreement with the PMO Service Owner. All changes need to be reflected in the PMO Service Strategy, PMO Service Catalogue and PMO Operations Handbook as appropriate.

5.3. CLOSING A PMO SERVICE

There are many reasons why a PMO service requires closing. This can include:

- Reaching the date it was agreed to stop the PMO service (this is particularly relevant for temporary supporting services)
- Achieving the desired objective of the delivering the PMO service, which on being achieved, does not need the PMO service to continue to be delivered
- Resources required to deliver the PMO service are required for other work or are no longer available
- A request from the service stakeholders or PMO Service Owner to close the PMO service
- It is no longer more effective, efficient or economically advantageous for the PMO to deliver the service.
- It has been recognised that the level of service or desired outcomes cannot be achieved
- A new PMO service replaces or supersedes the current PMO service
- A change in focus for the PMO

Closing the service should be undertaken in an orderly fashion and with formal approval of the PMO Service Owner.

Similar to the implementation of the PMO service, closure of the service may require behavioural change by one or more individuals and the closure will need to be managed as an organisational change.

When closing the PMO service, all artefacts pertaining to the service should be reviewed to identify those that may be useful for future reference ie if the PMO reintroduces the PMO service, or another PMO in the organisation begins to deliver the service.

New Service: Maintain Project Diary

Service Description
To ensure there is a central diary maintained (kept up o date) containing all key events in relation to the project.

What the service provides for the customer
A single source of the truth pulled from multiple sources across the project and organisation.

Why is this service being offered to the customer?

How PMO will apply this service

Supplier	Input	Process	Output	Customer
Project Managers Programme Managers Portfolio Managers Stakeholders	Project Diary Event Details	Update Diary	Project Diary Stakeholder Communications	Project Managers Programme Managers Portfolio Managers Stakeholders

Establish Initial Diary

Work with the key project members to identify what dates need to go in the diary.

Establish feeds and recipients

Understand who owns the dates for each activity/ event and ensure you are on their communications plan for any updates or changes. Maintain a list of all stakeholders who need to know of updates or changes to the diary.

Maintain

Keep diary up to date with all changes and ensure recipients receive updated copies as required.

How the PMO will measure the value of this service

- Days' notice of any changes (which may be out of PMOs control).

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

Criteria when the PMO will use this service
• Typically offered by an embedded PMO working directly for a single project or programme.
• Can be offered by a portfolio PMO when supporting the project approval board.

Helpful hints for the PMO when delivering the service
• Consider providing a regular update as well as an expedited process for last minute updates
• Keep an associated log of changes, including a date of when the changes were agreed

PMO Capabilities to fulfil this service

Competencies	Techniques and Generic Tools

Related services

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

New Service: Maintain Organisation Chart Overview

Service Description
To ensure the project organisation chart is maintained to provide clarity on governance structures and contact details within the project and organisation.

What the service provides for the customer
A single of the truth pulled from multiple sources across the project and organisation.

Why is this service being offered to the customer?

How PMO will apply this service

Supplier	Input	Process	Output	Customer
HR Project Managers Programme Managers Portfolio Managers Stakeholders	Organisation Chart Project Starter/ Leaver Details Role Descriptions	Update Organisation Chart	Organisation Chart Stakeholder Communications	Project Managers Programme Managers Portfolio Managers Stakeholders

Establish Initial Chart

Work with the key project members to identify source information.

Establish feeds and recipients

Understand key contacts within the project and the organisation and you are on their communications plan for any updates or changes. Maintain a list of all stakeholders who need to know of updates or changes to the organisation chart.

Maintain

Keep chart up to date with all changes and ensure recipients receive updated copies as required.

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

How the PMO will measure the value of this service

- Days' notice of any changes (which may be out of PMOs control).

Criteria when the PMO will use this service

- Typically offered by an embedded PMO working directly for a single project or programme.

- Can be offered by a portfolio PMO when supporting the project approval board.

Helpful hints for the PMO when delivering the service

- Consider providing a regular update as well as an expedited process for last minute updates

- Keep an associated log of changes, including a date of when the changes were agreed

- Put an 'as at' date on the diary so recipients know when the chart was last updated

- Consider links to other services such as induction of project resources

PMO Capabilities to fulfil this service

Competencies	Techniques and Generic Tools

Related services

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

New Service: GDPR Request

Service Description
On behalf of the project or programme manager, provide information from the project or programme that can be released under confidentiality rules.

What the service provides for the customer
This provides internal or external stakeholders with the information they require from the project.

Why is this service being offered to the customer?

How PMO will apply this service

Supplier	Input	Process	Output	Customer
Stakeholders	Information Request	Answer questions	Information Answer	Stakeholders

How the PMO will measure the value of this service

- Response times.
- Time saved by project, programme, or portfolio manager.

Criteria when the PMO will use this service

- When the PMO is aligned to a single project or programme manager.
- Where there is a lot of information about the project or programme.

Helpful hints for the PMO when delivering the service

- If the PMO is getting regular requests for information from a particular stakeholder, consider getting them added to the stakeholder communication plan.
- If there are requests coming in from the same or similar information, then consider creating a standard format/ template.

PMO Capabilities to fulfil this service

Competencies	Techniques and Generic Tools

House of PMO
HOME TO PMO PROFESSIONALS

New Service: Facilitate Benefits Mapping Workshop

Service Description
Facilitate a workshop which helps discover benefits of a project or programme and identify links from project deliverables, through business change to strategic/ programme goals.

What the service provides for the customer
• It helps Project Execs / SROs to clearly articulate the benefits of their project or programme
• It helps ensure everyone understand the anticipated benefits to be delivered, thereby contributes to gaining buy-in to a project or programme
• It provides project / program managers with a standard approach for benefits to be identified for inclusion in the business case and consistent alignment with programme/ strategic goals.
• It aligns the benefits with a viable change management plan and benefit measures to be agreed and for benefit owners to be identified to help ensure benefits are realized beyond the life of a project/ programme.

Why is this service being offered to the customer?
• The PMO provides expert advice and guidance on the consistent assessment and categorisation of benefits.
• The PMO provides objective challenge for benefits identified.
• The PMO provide input and knowledge of other benefits maps (to challenge potential overlaps and gaps) within the programme/ portfolio.
• The PMO provides project / programme managers with a standard approach for benefits to be identified; for benefit measures to be agreed and for benefit owners to be identified.
• The PMO provides expert facilitation services to allow focus on all contributors on the subject matter rather than the workshop process.

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

Supplier	Input	Process	Output	Customer
Project Exec / SRO PMO Participants	Mandate Vision Facilitation best practice Stakeholder knowledge / opinions	Plan workshop Run workshop Close workshop	A completed benefits map	Project Exec / SRO Project / Programme Manager

The PMO will run this sort of workshop as part of the definition process, at the request of a Project Exec / SRO or Project/Program Manager. It is advisable to hold a pre-brief / planning session to understand the initial rationale why the project or program has been initiated and to agree the agenda for the workshop. They will then facilitate the workshop (or series of workshops) to build up a complete benefits map, which will detail the output(s); enabling/business changes required to realise the benefits and the alignment with strategic goals. Discussions should also be held over who will own each of the benefits identified and how success will be measured. This information can then be built upon to provide a benefits profile per benefit identified and will feed into a robust business case.

How the PMO will measure the value of this service

The PMO can measure this by asking for feedback on the success of the workshop from attendees, particularly the project or program manager and the Project Exec / SRO. An alternative view could be requested from the Portfolio Manager and Business Case approvers, to assess whether the quality of Benefits articulated within business case documents has "improved".

Criteria when the PMO will use this service

- When the organisation wishes to have consistent quality business case documentation

- When the organisation wishes to map out how its projects/programs will help achieve its strategic goals

- When a Project Exec / SRO wishes to gain buy-in to their project / program

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

Helpful hints for the PMO when delivering the service

- Invite stakeholders from across the organisation who will own / realise the benefits that will be delivered – invite a broad cross section to pool knowledge.

- Consider developing a benefits map template and standard agenda for such a session – to ensure consistency of approach.

- Build the benefits map up from right (strategic goals) to left (outputs).

- Train several members of the PMO on the benefits management process and facilitation techniques to be able to facilitate such a session.

- A series of workshops may be required to fully complete the benefits map.

PMO Capabilities to fulfil this service

Competencies	Techniques and Generic Tools
Benefits Management	Facilitation
Business Case	MIRO / MS Whiteboard
Change Management	Brown paper & post-it notes
	PESTLE / SWOT / MEDIC

Related services

Track and report on benefits realization

Develop benefits management framework

New Service: Sign Of Contractor Timesheets

Service Description

Validate time on the contractor invoices matches the time approved within the time sheeting system

What the service provides for the customer

- This ensures the correct costs for contractors is charged to the relevant projects, programmes, or portfolio

Why is this service being offered to the customer?

- Resources may work across multiple projects and programmes and no individual project or programme manager has a consolidated view of overall usage within the organisation

How PMO will apply this service

Supplier	Input	Process	Output	Customer
Timesheeting System (PMO) Contractors/ Agencies	Consolidation of Approved Time Contractor/ Agency Invoice	Validate time on invoice matches approved time in the system	Approved Invoice	Project/ Programme/ Portfolio Manager Contractor/ Agencies

How the PMO will measure the value of this service

- Number of discrepancies between time booked to a project and costs allocated

- Timely payment of contractors

Criteria when the PMO will use this service

- When contractors work across multiple projects and programmes

- Invoices are not sent directly to the project/ programme/ portfolio managers

Helpful hints for the PMO when delivering the service

- Invoices may be grouped at Agency level covering several contractors

- NB this is receipting of the invoice NOT approval of time booked in the time sheeting system which is the responsibility of the project or programme manager

PMO Capabilities to fulfil this service	
Competencies	Techniques and Generic Tools
Financial Management

P3M Administration

Resource Management | Finance system

Procurement system |
| *Related services*

Chase missing timesheets

Financial reporting

Financial forecasting | |

New Service: Maintain Timesheeting System

Service Description
Maintain the timesheeting system for use by the delivery teams

What the service provides for the customer

- The ability to analyse actual time booked against each project activity
- The ability to compare actual time vs planned effort
- Calculation of costs to be charged to the project or programme
- Access to actual historical data for project planning and forecasting

Why is this service being offered to the customer?

- To provide accurate project costing
- To improve project estimating and forecasting

How PMO will apply this service

Supplier	Input	Process	Output	Customer
PMO Project/ Programme/ Portfolio HR	Timesheeting System Project Plans People data	Add/ remove users Add/ remove resources Add/ remove projects Apply updates	Updated Timesheeting tool	Project/ Programme/ Portfolio Managers and Teams Finance HR PMO

How the PMO will measure the value of this service

- % of resources in the Timesheeting system
- Time taken to set up users and projects
- User complaints

Criteria when the PMO will use this service

- When there isn't a corporate time recording system that records time on specific activities (eg a flexi time recording system/ clocking in system)

Helpful hints for the PMO when delivering the service

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

- Provide user instructions for the timesheeting system as part of induction

- Where possible, set up automated reminders and notifications

- Consider integration with HR and Finance systems and processes (remembering what the source and quality of the master data)

- Remember to update individual data when moving team, promotion etc

PMO Capabilities to fulfil this service

Competencies	Techniques and Generic Tools
Information Management Resource Management P3M Tools	Timesheeting System

Related services

Chase missing timesheets

Sign off contractor timesheets

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

New Service: Define and Maintain Role Access Requirements

Service Description
Define and maintain tool access requirements for each role defined in the delivery framework
What the service provides for the customer
• Detailed list of P3M systems access requirements for each role, in line with corporate IT security policy
Why is this service being offered to the customer?
• To maintain confidentiality, integrity, and availability of information in line with the corporate IT security policy
• To provide project and programme managers with potential cost information for the Business Case
• To provide an understanding of the lead time required for access from project start up
• To allow IT to forecast systems usage

How PMO will apply this service

Supplier	Input	Process	Output	Customer
PMO	Tools and content IT Security Policy Role Profiles	Map role profile tools based on data requirements	Access requirements per role	Project, Programme and Portfolio Managers IT

How the PMO will measure the value of this service
• Number of additional requests for tool access through the life of the project or programme
• Usage (particularly non-usage)
Criteria when the PMO will use this service
• Where there are multiple P3M tools that are used across multiple projects and programmes

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

- Where there are licensing implications

- Where confidentiality and data integrity are required

Helpful hints for the PMO when delivering the service

- Keep up to date as new P3M systems are introduced

- Keep up to date as role definitions evolve in the delivery framework

- Validate requirements against any tailoring of roles within a project or programme

- Consider making some tools optional

- Consider differentiating between employed and 3rd party access requirements

- Explicitly highlight budgetary impacts of licences eg MSP, Visio, Power-BI etc

PMO Capabilities to fulfil this service

Competencies	Techniques and Generic Tools
Information Management	Mapping
P3M Tools	Analysis
P3M Delivery Framework	

Related services

Manages project management tools (systems admin)

New Service: Maintain Directory of Analysis Techniques

Service Description
Maintain a directory of analysis techniques along with instructions and hands on support.

What the service provides for the customer

- A defined list of analysis techniques that can be used on their projects and programmes to provide additional insights to support decision making

- Support and training on the techniques

- Expertise in the interpretation and presentation of the results

Why is this service being offered to the customer?

- The PMO provides expert advice and guidance on the when and how to use the techniques to best effect

- The PMO provides hands on support in the application of the techniques along with interpretation and presenting the outputs

- The PMO continues to expand the directory based on developing best practice in the industry

How PMO will apply this service

Supplier	Input	Process	Output	Customer
Industry/ profession Project/ Programme Managers	Generic analysis tools Project/ programme analysis requirement	Localisation of techniques	Directory of techniques How to instructions List of subject matter experts	Project/ Programme Manager

The PMO may identify techniques that may not seem immediately applicable to a project or programme context. Localisation is not only for the organisation but also the P3M context.

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

How the PMO will measure the value of this service

- Number of requests to use the techniques

- Increased level of insight into the project data

- Better project and programmes decision making and subsequent outcomes

Criteria when the PMO will use this service

- In mature P3M organisations where the delivery framework is not fully prescriptive

- Where time and focus is given to project and programme decision making

Helpful hints for the PMO when delivering the service

- Make the application of the tool as simple as possible – use automation tools where possible

- Focus on the output rather than the process

PMO Capabilities to fulfil this service

Competencies	Techniques and Generic Tools
Information Management Knowledge Management Reporting, Insights and Analysis	Spreadsheets Automation Tools

Related services

Support the Project Approval Board

Provision of Management Dashboards

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

New Service: Deliver Consolidated Audit Recommendation Action Plan

Service Description
Consolidation of all project/ programme assurance review recommendations into one holistic action plan for portfolio improvement.

What the service provides for the customer

- This provides the PMO and Portfolio Director as well as the Executive Board with an overview of the common issues experienced across all of the projects and programmes.

- It then provides a critical review of why that is; what the impact is and the recommended actions to take to prevent the issues affecting future projects and programmes, thereby improving their chances of success.

Why is this service being offered to the customer?

All projects and programmes will be subject to assurance reviews over their lifecycles. Each review will result in a set of recommendations for the project or programme to implement to improve their chances of success. However, those recommendations will relate specifically to that project or programme and will usually only be shared with that Project Executive / SRO and their Board(s).
The PMO is ideally placed to see all the project / programme review outcomes and to identify common issues across all the projects and programmes. This would suggest some systematic issues with the P3M Delivery Framework and associated processes, which, if addressed, would improve the chances of success of all the other projects and programmes, including future ones. Consequently, the overall P3M capability and maturity of the organization should improve.

How PMO will apply this service

Supplier	Input	Process	Output	Customer
PMO	All project/ programme/ assurance review outcomes/ reports	Root cause analysis of common recommendations across all projects/ programmes as identified within the assurance review outcomes/ reports	An action plan for portfolio improvement	PMO Director Portfolio Director Executive Board

HOUSE OF PMO
HOME TO PMO PROFESSIONALS

How the PMO will measure the value of this service

- It can be measured by the increase in the success of the projects and programmes

- It can be measured via either a self-assessment or an external assessment of the capability and maturity levels of the organization

Criteria when the PMO will use this service

- When there is a desire to improve P3M maturity within the organization

- When the PMO has the ability to provide a critical review

Helpful hints for the PMO when delivering the service

- Address the points that will have the biggest impact/ add the most value to the organization first

- Obtain approval of the action plan from Portfolio leadership eg Portfolio Board; Investment Committee or from the Executive Board

- Remember to set an example and follow the organization's Delivery Methodology if a business improvement project/ programme is required to implement the action plan

PMO Capabilities to fulfil this service	
Competencies	Techniques and Generic Tools
P3 Enabling: Assurance	Root cause analysis
Change Management	Business/ process analysis

Related services

HOUSE OF PMO
HOME TO PMO PROFESSIONALS