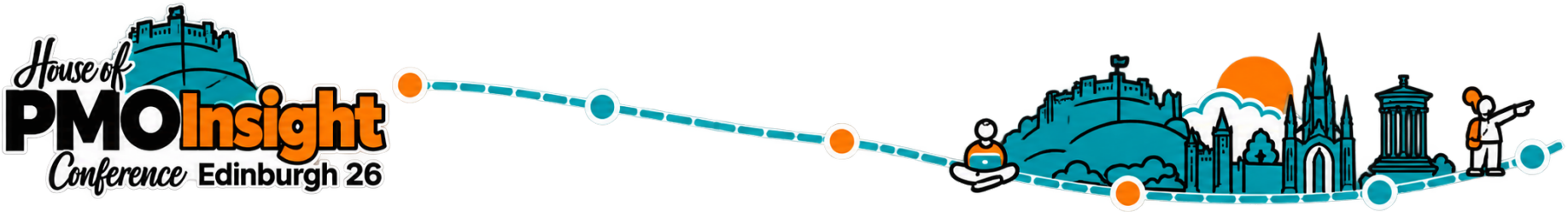
The PMO Insight Conference

Edinburgh 2026



This session will be starting shortly

Please take your seats

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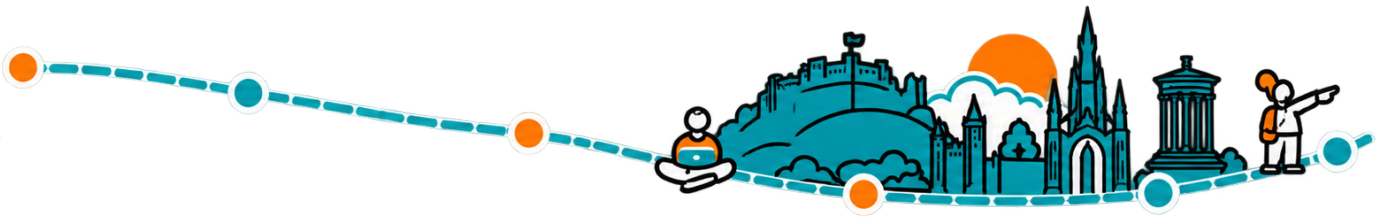

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Welcome to the
PMO Insight Conference
From Reporting to Insight
Building the Decision-Enabling PMO

Lindsay Scott and Eileen J Roden

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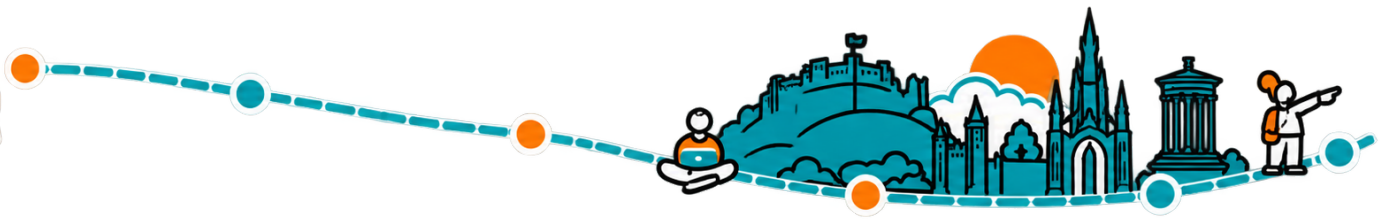

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It’s good to have the PMO community come together



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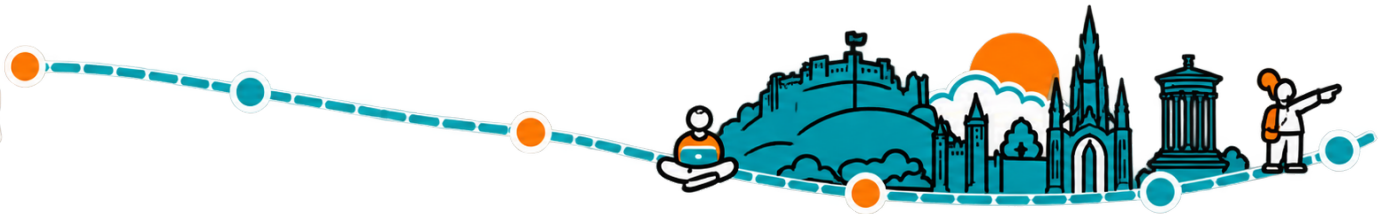


Who's in the room?



First House of PMO event?



Here with PMO colleagues?



Travelled from outside Scotland?



Work in a one-person PMO?



Already checked your emails this morning?

More reporting doesn't automatically mean better decisions

From producing information to helping organisations understand, decide and act



A WORKING CONFERENCE

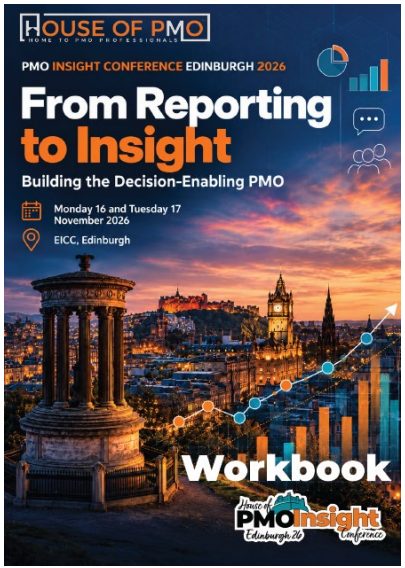
Listen / Learn / Think / Challenge / Discuss / Apply / Plan

You're not here to simply listen



TWO WAYS TO CAPTURE THE LEARNING

Your Workbook



Your thinking, notes, actions, plan

Your Table Outputs



Experiences, discussions, collective insights

THE PMO INSIGHT JOURNEY



What do you want to leave with?



Think about your own PMO and the one challenge or decision you would really like to make progress with



Take two minutes to capture your first thoughts

Make the Most of These Two Days



Read the workbook prompts before each session



Use the conference app for updates, interaction and resources





Talk to people, ask questions and ask for help

Partners, speakers and the House of PMO team are here to help

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Let's Get Started!

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Why PMO Reporting Has to Change

Eileen J Roden
House of PMO

Ask a Question during any session in the conference app

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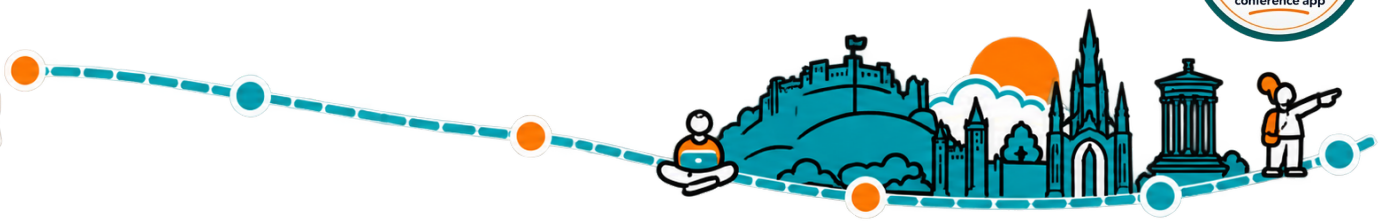


THE UNCOMFORTABLE QUESTION

If nothing is decided
or no action is taken,
why is the report being produced?

THE PMO REPORTING TRAP

CHASE → COPY → PASTE → FORMAT → SEND

Too much energy producing the pack
Not enough improving the decision

AI can make poor reporting happen faster
- that's efficiency not insight

MORE DASHBOARDS ≠ MORE INSIGHT

MORE DATA	MORE CHARTS	MORE AI
Unnecessary noise and distraction	Look great, but says nothing	Beautifully written summaries from questionable input

The gap is often meaning, context, judgement or follow-through.

ACCURATE STILL ISN'T ENOUGH

It may tell us . . .

WHAT HAPPENED
STATUS
VARIANCE
NUMBERS

But not . . .

WHY IT MATTERS
WHAT CHANGED
UNCERTAINTY
THE DECISION

The report content may not be wrong.
It may be missing the meaning.

THE PROBLEM ISN'T THE QUESTION

PROBLEM	QUESTION	DECISION
Project X has no analyst. →	Which analyst should we allocate? →	Allocate, replan or escalate.

Start with the question, before asking what data is needed.

ESCALATION CHANGES THE QUESTION

PROJECT QUESTION

Which analyst can we allocate to Project X?

→

ESCALATED QUESTION

Which work must slow down, stop or lose capacity?

Different question = different decision rights

START WITH THE DECISION, NOT THE DATA

THE OLD ROUTE

Data → Chart → Pack → Meeting → Maybe a decision

THE BETTER ROUTE

Problem → Question → Evidence → Decision → Action

Start with the decision, not the data

WHAT LEADERS ACTUALLY NEED

- CLEAR QUESTIONS
- CLEARER INSIGHT
- EARLIER WARNING
- DECISION CONFIDENCE
- ACTION CLARITY

Not simply another status update

WHERE DOES THE CHAIN BREAK?



Data not trusted?
Information not understood?
Knowledge not acted upon?
Wisdom not applied?
Action not taken?

Find the weakest link and strengthen it before action

BEHAVIOURS MATTER

INTERPRET	CHALLENGE	CONNECT	ESCALATE
Say what it means	Test weak evidence	Link to outcomes	Surface issues early

Make poor decisions harder to sleepwalk into

THE SHIFT WE ARE ASKING PMOS TO MAKE

FROM	TO
Reporting as a broadcast activity	Reporting as decision preparation
“We sent the pack.”	“What do we do next?”

Not just a technical shift but a behavioural one

WHAT THIS MEANS FOR TODAY

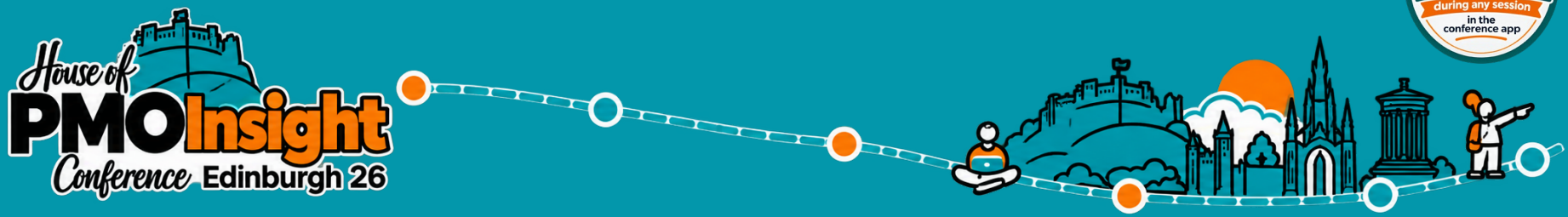
THIS MORNING	THIS AFTERNOON	TOMORROW
Find the reporting gap. Name the unsupported decision.	Use the Decision Canvas to redesign around decisions.	Test confidence, tools, AI and governance. Plan your next 90 days.

Your First Job – identify where the chain breaks

EXERCISE TIME

Table Exercise

Time to discuss, share and capture



20 MINS

Where Does Reporting Fall Short?

1 SHARE

Real reporting examples

2 DIAGNOSE

Trust · Meaning · Usefulness

3 AGREE

One gap to carry forward



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Where Does Reporting Lose Value?

20 MINS

TRUST

Can we rely on it?

MEANING

Do we understand why it matters?

USEFULNESS

Can someone act on it?

2 DIAGNOSE

Trust · Meaning · Usefulness



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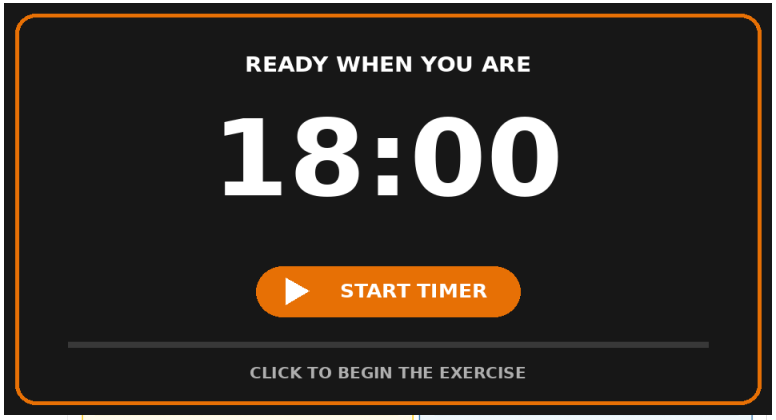
Before your table finishes

18 MINS

Agree ONE gap to carry forward.



Complete one A3 per table.

Upload a photo with your table number on the conference app



Then capture your own reflections in the workbook

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PMO Practitioner Reality Stories

Lucy, Pedro and Tanja



PMO of One: Using AI to Build the Foundations

Lucy Allen
Derbyshire Community Health Service NHSFT

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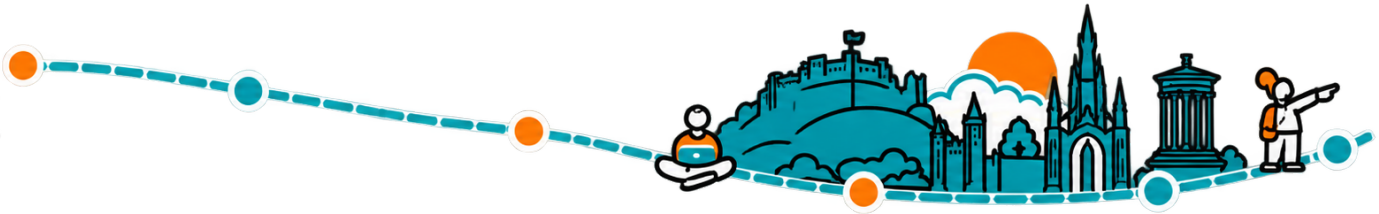


Start with the foundations, not the technology



- What infrastructure does the organisation need to manage change well?
- Start with the basics
- Roles and responsibilities
- Development process



Why business cases?

Why business cases?

A PMO shouldn't just help deliver projects better. It should also help organisations **make better decisions about which projects to start.**

Before we ask,
'How are we going to deliver this?'
we need the right answers...



Key questions a business case helps us answer

- What problem are we solving?
- Does it align with our strategy?
- What are the options?
- What will it cost?
- What are the benefits?
- Do we actually have the capacity to deliver it?

The challenges

- Business cases take time
- Information is often spread across different places
- Not everyone writes business cases regularly

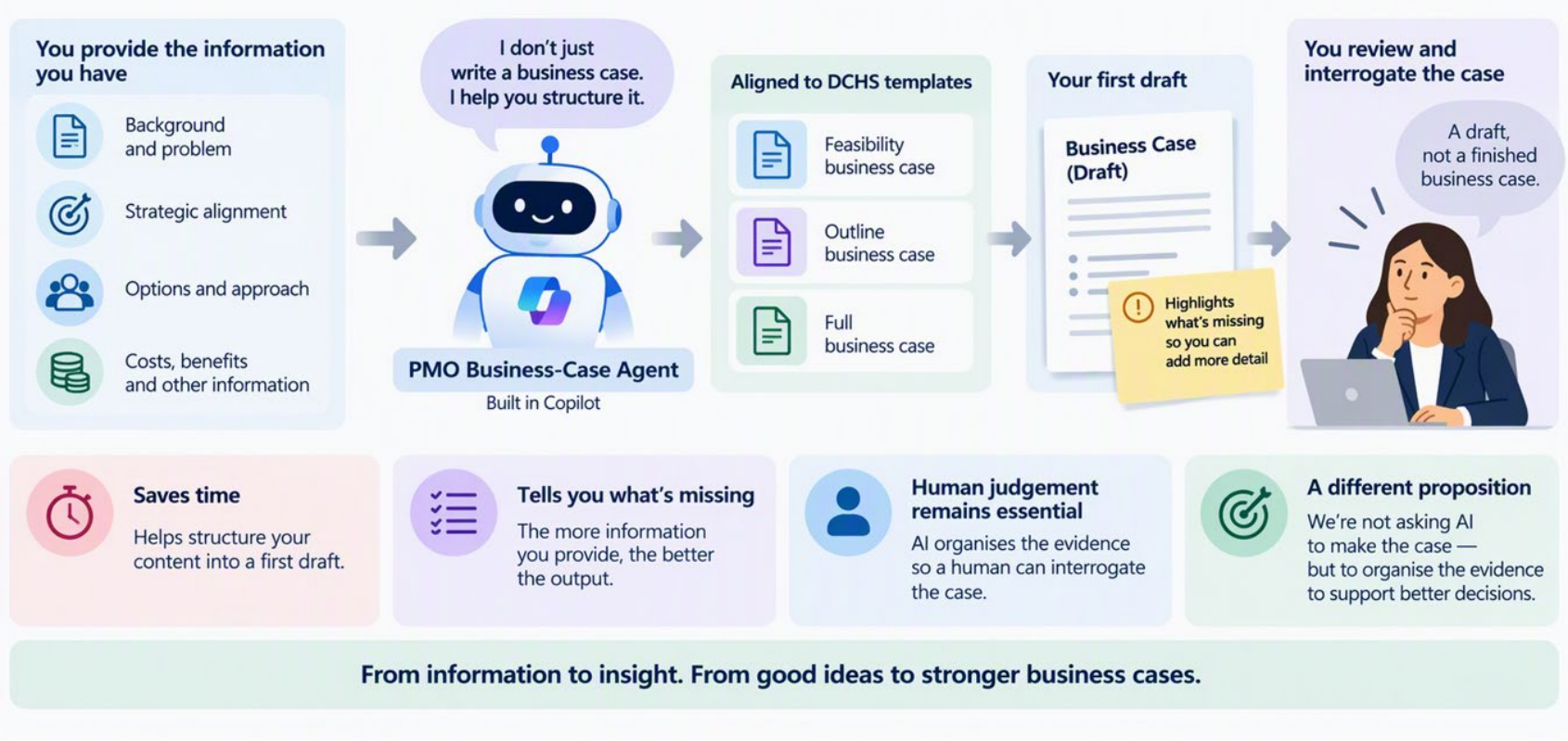
A practical application for AI

AI



From good ideas to the right decisions

Give AI the heavy lifting, not the decision



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AI creates thinking space

AI structures and highlights what's missing



Business Case (Draft)

Missing information

- No measurable benefit identified
- Baseline not available
- Evidence needed
- Expose the gap

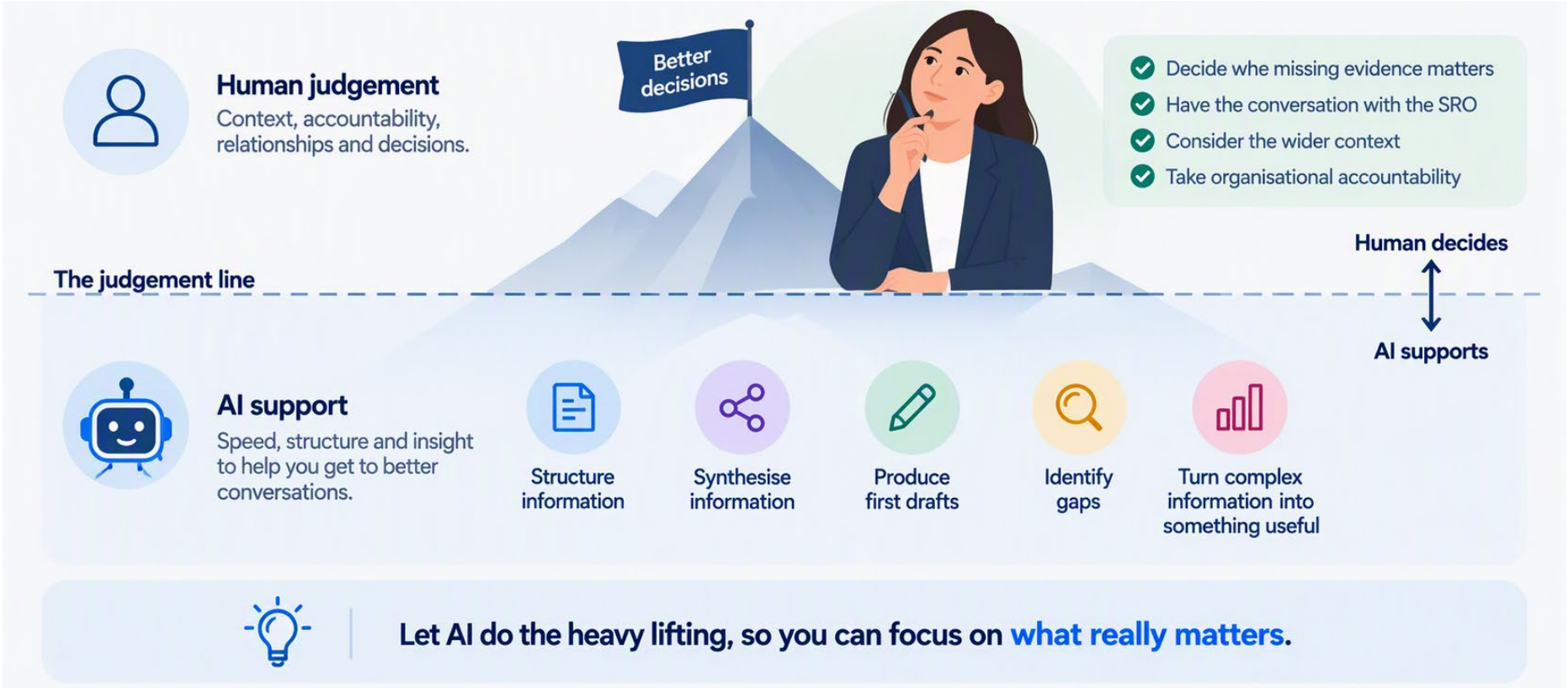
More time for what matters



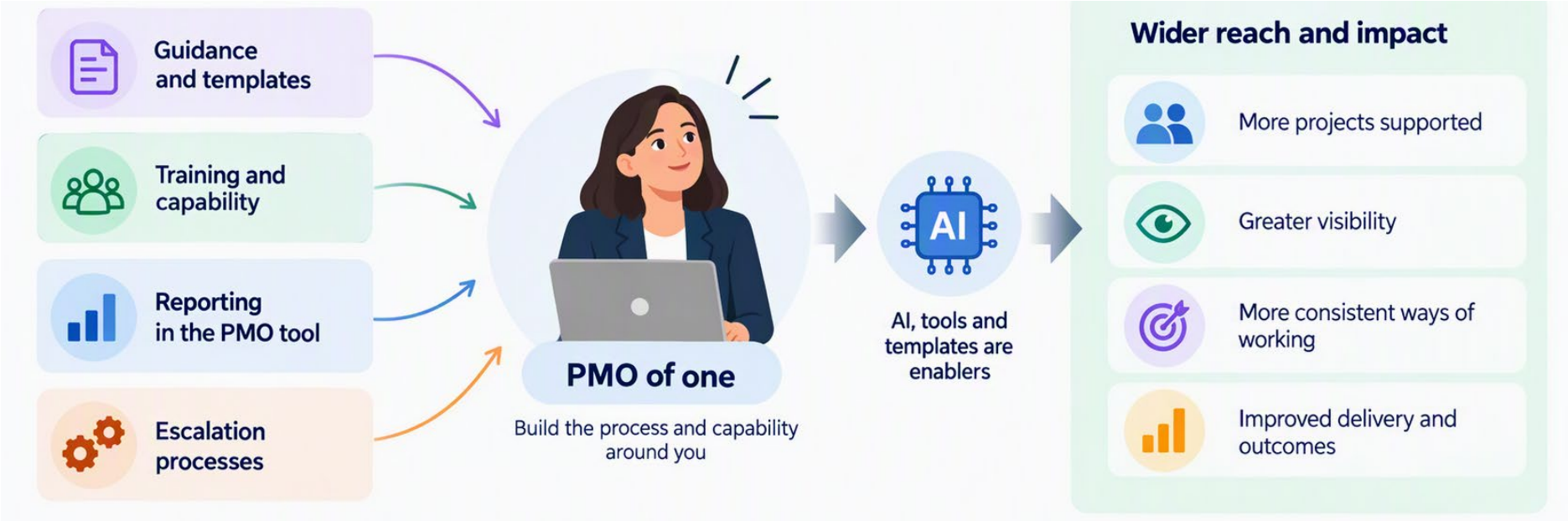
- Is this a convincing case?
- Have we considered the alternatives?
- Can we actually measure the benefit?
- Do we have the resources?
- What assumptions are we making?

Less time moving information. **More time for better decisions.**

AI below the judgement line



What does this allow a PMO of one to do?



What I have learnt



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AI PI ENTERPRISE DELIVERY ANALYSIS

What did AI reveal about our delivery performance?

Comparing delivery and RAID data before and after Program Increment

Pedro Oliveira | Agile Coach, NatWest

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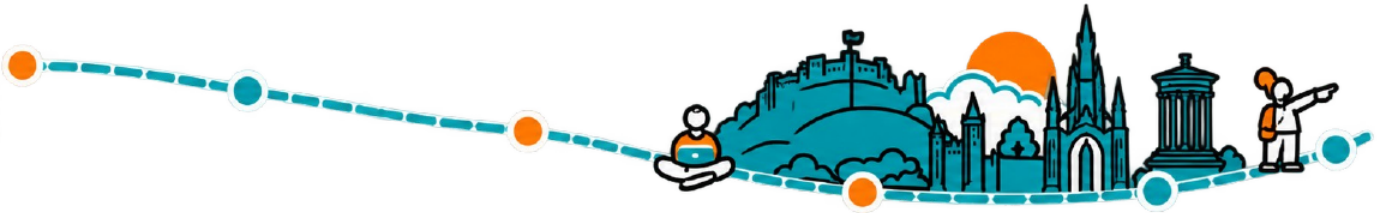

Five findings and one bigger picture

+90%

SCOPE EXPANDED

4,145 to 7,877 items

+50.7%

MORE DONE

533 to 803 completed

+15.9%

RAID GROWTH

Versus +47% delivery scope

228

DEPENDENCIES ACCEPTED

196 requested / contested

0

ASSUMPTIONS RECORDED

At either checkpoint

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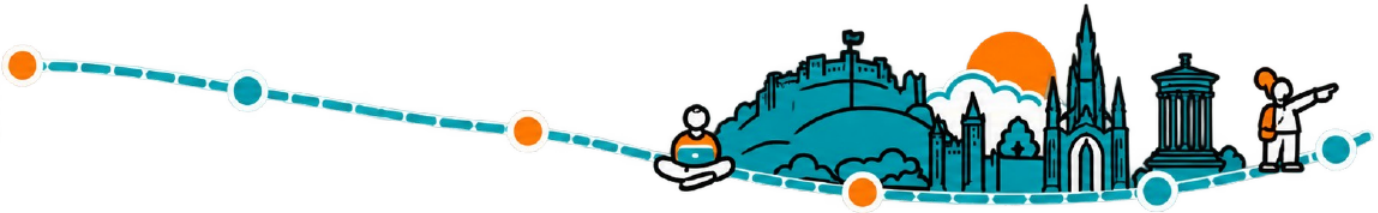


Pre and Post PI5 Comparison

Measure	Pre-PI5	Post-PI5	Change	Implication
Total tracked scope	4,145	7,877	+3,732 (+90.0%)	Significant elaboration, new intake, and additional enablement work.
Delivery scope	3,259	4,791	+1,532 (+47.0%)	More work was decomposed into executable increments during PI5.
Outcomes	9	9	0 (0.0%)	Strategic intent remained stable.
Portfolio epics	204	235	+31 (+15.2%)	Moderate growth in structural and enabling work.
Features	985	1,173	+188 (+19.1%)	Functional scope expanded in a controlled manner.
Stories	2,061	3,374	+1,313 (+63.7%)	High levels of story elaboration occurred during execution.
Done / Closed	533	803	+270 (+50.7%)	Throughput improved materially.
In Progress	450	708	+258 (+57.3%)	WIP and context-switching risk increased.
To Do / Open	2,276	3,280	+1,004 (+44.1%)	Backlog remains large relative to completed scope.
Total RAID	886	1,027	+141 (+15.9%)	Governance volume grew more slowly than delivery scope.
Dependencies	722	818	+96 (+13.3%)	Dependencies remain the dominant RAID category.
Risks	123	156	+33 (+26.8%)	Risk exposure increased with portfolio scale.
Issues	41	53	+12 (+29.3%)	More active remediation is required.
Assumptions	0	0	0	Formal assumption management is not embedded.

What did the analysis really show?

+50.7%

THROUGHPUT UP

Done items increased

+63.7%

STORY GROWTH

Scope kept expanding

68.5%

STILL TO DO / OPEN

Backlog pressure remained

708

IN PROGRESS

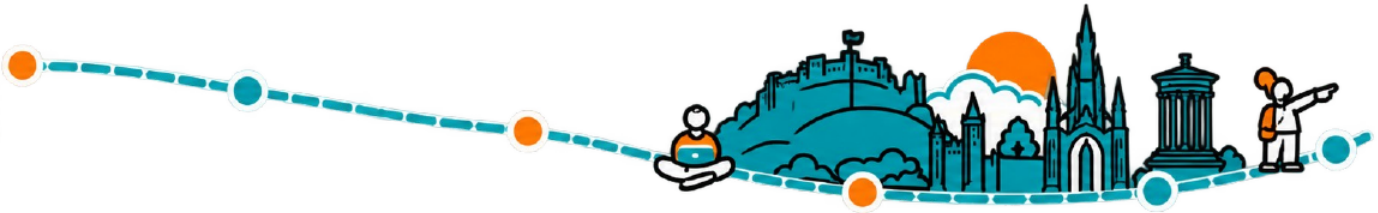
High WIP exposure

196

REQUESTED / CONTESTED

Dependencies still unresolved

More delivered — but scope influx, high WIP and cross-workstream dependencies constrained efficiency.



Workstream Analysis

Workstream	Post-PI5 delivery	Post-PI5 RAID	Assessment
Alpha	2,339	259	Largest delivery footprint, representing approximately 48.8% of delivery scope.
Delta	805	115	Delivery scope more than doubled, reflecting major platform and tooling expansion.
Beta	571	92	Relatively stable scope with controlled RAID growth.
Gamma	429	224	High coordination burden, although RAID-to-delivery balance improved.
Epsilon	165	15	Rapid proportional growth from a smaller baseline.
Zeta	83	76	Governance-heavy work remains a defining characteristic.
Eta	47	89	Dependency exposure remains disproportionately high relative to delivery.
Iota	243	38	New scope emerged during PI5, including gateway and agent-tooling work.

What did the AI suggest?

1. Control late scope additions
2. Finish more before starting more
3. Resolve dependencies earlier

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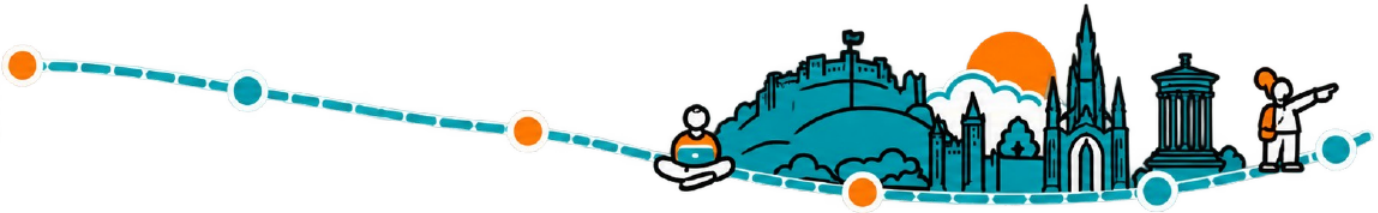

Team maturity: strong visibility, weaker control

STRONG

Backlog breakdown

RAID visibility

Work identified and tracked

DEVELOPING

Dependency commitment

Alignment still needed

NEEDS WORK

Scope control

Assumption management

Greater discipline required

The next step: from seeing the work to controlling how it flows.

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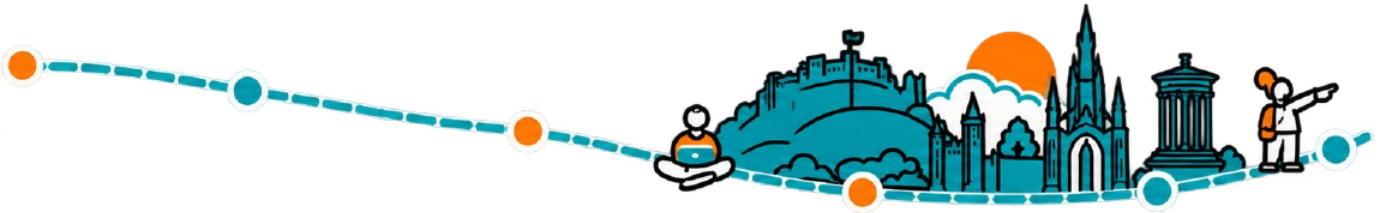

Team Maturity

The portfolio shows mature visibility and decomposition practices, but not yet mature flow control. Teams appear capable of identifying and structuring work, while governance is less effective at preventing late scope introduction or converting uncertainty into explicit assumptions.

Dimension	Assessment	Evidence
Backlog decomposition	STRONG	Clear hierarchy from Outcomes through epics, features, and stories.
RAID visibility	STRONG	Dependencies, risks, and issues are actively recorded at scale.
Dependency commitment	DEVELOPING	Accepted and Closed dependencies increased, but 86 remain Contested.
Scope control	NEEDS IMPROVEMENT	Delivery scope increased by 47.0% between checkpoints.
Assumption management	IMMATURE	No assumptions were formally logged.

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Four lessons worth taking away

01 **Commit dependencies early**

Before committing to delivery

02 **Separate discovery from delivery**

Refine the work before PI starts

03 **Make assumptions explicit**

Zero logged does not mean zero

04 **Sequence platform work sooner**

Foundations can become critical

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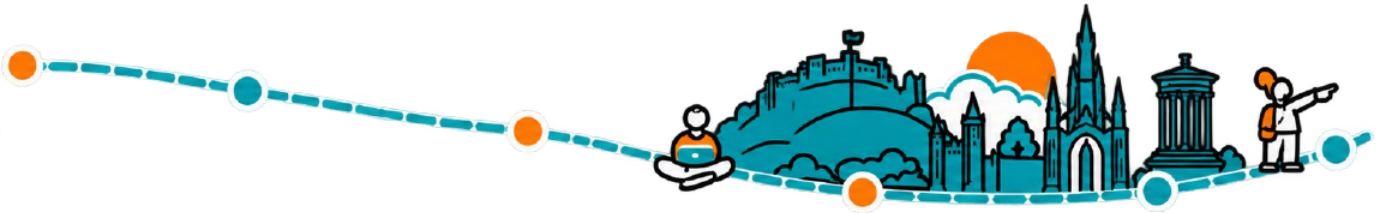


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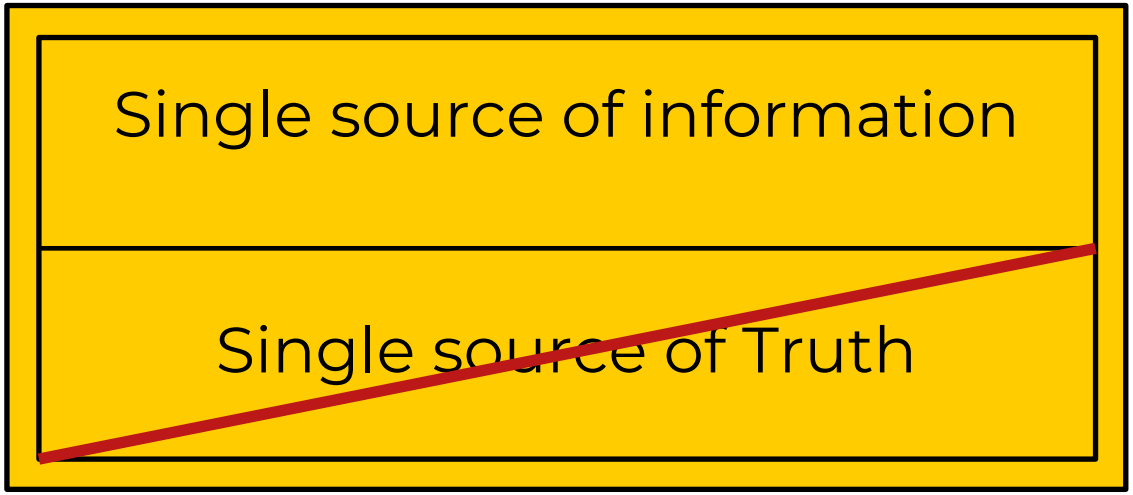

Tanja Mayer, PMO Manager, University of Glasgow

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Hi, I'm Tanja!

- PMO Manager for Glasgow University
- Working in Information Services
- PMO team of Seven
- Overseeing three portfolios
- My PMO Mindset: Enabling delivery through support of delivery teams



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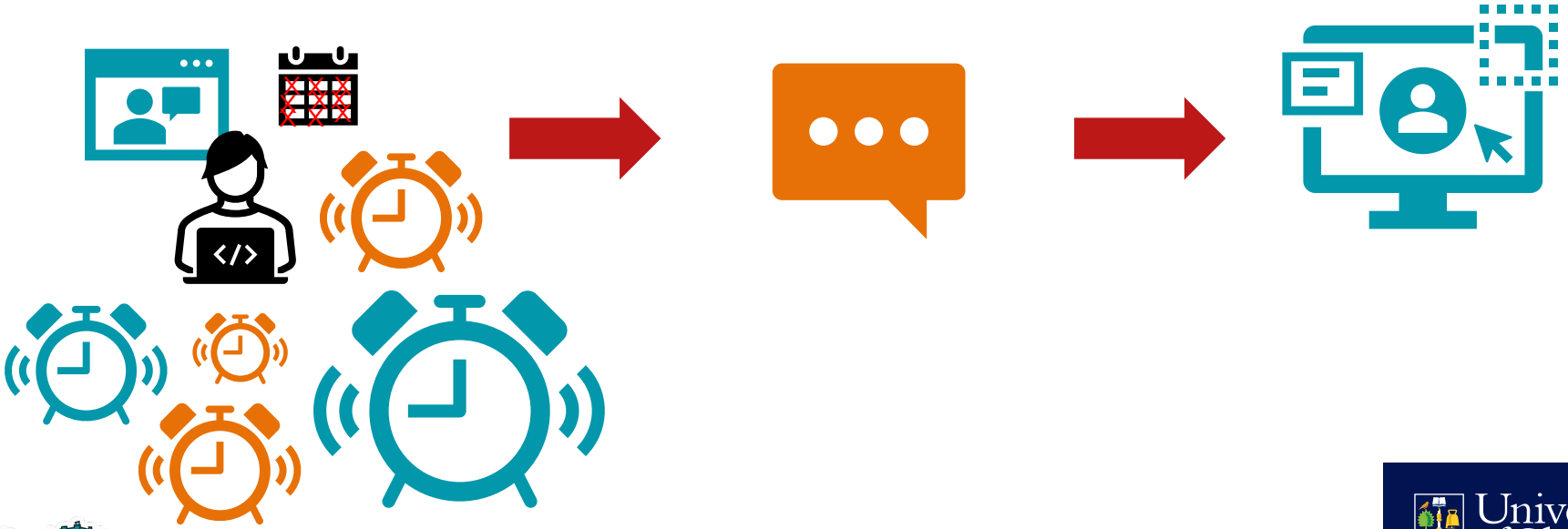
University of Glasgow

‘Who’s reading all that?’



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Core challenges

- Disordered reporting cadences
- Inconsistent use of PPM tool
- Duplication of (out-of-date) data
- No clear guidance around RAG and writing style



One baseline to inform them all

- One core monthly reporting pack
- Increased adoption of PPM tool
- Clearer guidance on RAG and writing style
- Less efforts for project teams



Consistent reporting voice for stakeholders

Things to...

...keep in mind

- Purpose over perfection
- Questions are ok
- Drive consistency of reports, not their delivery
- Clear process over 'Single source of truth'

...ask

- What's actually not working for us?
- Which questions are our reports supposed to provide answers to?
- What's our goal in providing these data points to our stakeholders?



Ensure you understand all of your team's current reporting commitments

IT'S LUNCH TIME

Meet the Partners

A chance to explore practical challenges

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Headline Partner
ProSymmetry

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This session will be starting shortly

Please take your seats

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Welcome Back

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A Real PMO Journey Towards Decision-Ready Insight

Sarah Landen, PMO & Portfolio Manager
Bristol Airport



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Beyond the dashboard

How better insight changed how we approach investment



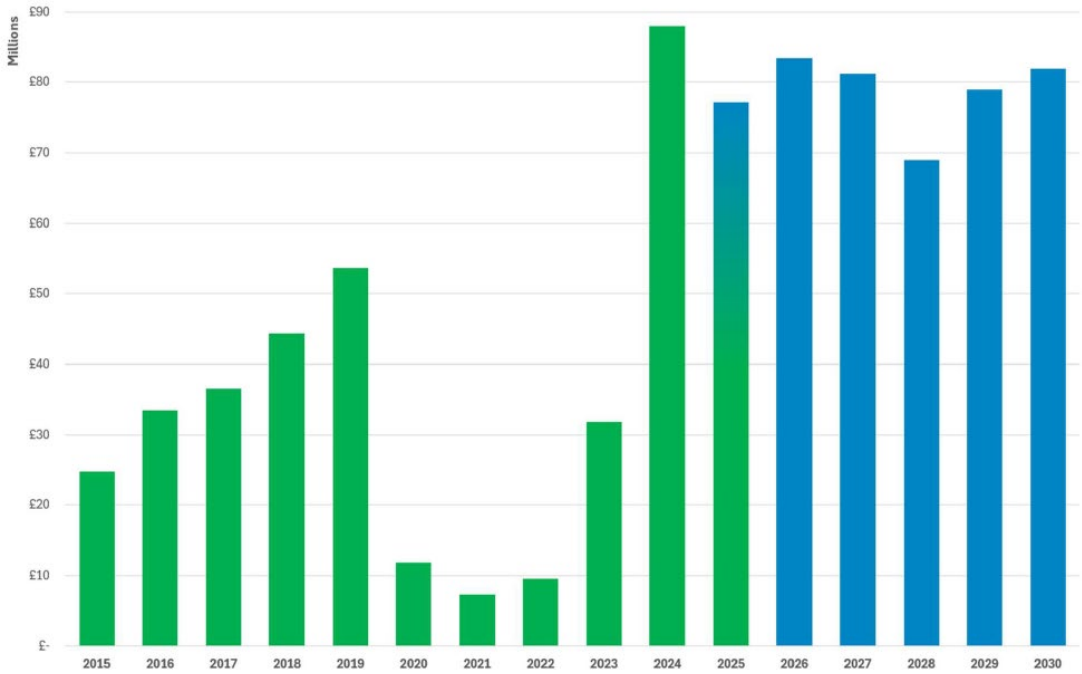
Investment scale changed our leadership challenge

Accelerated growth and responding to external factors has changed our question from

“is each project managed?”

to

“is this the right portfolio?”



The portfolio looked healthier project by project

Every project looked healthy

The portfolio did not

The risks sat between projects: shared capacity, operational windows, dependencies, affordability and reputation

Year-end cost forecast

£15m

behind budget

In-year strategic benefits

7 of 25

not being achieved



Project portfolio dashboard — **All green**

Project	Cost	Schedule	Benefits	Risk
Terminal Upgrade	●	●	●	●
Baggage System Renewal	●	●	●	●
Airfield Resurfacing	●	●	●	●
Security Lane Expansion	●	●	●	●
Surface Access Scheme	●	●	●	●
Car Park Digitalisation	●	●	●	●

● Green = on track

Illustrative project names

A project can stay green while its value turns red

MILESTONES	COST	SCOPE
on track	within approval	delivered

BENEFITS	WHOLE-LIFE COST	ADOPTION
weakening	rising	not ready

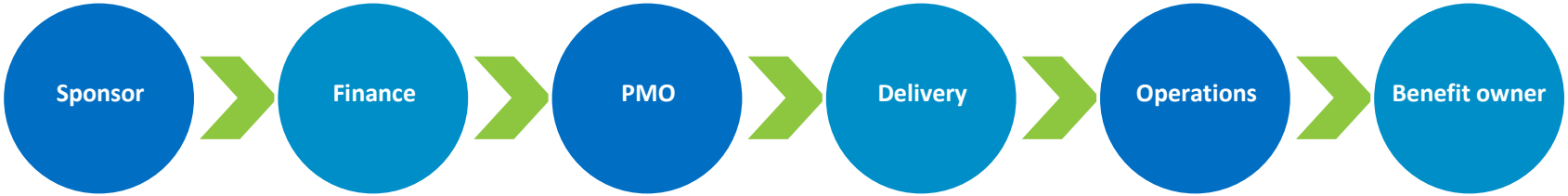
Time, cost and scope are necessary, but they are not value assurance

The line of sight was fragile

Value had to survive every handover

Strategy → business case → scope → delivery → adoption → outcome

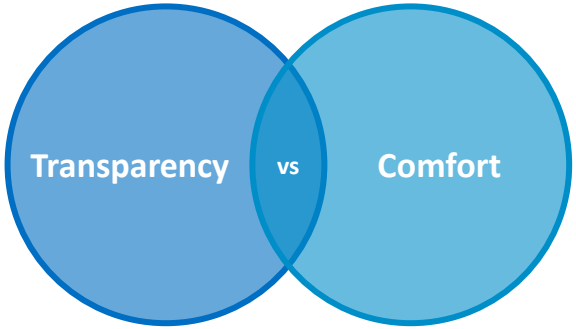
And no one owned the whole line

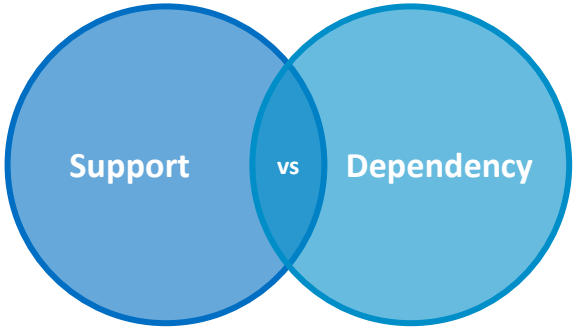


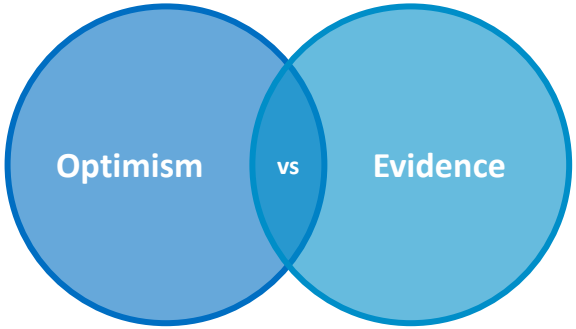
Clear roles did not automatically create collective ownership of the outcome

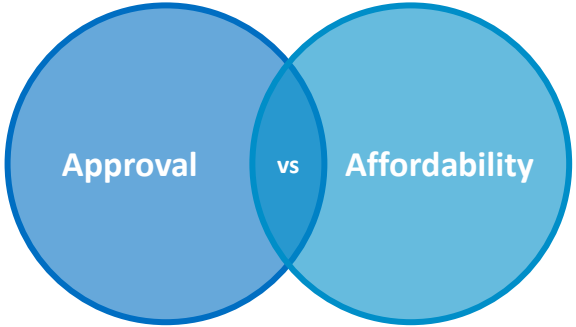
The messy middle was not a data problem

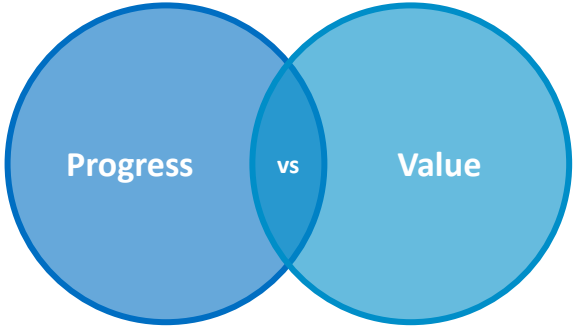
It was a set of leadership tensions

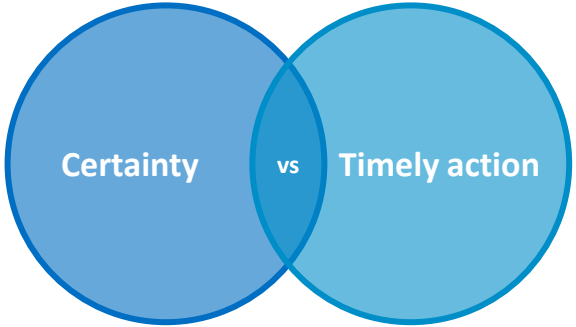








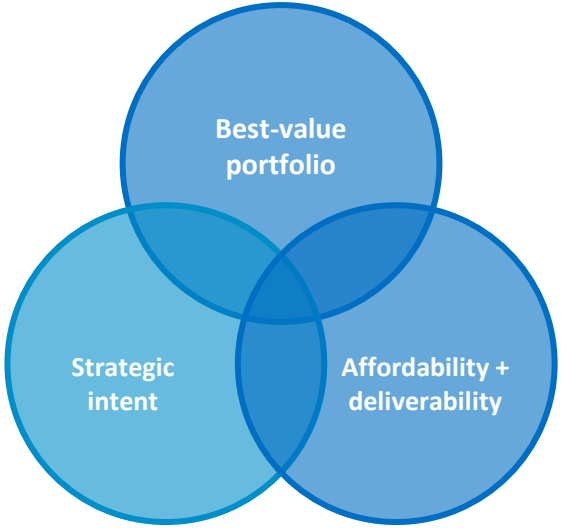




“It supports the strategy”

is not a prioritisation decision

If every proposal supports the strategy, what differentiates them?



What value will the next £1m buy?

Every new priority displaces something

IDEA — Create a case

PLAN — Align delivery

BUILD — Invest

DELIVER — Realise outcomes

PROVE — Show value

DEFER another scheme

REDUCE scope elsewhere

ADD capital

OVERLOAD delivery capacity

INCREASE portfolio risk

Resources dashboard — Stretched

Project	Resources
Terminal Upgrade	Red
Baggage System Renewal	Amber
Airfield Resurfacing	Red
Security Lane Expansion	Amber
Surface Access Scheme	Amber
Car Park Digitalisation	Red

Red = shortfall Amber = at risk

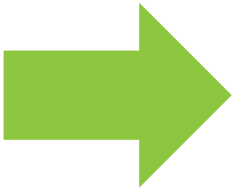
Illustrative project names

Approving without identifying displacement is accumulation, not prioritisation

We had to be the people who converted reporting into insight

AS-IS
Making the report work

- CHASE
- COMPILE
- RECONCILE
- EXPLAIN



Capability shift

TO-BE
Making the insight count

- CONNECT
- INTERPRET
- CHALLENGE
- RECOMMEND
- FOLLOW THROUGH

The capability shift was as important as the reporting shift

Effective leadership made insight usable

The PMO exposes the trade-off

Leadership owns the choice

Is it better than the alternatives?

What is the cost of waiting?

Are the original outcomes still valid?

What will this displace?

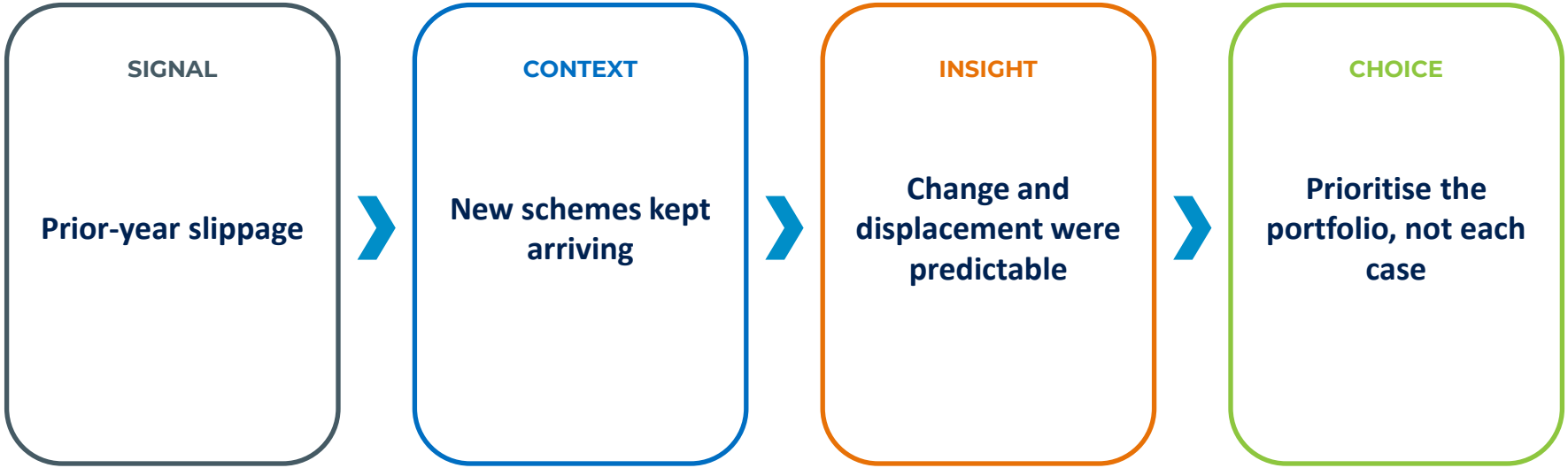
Who owns the outcomes?

When would we stop?

What value will the next £1m buy?



The capital plan stopped being a list



Which combination of projects creates the strongest outcomes and value within the constraints we actually have?

The benefit was not the dashboard

Earlier visibility

Clearer trade-offs

Stronger challenge

Better-timed intervention

Insight extract: Terminal Upgrade — Resources amber ↓

- (A) **Hold:** no change - absorb and accept slippage
- (B) **Re-phase:** delay non-critical work
- (C) **Re-prioritise:** move resource from other projects

Recommend C: re-prioritise to protect delivery

Follow-through: Surface Access Scheme decelerated and re-baselined - resources diverted to Terminal Upgrade

Portfolio dashboard: all parameters — 2 red — 3 amber

Rank	Project	Cost	Schedule	Benefits	Risk	Resources	Flag
1	Terminal Upgrade	● ↓	● →	● ↓	● →	● ↓	⚑
4	Baggage System Renewal	● →	● ↓	● →	● →	● →	⚑
2	Airfield Resurfacing	● →	● ↓	● →	● ↑	● →	⚑
5	Security Lane Expansion	● →	● ↑	● →	● →	● ↓	⚑
6	Surface Access Scheme	● →	● →	● ↑	● →	● →	
3	Car Park Digitalisation	● →	● →	● →	● →	● ↓	⚑

Green = on track · Amber = at risk · Red = off track · Illustrative data

↑ Improving · → Stable · ↓ Worsening · ⚑ Red + worsening · ⚑ Amber + worsening

Is this the best use of our money and capacity?

How we do it today: weighted strategic value, combined with value for money efficiency

1 Weight strategic value

Weightings replace equal scoring. Schemes that previously tied are now separate.

2 Add value for money

Value score per £m of capex. Lower-investment schemes with greater strategic value rise above the big shiny schemes.

3 Combine strategy and efficiency

Course correct where required by adjusting the balance between the two.

Option	Strategic	Value for money	When to use
Strategic-led	70%	30%	Delivering strategy, resilience, safety or compliance
Balanced	60%	40%	Good default for capital prioritisation
Efficiency-led	50%	50%	Affordability is severely constrained
Cost-pressure	40%	60%	Maximise output from limited funding, e.g. a major challenge

From delivery assurance to value assurance

Is this still the best use of our investment and resources?

Strategy → Prioritisation → Investment → Delivery → Adoption → Outcome → Learning



Thank you

Questions?





Scan to connect on LinkedIn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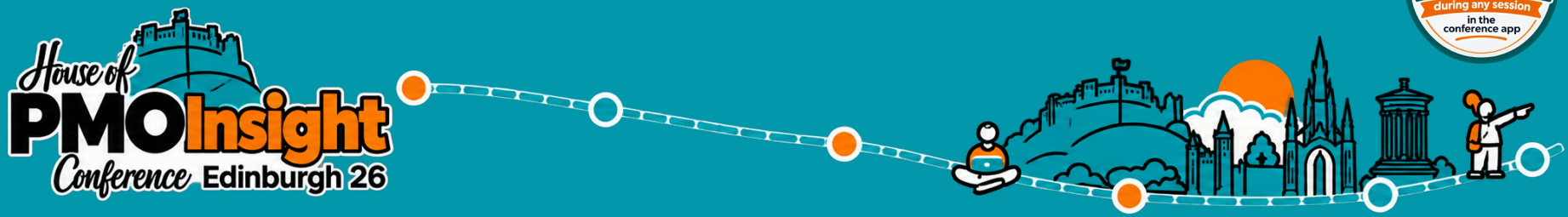
EXERCISE TIME

Table Exercise

Time to discuss, share and capture



DECISION CANVAS

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Decision-First Reporting: Using the Decision Canvas

Eileen J Roden
House of PMO



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WHAT IS A CANVAS?

A visual framework for structured thinking







STRUCTURE

DISCUSSION

VISIBILITY

A canvas helps us think things through – it doesn't provide the answers.
The Decision Canvas helps us ask: "What needs to be in place to enable the best decision to be made?"

THE DECISION CANVAS

Supports the PMO Role

What needs to be in place to enable the best decision to be made?

THE DECISION CANVAS

Evidence and Insight

What do we know and how reliable is it?

Context and Connections

What does this decision affect or depend on?

People and Stakeholders

Who is involved, affected or needed?

DECISION

Governance and Accountability

Who decides, and under what governance

Judgement and Confidence

Where is judgement required, and how confident are we?

Capabilities and Enablers

What tools, skills or support are needed

THE DECISION CANVAS

DECISION

- Evidence and Insight
- Context and Connections
- People and Stakeholders
- Governance and Accountability
- Judgement and Confidence
- Capabilities and Enablers

How to Complete	Quality Checklist
Identify the underlying problem	A decision, not a problem
Clarify what needs deciding	Clear and specific choice
Establish scope and decision level	Doesn't assume the answer

THE DECISION CANVAS



- Evidence and Insight
- Context and Connections
- People and Stakeholders
- Governance and Accountability
- Judgement and Confidence
- Capabilities and Enablers

How to Complete	Quality Checklist
Identify information needed	Relevant to decision
Review available information and sources	Reliability and limitations understood
Distinguish between what is fact and assumptions	Does it help differentiate options

THE DECISION CANVAS



- Evidence and Insight
- Context and Connections
- People and Stakeholders
- Governance and Accountability
- Judgement and Confidence
- Capabilities and Enablers

How to Complete	Quality Checklist
Identify wider organisation implications	Look beyond the immediate problem
Explore dependencies and constraints	Important connections are visible
Consider consequences and trade offs	Wider impacts are understood

THE DECISION CANVAS

DECISION

- Evidence and Insight
- Context and Connections
- People and Stakeholders
- Governance and Accountability
- Judgement and Confidence
- Capabilities and Enablers

How to Complete	Quality Checklist
Identify who is affected	All relevant perspectives considered
Establish whose input matters	Involvement has a clear purpose
Identify necessary conversations	Engagement happens before the decision

THE DECISION CANVAS



- Evidence and Insight
- Context and Connections
- People and Stakeholders
- Governance and Accountability
- Judgement and Confidence
- Capabilities and Enablers

How to Complete
Identify the accountable decision-maker
Establish applicable governance arrangements
Clarify escalation requirements and triggers

Quality Checklist
Decision authority is clear
Within delegated authority and tolerances
Escalation boundaries are understood

THE DECISION CANVAS

DECISION

- Evidence and Insight
- Context and Connections
- People and Stakeholders
- Governance and Accountability
- Judgement and Confidence
- Capabilities and Enablers

How to Complete	Quality Checklist
Identify where judgement is required	Uncertainties are made visible
Explore assumptions and uncertainties	Confidence is proportionate to significance
Consider alternative interpretations and perspectives	Evidence and assumptions are challenged

THE DECISION CANVAS

DECISION

- Evidence and Insight
- Context and Connections
- People and Stakeholders
- Governance and Accountability
- Judgement and Confidence
- Capabilities and Enablers

How to Complete	Quality Checklist
Identify skills and expertise needed	Capabilities support the decision
Consider tools, processes and resources	Not just a technology solution
Identify missing support or capability	Support is realistic and proportionate

ARE YOU DECISION READY?

What is ready?	What needs strengthening?	Where are the boundaries?
What already feels strong enough to support the decision?	What is weak, missing or unclear?	What trade-offs, limits or escalation points matter?

EXERCISE TIME

Table Exercise

Time to discuss, share and capture



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20 MINS

Using the Decision Canvas

1. **IDENTIFY A DECISION**
2. **WORK THROUGH EACH ELEMENT**
3. **IDENTIFY AREAS FOR IMPROVEMENT**



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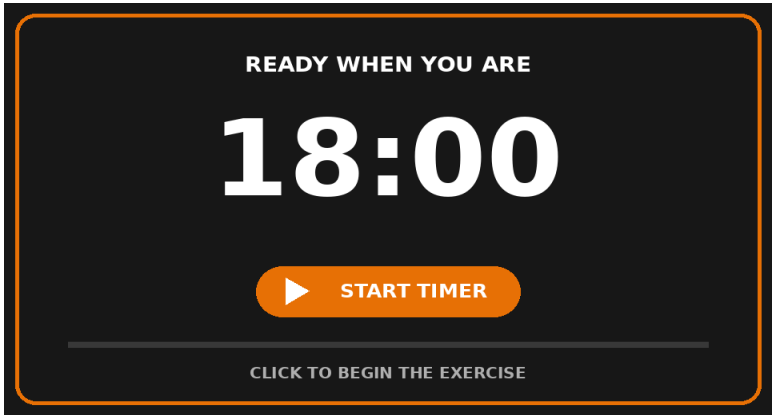
Before your table finishes

18 MINS

REFLECT ON WHICH ELEMENT WAS MOST DIFFICULT TO COMPLETE.



Complete one A3 per table.

Upload a photo with your table number on the conference app

Then capture your own reflections in the workbook





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TIME FOR A BREAK!

Coffee & Clinics

Speak to the experts in the Partner Insights Studio

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Headline Partner
ProSymmetry

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Share timeline wall



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Time for Provocations

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Insight Partner Provocations



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Lightning Talks

- Short, sharp and designed to get us thinking!
- Each speaker has just 5 minutes and one slide
- Each will share a provocation - something they've noticed, a challenge they keep seeing across organisations, or an assumption they think PMOs should question.



YOU CAN'T PRIORITISE WORK WITHOUT PRIORITISING PEOPLE'S TIME

01 **Think of the person everyone is waiting on.**

How many projects—and BAU commitments—depend on their time?

02 **A ranked portfolio doesn't resolve competing demands on people.**

Make their real commitments visible. Agree what moves.

03 **What have we explicitly agreed they can stop or delay?**

Take that question back to your team on Monday.

ProSymmetry

POWER FRAMEWORK

Your PMO has a reporting problem. Or does it have a data problem?

PMOs invest heavily in dashboards, reporting and visualisation

But the underlying information remains fragmented, inconsistent and manually maintained.

Transformation comes from capturing information once, maintaining it in a structured way and making it reusable across processes.

“How much manual effort does it take to produce monthly reports?”

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Airport Lounge
Departures
Gates A1 – A18
Flight Information
FIRST-CLASS EXPECTATIONS
Better insight
Smarter decisions
AI and automation
Strategic influence
ECONOMY-CLASS REALITY
Excel and PowerPoint
Disconnected data
Limited access to PPM tools
More expected, less support
THE PEOPLE UPGRADE
Knowledge
Skills
Behaviours
Confidence and opportunities to practise
Everyone's Talking About Upgrading the PMO – but Who's Getting the Upgrade?
Are we raising expectations faster than we're developing our PMO people?
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AI TRANSFORMATION // THE CORE QUESTION

Be AI Ready: How do we prepare our future PMO?

Hypothesis: AI readiness is an operating-model question, not a tooling question. Strengthen the PMO foundations first, and AI scales impact instead of misalignment.

AI AMPLIFIES WHAT YOU HAVE

Mirror
Reflects the assumptions and patterns already in your organisation

Multiplier
Magnifies the quality, or weakness, of your inputs

Accelerant
Shortens the path from analysis to action, right or wrong

FOUR FOUNDATIONS TO GET READY

1	**Clear strategy**	Fund the right bets; AI speeds up weak priorities.
2	**AI-ready data**	Fragmented data limits what AI can decide.
3	**Decision rights**	Agents work within budgets, authority and audit trails.
4	**Outcome measurement**	Measure delivered value, not AI activity.

PMO TARGET STATE
Orchestrator, not status clearinghouse
Sets outcomes and guardrails for people and AI agents

WHY IT MATTERS

95%
of GenAI projects fail

<10%
of AI transformations reach production scale

Start now: Run a Future-Ready PMO Assessment, then fix one foundation this quarter.

“Is our PMO ready to turn AI activity into strategy delivery and measurable business impact?”

Stop outsourcing the PMO!

HOT PMO

Strategy

Longevity

Connectivity

“What knowledge and capability should be kept in-house?”

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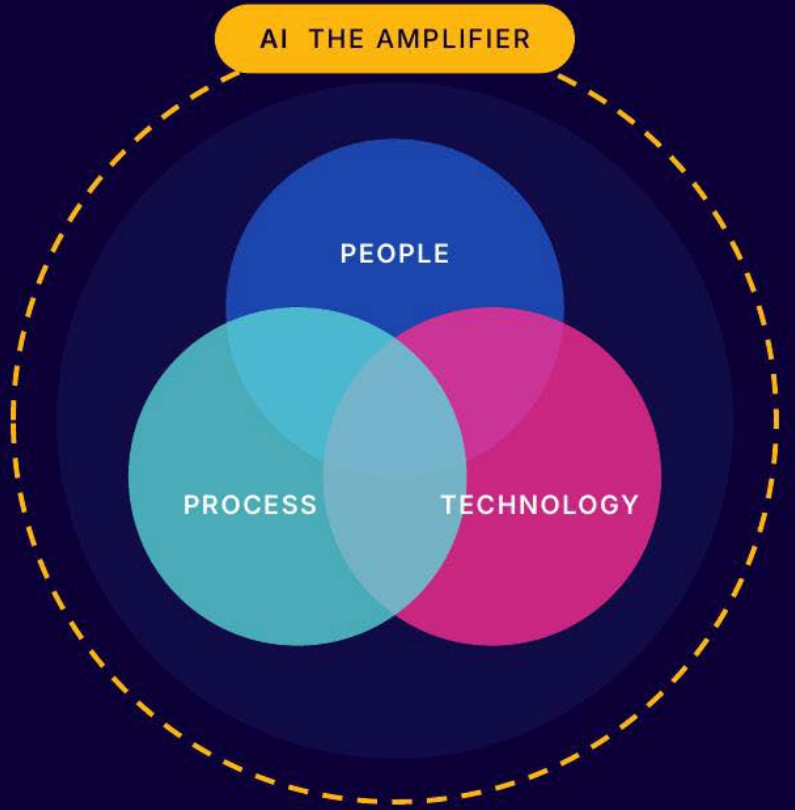
VERTO | HOUSE OF PMO

AI isn't your problem. Your PMO might be.

If AI does the reporting, what is your PMO actually for?

5-MINUTE PROVOCATION

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Keep Yourself Refreshed!

Help yourself to drinks throughout the sessions

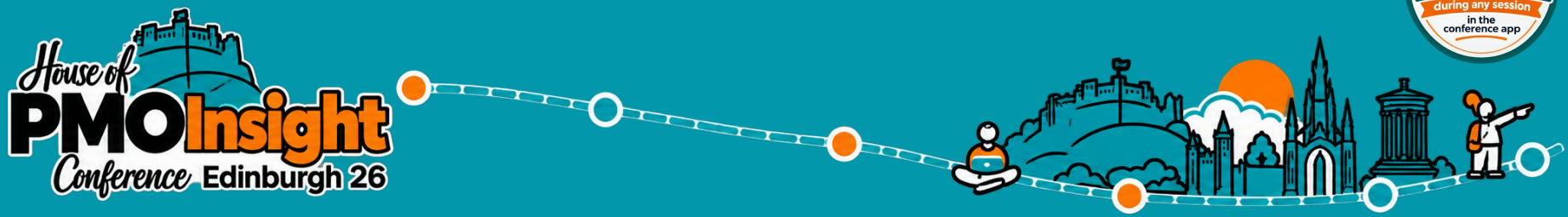
AVAILABLE IN THE CATERING AREA



EXERCISE TIME

Table Exercise

Time to discuss, share and capture



A Practical Challenge

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From Knowledge to Wisdom: Building the Decision Story

Cara Thompson / Building Stories with Data



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Add Slides

- https://cararthompson.github.io/pmo-insights/slides/pmo-insights.html#/title-slide



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Day One
That’s a Wrap!

What has changed in your thinking today?

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What's Different Now?

Take a few moments to have a look through the end of day one questions (pages 39 and 40!)

END OF DAY ONE

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One Question for Tomorrow

1. What would you like to ask the panel about tools and technology for the PMO?

Add your question to the app



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END OF DAY ONE

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But we're not finished yet . . .



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This session will be starting shortly

Please take your seats

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Welcome to Day Two

PMO Insight Conference

From Reporting to Insight
Building the Decision-Enabling PMO

Lindsay Scott and Eileen J Roden

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Kicking Off Day Two

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What Did Day One Tell Us?

Eileen J Roden
House of PMO



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What Did Day One Tell Us?



Eileen J Roden
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Evidence from the Table Exercises

New Questions · Challenges to take forward

REPORTING – THE STARTING POINT

The reporting issue may begin before the report exists.

THE FAMILIAR TASK

Produce the pack.
Update the template.
Meet the deadline.

THE DELEGATE CHALLENGE

What question are we answering?
Who needs it?
What decision follows?

THE NEW INSIGHT

Reporting requirements are a decision-support problem, not simply a data request.

Tables raised questions about purpose and audience.

REPORTING - KEY ISSUES

Themes evident in the 13 table outputs



Underlying Challenge: are we trying to fix reports when the gap is in decision-making?

REPORTING – BROADER CHALLENGE

BEFORE

A report is commissioned without a clear question or audience.

Example: fixed templates and vague reporting requirements.

DURING

Information is too long, stale or hard to interpret.

Example: the 300-page pack and out-of-date status.

AFTER

The PMO may not be in the room; decisions and actions go nowhere.

Example: escalation with no response.

A better dashboard would not solve all three.

REPORTING – BROADER CONTEXT

A project question became an organisational trade-off.

THE INITIAL QUESTION

Can this project proceed?
Who can we allocate?
Do we continue?

THE WIDER QUESTION

What must slow down elsewhere?
Who can accept the trade-off?
What are the consequences?

Delegates surfaced priorities, capacity, dependencies and governance authority.

DECISION READY?

We could list the ingredients . . .

WHAT IS READY?

- Existing project, cost and resource information.
- Established governance and approval routes.
- Available expert knowledge and professional experience.
- Known dependencies and organisational priorities.

WHAT NEEDS STRENGTHENING?

- Reliability of resource and capacity figures.
- Evidence behind estimates, forecasts and assumptions.
- Visibility of dependencies and competing priorities.
- Clarity about decision ownership and accountability.
- Capability to interpret information and apply judgement.

WHERE ARE THE BOUNDARIES?

- Financial and regulatory constraints.
- Delegated authority and governance limits.
- Stage-gate requirements and assurance conditions.
- The point at which decisions require escalation.
- Consequences for other projects when resources are reallocated.

DECISION READY?

We could list the ingredients . . .

WHAT IS READY?

- Groups could identify available inputs, but it was less clear whether they considered those inputs *sufficient* to support the decision.

WHAT NEEDS STRENGTHENING?

Do FTE figures actually reflected how busy people were. The data might be correct, but was it showing the capacity that mattered for the decision?

WHERE ARE THE BOUNDARIES?

Could a project proceed when assurance was incomplete? Risk of proceeding, the risks of delaying and who has authority to accept the remaining risk.

...but were we ready to judge whether the decision was ready?

AND ACTION!

An action agreed is not an action delivered.

DECISION

The forum agrees what should happen.

ACTION LOG

An owner and action are recorded.

DELIVERY PLAN

Capacity, dependencies and effort are scheduled.

WHAT NEEDS TO CHANGE

1 DEFINE THE DECISION

Ask what question a report supports.

2 TEST SUFFICIENCY

Agree evidence quality proportionate to risk.

3 CLARIFY AUTHORITY

Know who can decide and challenge.

4 MAKE ACTION REAL

Plan and resource what is agreed.

SO, FOR TODAY . . .

DATA CONFIDENCE

When is evidence good enough for this decision?

TOOLS & AI

What will technology fix — and what won't it?

PEOPLE & GOVERNANCE

Can we question, justify and act on the evidence?

YOUR NEXT 90 DAYS

What one change will make decisions easier?



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From Reporting Office to Decision-Enabling PMO

David Rollo / Rumo Intelligence

Ask a Question during any session in the conference app

Three people in this room



Gordon

PMO Analyst

Three days a month chasing returns for a pack nobody argues with.

“Is AI coming for my job?”



Aisha

PMO Manager

Sees the pattern, but her sponsors want green.

“Why do my reports keep turning into watermelons?”



Fiona

Head of Portfolio Office

Her exec committee wants answers, and the PMO has to prove its value.

“Can we afford all of this at once?”

72% **spend half a day or more every month just collating reports.**

Wellingtone, State of Project Management 2026. Gordon, Aisha and Fiona are composites.

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Where does your PMO spend most of its week?

A



Reporting PMO

Data + Information · Gordon

B



Insight-led PMO

Knowledge · Aisha

C



Decision-enabling PMO

Wisdom + Action · Fiona

Hands up, then circle one on page 46. Pick where your team spends most of its week, not your best day.

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Same portfolio, three conversations



Gordon

"14 green, 5 amber, 2 red. Three returns still outstanding."

The meeting asks: Is it green? Who hasn't submitted?



Aisha

"Four of the five ambers wait on the same data team. Third month running."

The meeting asks: Why? What links these?



Fiona

"Move the CRM upgrade back a quarter and the regulatory date is safe. We recommend option 2. Your call, by Friday."

The meeting asks: What do we stop, start or delay?

The conversation is the tell.

If your steering meeting only asks what colour things are, the PMO is still just reporting.

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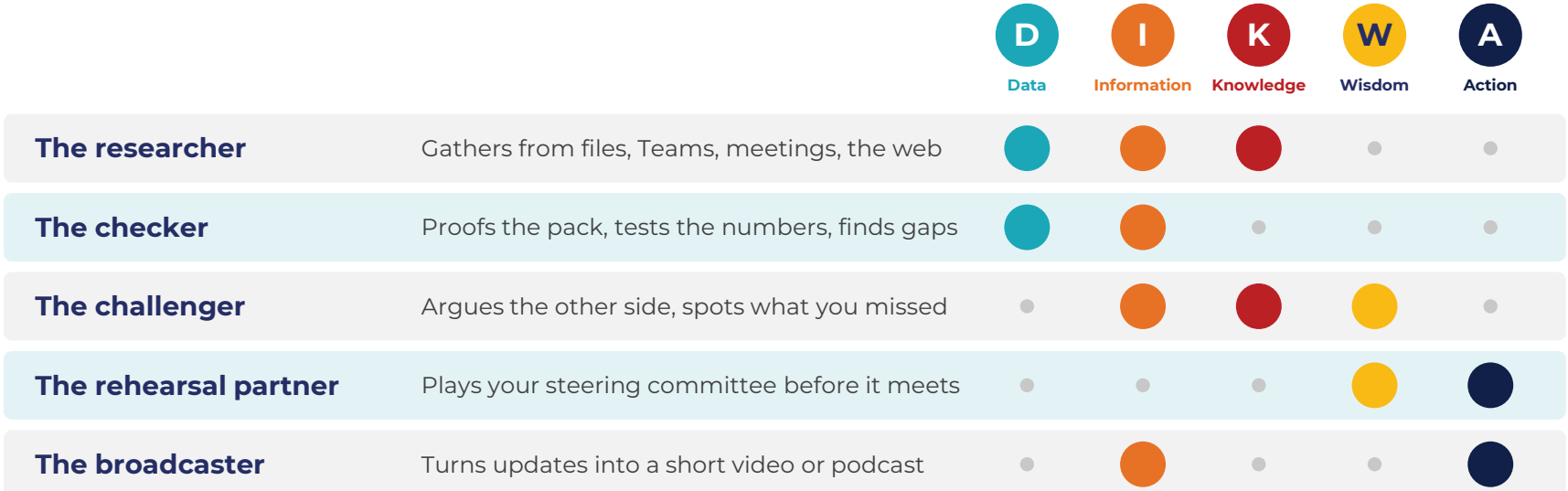
A new team just joined your PMO



Brief it like any new joiner.

Who you are, how you work, what matters here.

What it doesn't have: your organisation's context. That stays with you.

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Gordon: it gathers, he checks

Data and information: the pack drafts itself

Attached: 21 status returns · RAID log · last month's pack

> Turn this week's status returns into a one-page portfolio view. What changed since last month?



Gordon

PMO Analyst

+ researcher, checker

Gives him back

Three days a month of chasing and collating

My version

Briefed before any exec meeting in 10 minutes, not an hour-plus

Still his

Check it. It only knows what he gave it.

Workbook p.46 · Prompt 3 Capabilities & Enablers

Which part of your problem could genuinely be improved by technology?

Ask a Question
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Aisha: ask it to disagree

Knowledge: spot the pattern across the portfolio

Attached: RAID logs for 21 projects · last 3 months of steering minutes

What do the amber projects have in common? Look across the RAID logs and the minutes.



Aisha

PMO Manager

+ checker, challenger

Gives her

The pattern across 21 logs, and angles she hadn't thought of

Watch for

21 green reports in, “green” out. Ask it to argue the opposite.

Her line to the sponsor

“It's green, provided the data team is funded by March.”

Workbook p.46· Prompt 2 People & Stakeholders

Who needs confidence in the evidence, and what would create that confidence?

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Fiona: rehearse the room

Wisdom: rehearse the steering committee

Attached: Options paper · portfolio view · last 3 steering minutes

Play my steering committee: finance, risk and the sponsor. What will each ask about this paper?

The real question: **“Can we afford all of this at once?”**



Fiona

Head of Portfolio Office

+ rehearsal, broadcaster

Gives her

Their questions before they ask them, and the message tailored to each person

Shows her

What's missing from the pack, while there's still time

Still hers

The politics and the appetite for risk. Not a better pack: a better decision.

Drives, informs, never makes the call

The PMO	The accountable owner
Frames the decision	Chooses
Says how sure the evidence is	Accepts the risk
Lays out the options	Owns the outcome
Challenges	
Recommends	
Follows it through	



AI creates the capacity and the headspace. The PMO brings the judgement.

Signs you've crossed the line: the recommendation becomes the decision by default; uncertainty disappears from the pack; an AI output is presented as fact.

Workbook p.46 · Prompt 1 Judgement & Confidence

What uncertainty do you need to make visible rather than eliminate?

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Start with your next meeting

1. **Brief me** “From the status returns, the RAID log and the last minutes: what changed, and what needs a decision? Show your sources.”

2. **Challenge it** “Every report here says green. Argue the opposite. What would have to be true for this to be amber?”

3. **Rehearse it** “Play my steering committee: finance, risk and the sponsor. What will each ask, and what evidence am I missing?”

Three rules

Brief it like a new joiner · Ask it to disagree · Check it before it leaves the PMO

Use the AI your organisation has approved. Don't paste the pack into a free tool.

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What each of them needs next

	Gordon Reporting PMO	Aisha Insight-led PMO	Fiona Decision-enabling PMO
Capabilities	Data standards, reconciliation, clean templates	Analysis, pattern-spotting, business context	Framing options, trade-offs, facilitation
Behaviours	Accurate and on time	Curious: asks why, joins the dots	Brave: challenges, recommends, lets go of the call
Relationships	Project managers who submit	Delivery and finance who share context	Sponsors who bring the decision early

Every role profile plays a part, Administrator to Director. **This grid is on page 48 of your workbook.**

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One step, tomorrow

A **If you're Gordon:** Automate one report end to end. Spend the time you get back on the “so what” page.

B **If you're Aisha:** Reframe one steering pack around a single decision. Ask your sponsor which call they're struggling with.

C **If you're Fiona:** Write down the boundary: what the PMO recommends, and who makes the call.

Tonight: try one prompt on your next meeting.

No AI to hand? Write one line above the RAG table: what steering should decide.

stories.rumoiq.com/?org=pmo-insight

Keep going after the room: a short PMO track, 10 minutes a day

Write yours on page 48. You have a minute.

Thank you. David Rolo · rumointelligence.com

Ask a Question during any session in the conference app

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Keep Yourself Refreshed!

Help yourself to drinks throughout the sessions

AVAILABLE IN THE CATERING AREA



What Makes Data Decision-Ready?

Eileen J Roden
House of PMO

Ask a Question during any session in the conference app

DAY ONE SHOWS US WHERE REPORTING FALLS SHORT

Reporting Problems

Where reporting loses trust, meaning or usefulness.

Unsupported Decisions

Where the current pack does not properly support decision-making.

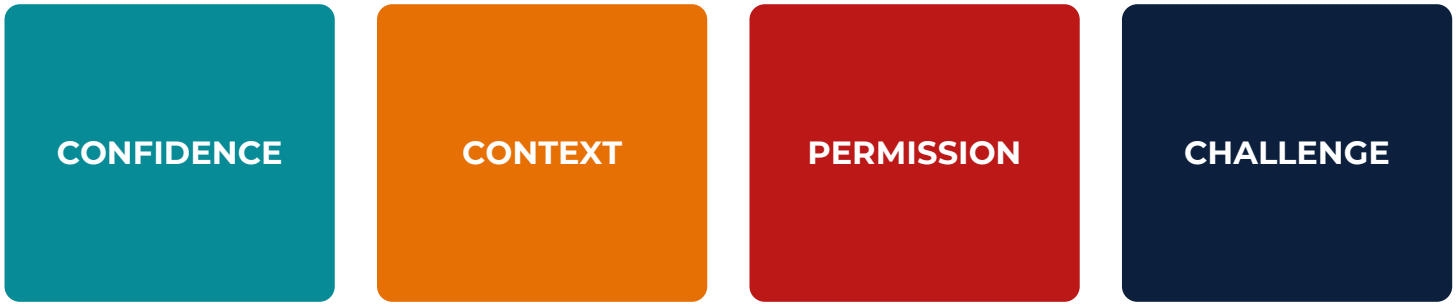
Evidence Gaps

Information that is missing, stale, disputed or uncertain.

Today the question changes:

How do we know that the evidence we have is suitable to support a sound decision?

INFORMATION ALONE IS NOT ENOUGH



A credible number can still lead to a poor decision if nobody feels able to question it

SIX QUALITIES OF DECISION-READY EVIDENCE

Owned

- Someone understands and stands behind the source

Current

- Recent enough for the decision being made

Relevant

- Connected to the decision, not just available

Comparable

- Definitions and baselines are clear

Interpreted

- The PMO explains meaning, not just numbers

Actionable

- Supports a choice, escalation or next step

SO, WHAT WOULD WE VERIFY OR IMPROVE FIRST?

Look especially for evidence that is:

HIGH IMPACT + LOW CONFIDENCE



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Data Confidence Lab
Finding the Gaps Behind the Dashboard

Michael Campbell / Precision PMO



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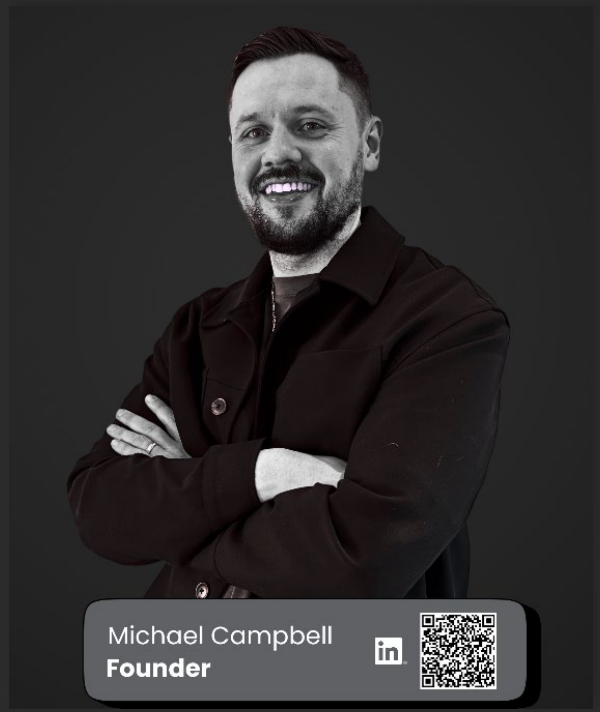
PRECISION PMO

Precision PMO is a Scottish PMO consultancy specialising in data-verified project governance.

We help leadership teams strengthen their delivery data so it’s usable for confident decisions and future AI adoption.



WWW.PRECISIONPMO.CO.UK

1. Single Source of Truth

2. Turning Data into Insight (Group Exercise)

3. Sense-Making in Practice: Case Studies

4. Q&A: Challenges & Reality



You've probably heard this one before.....

- Once we fix the data once, we're done.
- Tool x is the single source of truth.
- More data means better decisions.
- The data speaks for itself.

The Single Source of Truth

In complex delivery environments, certainty is an illusion.

The real risk is building systems that feel reassuring but hide the truth.



Where it breaks down

- Forecasts change
- Assumptions shift
- Status ages
- Context moves

Even the best systems are fed by people, processes, and assumptions. Those inputs change daily or weekly.

What we call a single source of truth is not a fixed point - it is an aggregation of moving parts.

Living, Breathing, Data

The risk is not that the data is wrong. The risk is believing it is static.

- Data is living and breathing.
- It is never “done”.
- The goal is not completion. It is usefulness.

Data behaves more like a living organism than a finished asset.

It requires continuous care to remain decision-useful.



So.. what matters?

- Cadence - How often data is refreshed matters more than how pretty it looks.
- Hygiene - Regular updates with known limitations beat infrequent ‘perfect’ snapshots.
- Verification - How it is verified matters more than where it lives.

Governance is about keeping insight alive, not building monuments.

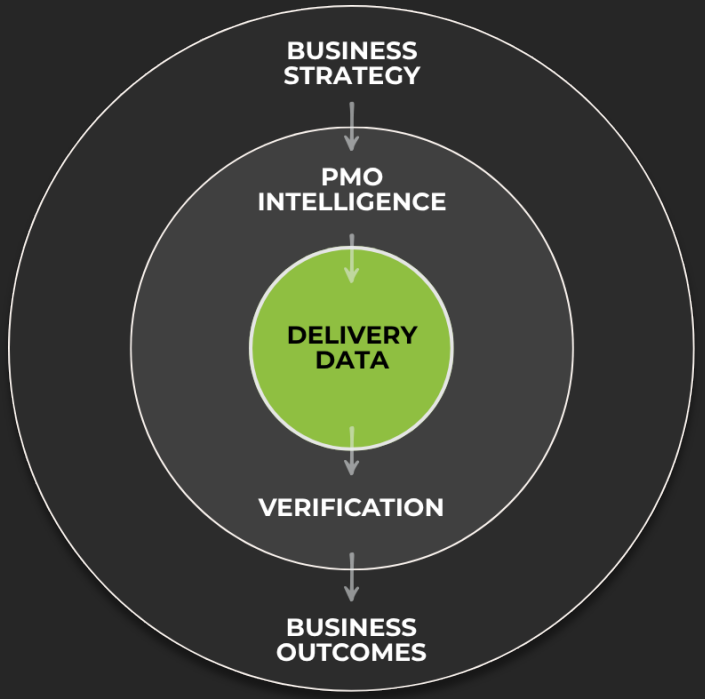
Triangulation

Confidence comes from triangulation:

- What delivery is reporting
- What the data is actually showing
- What the outcomes suggest is happening

No single data point tells the full story - confidence comes from combining patterns.

Triangulation is not theory. It is a practical skill. This is what we are about to practice.



1. “Single Source of Truth”

2. **Turning Data into Insight** (Group Exercise)

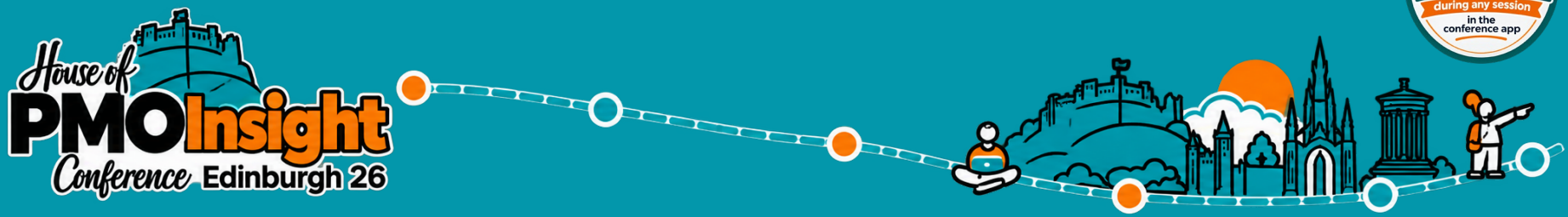
3. Sense-Making in Practice: Case Studies

4. Q&A: Challenges & Reality

EXERCISE TIME

Table Exercise

Time to discuss, share and capture



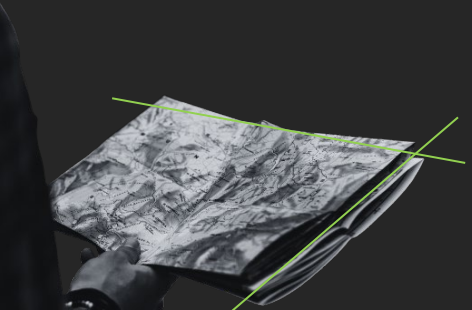
Turning Data Into Insight

Insight does not come from perfect data - it comes from how you prioritise, maintain, and interpret changing information.

- Each group will choose one real organisation or delivery example that someone at the table knows well.

- You will use that same example for the whole exercise!

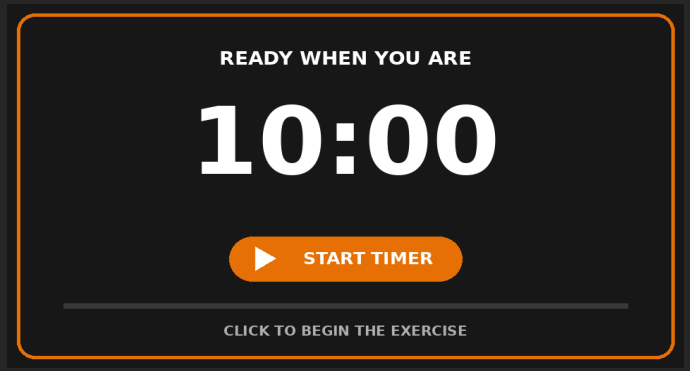
There are no right answers - the aim is to experience how insight is created as data changes, not to design a perfect solution.

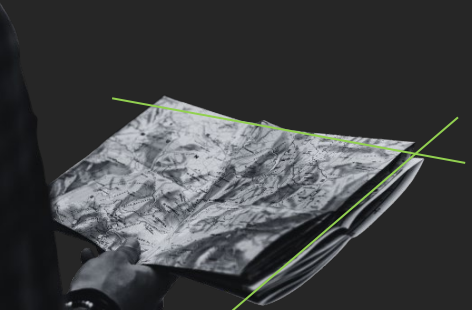




1 – Pick What Matters (10 mins)

- Choose a real example
- Log your top 2 issues
- List key data inputs
- Note how often they get updated
- Rank the top 3 by usefulness





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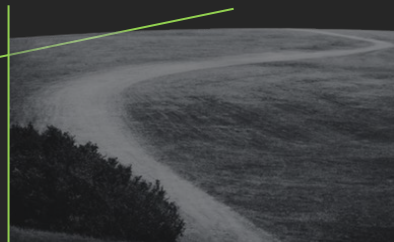


2 – Check trust & upkeep (15 mins)

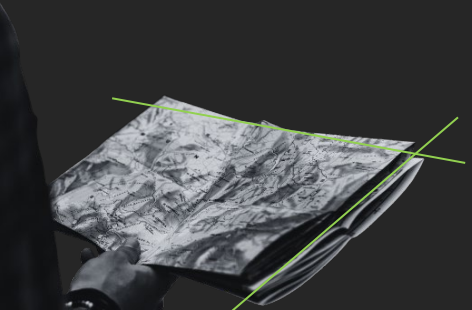
- **Impact:** High / Medium / Low
- **Trust:** Green / Amber / Red
- If it feels off – why?
- One quick improvement (per data source)

READY WHEN YOU ARE

15:00

START TIMER

CLICK TO BEGIN THE EXERCISE





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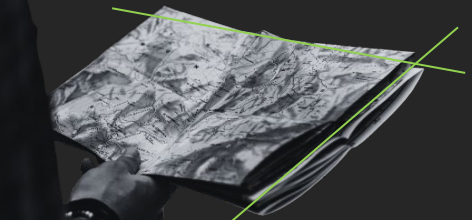
3 – Signals into insight (10 mins)

What we are doing now is noticing mismatches.

Places where the data moves at different speeds, or tells slightly different stories. Each mismatch is a “signal”.

- One main mismatch (what is changing?)
- One supporting line (what explains it?)
- One early warning signal (what might help surface it?)



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READY WHEN YOU ARE

10:00

START TIMER

CLICK TO BEGIN THE EXERCISE

4 – Sense-Check (10 mins)

Look at everything you've captured so far & ask yourselves:

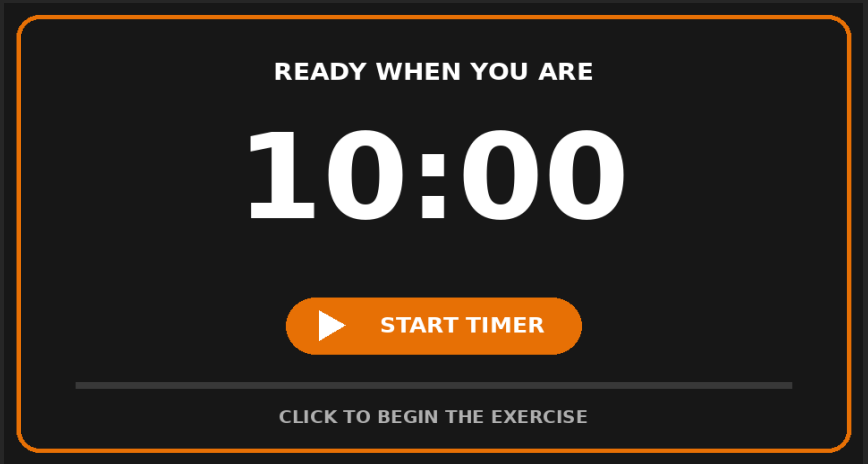
- Where do the signals conflict your top 2 issues?
- What feels out of proportion?
- What surprised you?

Identify:

- One inconsistency - One assumption you're relying on

Agree

- One thing you would want to verify next.



1. “Single Source of Truth”

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4.Q&A: Challenges & Reality

Case Study

Who: Fast-scaling tech consultancy

Where: Rapid growth, visibility lagging

Size: ~50+, 15+ clients, £8m+ turnover

Why?
As the organisation scaled, leadership confidence in delivery oversight declined despite regular reporting and experienced project managers.



Challenge

Limited trust in reported project status

Margin issues surfacing late in the financial cycle

Risks escalating only once outcomes were difficult to influence

Resource pressure without a portfolio-level view

Constraints

No full-time PM team

Founder dependent

Limited budget for tooling or new hires

Had to work within ServiceNow SPM & Excel

Tooling

Free time tracking tool

Manual governance updates

Excel

PM governance layer at first (weekly data validation)

What we did

Clear Objective:
Surface hidden risk, quantify commercial exposure, and define clear next steps without disrupting delivery teams.



Find

Structured kick-off with leadership and delivery leads

Captured stated delivery problems and decision blocker hypotheses

Mapped issues to available delivery and commercial data



Prove

Reviewed live project, financial, and planning artefacts

Analysed portfolio-level patterns and dependencies

Validated reported status against underlying delivery signals



Fix

Established a shared, data-verified delivery baseline

Identified root causes rather than symptoms

Defined clear stabilisation and improvement steps

Produced a phased roadmap with clear governance signals

The Outcome

- Approximately 12% margin at risk across projects due to inaccurately recorded time
- Exposed forecast inaccuracy driven by optimistic, self-reported project status
- Delivered an executive-ready **diagnostic pack** with prioritised findings and actions
- Surfaced portfolio-level resource pressure and burnout previously hidden at project level

Case Study

Who: Mid-sized MSP

Audience: CEO,COO, CTO

Size: ~150+, 15+ clients, £15m+ turnover

Why?
Leadership believed the business was chronically over-servicing but had no way to prove it.



Fragmented delivery and commercial data

No reliable way to evidence over-servicing

Low confidence in reported effort vs revenue

Fear that fixing the data would be a large, disruptive exercise

Challenge

Diagnostic limited to senior leadership level

No appetite for large data clean-up programmes

Reliance on patchy Excel and a CRM for time and delivery data

Constraints

Detailed time tracking tool

No formal governance updates

Excel being used independently

Zoho CRM

Tooling

What we did

Clear Objective:
Understand whether over-servicing was real, and if so, why.



Find

Ran a structured leadership working session to surface perceived problems

Mapped all delivery, time, and commercial data inputs

Captured leadership assumptions about where over-servicing was occurring



Prove

Assessed how time and effort were being recorded in the CRM

Analysed effort profiles against commercial expectations

Tested reported data against how work was actually delivered



Fix

Identified the specific data points that mattered most commercially

Defined how those signals should be accurately captured in the CRM

Provided a prioritised, low-effort path to correct the data at source

The Outcome

- Confirmed the business was not over-servicing, but under-selling relative to effort required
- Identified inaccurate time profiling in the CRM as the **root cause**
- Reframed the problem from “delivery discipline” to “commercial visibility”
- Delivered a focused roadmap to fix the critical data without a full data overhaul

Data ≠ Decisions

The data doesn't tell the whole story



- Raw data - numbers, activity, metrics.
- Looks complete but isn't.



- Data connected and interpreted.
- You can start to see the shape.



- Data verified, triangulated, and tied to outcomes.
- The full picture emerges.

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Data Creates **Decisions** Creates **Outcomes**

Creates



Informs

key data tips

1. Stop chasing a **single source** of truth
2. Build a Cadence before your Dashboard
3. Trust comes from verification, not location
4. Look for mismatches, not answers
5. It's Not a One-time Fix - It's Always Evolving

1. “Single Source of Truth”

2.Turning Data into Insight (Group Exercise)

3.Sense-Making in Practice: Case Studies

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Ask me anything



Ask a Question
during any session
in the
conference app

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Thank you!





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TIME FOR A BREAK!

Coffee & Clinics

Speak to the experts in the Partner Insights Studio

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Headline Partner
ProSymmetry

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Project the App Timeline

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This session will be starting shortly

Please take your seats

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Making PPM Tools Work for Your PMO

Panel Discussion



Making PPM Tools Work for Your PMO



Samantha Varner
Prosymmetry



Neil Derbyshire
Planview



John McIntyre
HotPMO



Gero Renker
Power Framework



Simon Sharp
Verto

Ask a Question during any session in the conference app

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1

Where do you see PPM tools/platforms making the biggest difference to how PMOs work today?



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2

We talk a lot about moving PMOs from reporting to insight. What role can PPM tools/platforms realistically play in making that happen?



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Making PPM Tools Work for Your PMO



Samantha Varner
Prosymmetry



Neil Derbyshire
Planview



John McIntyre
HotPMO



Gero Renker
Power Framework



Simon Sharp
Verto

Ask a Question during any session in the conference app

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Looking Ahead to This Afternoon

Governance & Decision-Making

1. How do we make governance meetings more decision-oriented?
2. When should the PMO challenge rather than simply report?

Reporting & Insight

3. What makes reporting genuinely useful to senior decision-makers?
4. What reporting should we stop because it adds little decision value?

PMO Capability & Change

5. What should the PMO stop, start or strengthen to become more decision-enabling?
6. What gets in the way of a PMO becoming more decision-enabling?

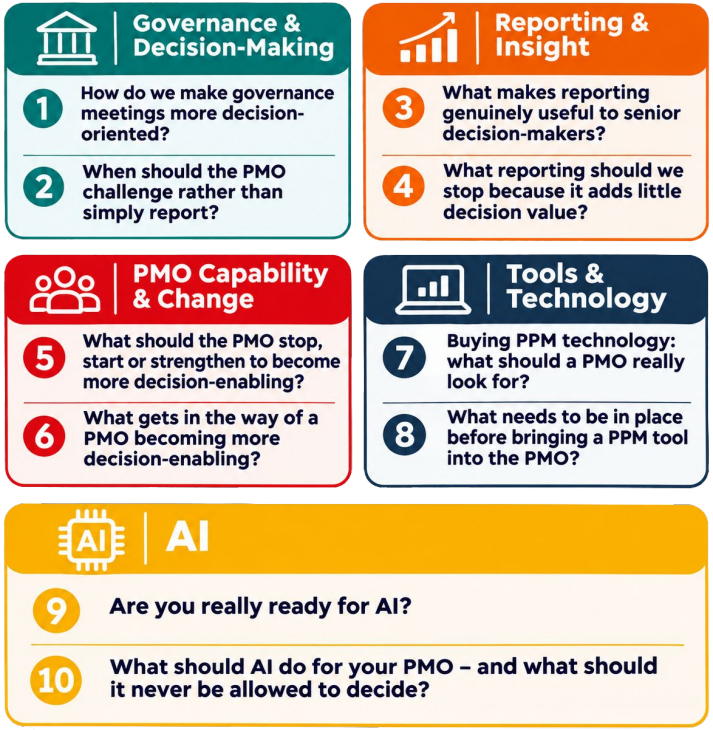
Tools & Technology

7. Buying PPM technology: what should a PMO really look for?
8. What needs to be in place before bringing a PPM tool into the PMO?

AI

9. Are you really ready for AI?
10. What should AI do for your PMO – and what should it never be allowed to decide?

Roundtables – Choose Your Questions



Before lunch, take a few minutes with your table to:

- Explore the 10 questions across the five themes.
- Agree on THREE questions your table would most like to discuss.
- Add your chosen question numbers to the conference app, making sure you include your table number.

We'll use your choices to help shape the roundtable conversations after lunch.

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Make Your Choices

Governance & Decision-Making

1. How do we make governance meetings more decision-oriented?
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IT'S LUNCH TIME

Meet the Partners

A chance to explore practical challenges

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Project the App Timeline

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This session will be starting shortly

Please take your seats

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The AI-Enabled PMO: Practical Use Cases, Not Hype

Sara Ellington / Tenable



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About Me



Sara (Rothkopf) Ellington

Sr. Director, Delivery Performance & Excellence @ Tenable

Led PMOs for over 25 years
(but not leading a PMO presently)

PMP Certified
since 2007

Worked in 7 industries
of varying sizes

From the United States (Maryland)

Avid reader of fiction & business books

Paint rocks in my spare time

2x cancer survivor

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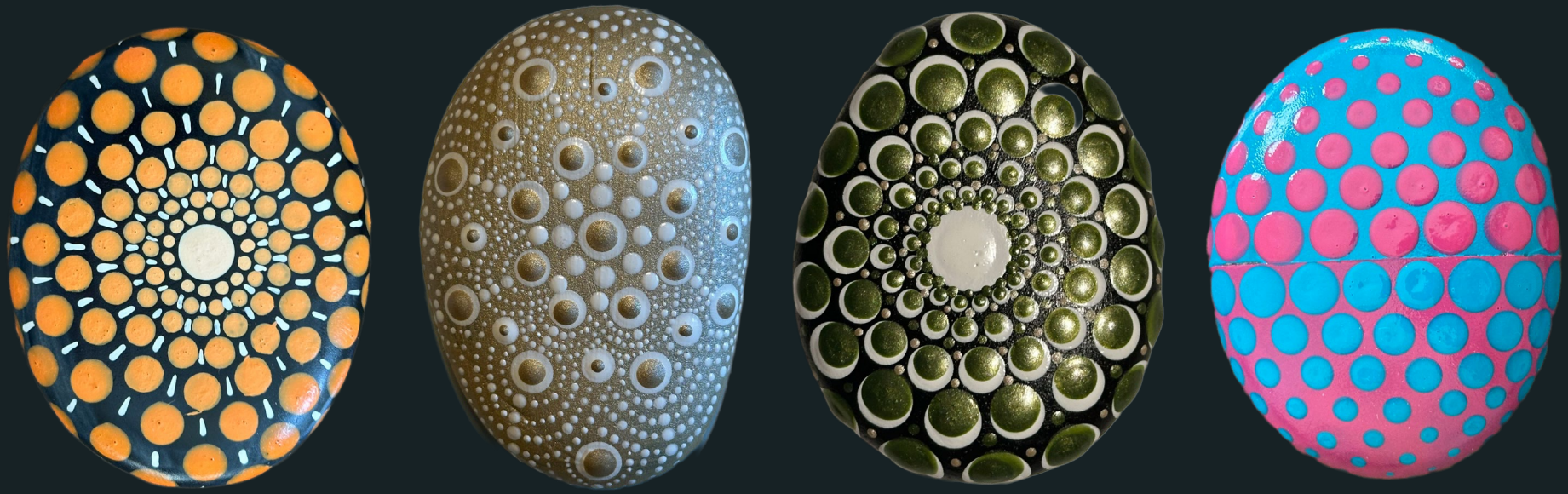
Painted Rocks



About Tenable

40K+

Customers across 160 countries

TENB

Publicly traded NASDAQ

1.7T

Unique exposure data points

65%+

of Fortune 500 companies

336K+

Common Vulnerabilities & Exposures (CVEs) covered

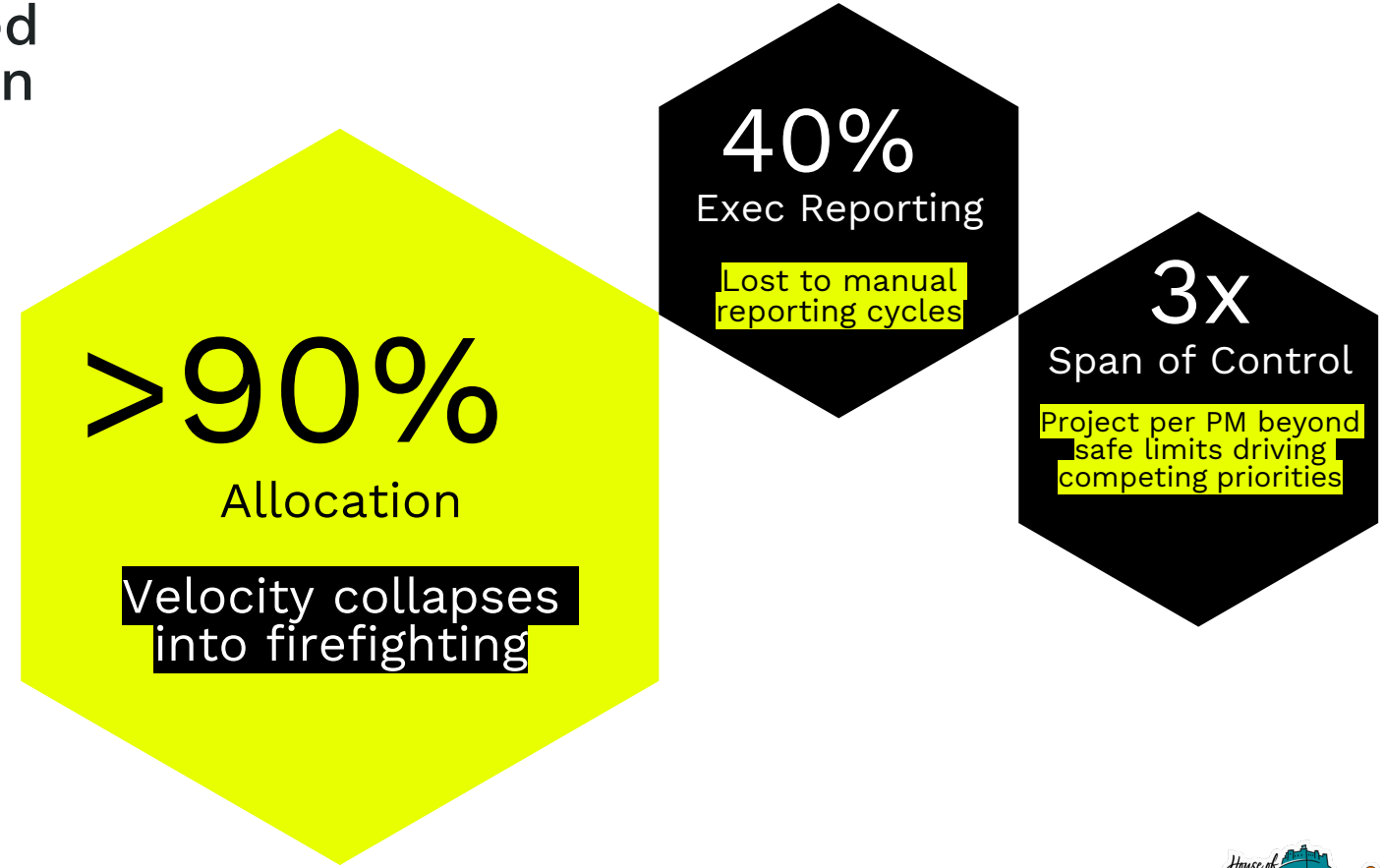
Leader

Gartner, Forrester, IDC

Agenda

- What is at Stake
- What Can Be Done
- Data Quality & Accuracy Caution
- How to Start
- Q&A
- Close

Overloaded PMOs in an AI-Speed Business



When Friction Rises, Teams “Rat Run”

Intentional Detours

Leaders bypass governance channels to hit critical deadlines.

Shadow Execution

Critical funding flows unmonitored through unofficial pipelines.

PMO Irrelevance

The office becomes a compliance chore instead of a strategic partner.

The business will always find its own path of least resistance around friction.

We must become the fastest route.

The Core Shift

Use AI To Create the Right Portfolio Transparency

Human-Led, Data-Backed High-Value Focus

Change the Focus

In depth insights coupled with ongoing trends

Drives earlier intervention and opportunities

tenable

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What Can Be Done?

Develop delivery insights

Identify bottlenecks, opportunities to automate and patterns in how work is getting done.

Provide portfolio analysis

Surface patterns that used to take significant manual effort to unearth.

Integrate reporting

Weave together disparate systems

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Weave together disparate systems

What was the problem we were solving?

Over commitment, under delivery.

The Prompt

Cowork prompt:

> I need you to investigate why our team consistently underdelivers on sprint commitments. Start by opening the sprint report in Databricks — look at the dashboard and the underlying data tables. Filter for all items that were **committed to a sprint but not completed by sprint end**, across the last [X] sprints.
>
> Once you have that dataset, analyze it for patterns and commonalities across these dimensions:
>
> - **Resource assignment** — Are the same team members repeatedly associated with incomplete items? Look at both assignee and any secondary owners.
> - **Business partner / requestor** — Do incomplete items cluster around requests from specific business partners, stakeholders, or teams?
> - **Tool or system** — Are incomplete items concentrated in work that touches a particular tool, platform, or integration?
> - **Work type or category** — Are certain types of work (e.g., bugs vs. features, specific project types) overrepresented?
> - **Estimation patterns** — Do incomplete items tend to carry higher story points or effort estimates? Were they sized differently than completed items?
> - **Sprint timing** — Were items added mid-sprint vs. committed at planning? Do items that slip tend to appear in certain sprint positions (early vs. late in the quarter)?
> - **Dependencies** — Do incomplete items share blockers, dependent teams, or upstream systems?
>
> For each dimension where you find a meaningful pattern, quantify it (e.g., "40% of incomplete items were assigned to the same two people" or "60% touched the [Tool X] integration"). Flag anything that appears to be a compounding factor — combinations that show up together frequently.
>
> Close with a ranked summary of the top 3–5 root cause hypotheses, ordered by frequency and potential impact, and note any data gaps that would strengthen or disprove each hypothesis.

Use AI To Ensure Accuracy

STEP 1

Extract Summary

Take the results AI gave you or ask AI for an exec summary of the data it produced.

STEP 2

Verify Ground Truth

Prompt AI: "Here is an exec summary and the raw data behind it. Is this right?"

STEP 3

Show Work

For each claim, recalculate the actual number from the summary and show your work.

STEP 4

Language Precision Audit

Also, check the precision of any superlative or directional language ('highest', 'lowest', 'varied') and flag if the wording could be misread or reversed in meaning compared to what the data actually shows.

The findings

Sprints 7–11 · 624 committed items · 5-sprint average

The overcommitment cycle

~20%
completion rate

126 of 624 items completed — team executes ~27 items/sprint on new work, but inflated denominators mask progress

66–76%
carryover each sprint

41 issues were incomplete in all 5 sprints. Only 25–40 items are genuinely new per sprint

99%
items without story points

No estimates = no capacity planning. Overcommitment is structurally undetectable at planning time

Bottlenecks & concentration

<1%
BT-5603 completion

117 committed items in HV Quoting / CPQ — 1 completed. Spans CPQ, Distributors Portal, Mulesoft, Netsuite, LMS

28.3%
incomplete items in UAT

Dev completes but items stall awaiting acceptance. No named testers, no test window agreed at commit time

37%
incomplete owned by top 3

Joe (21.3%), Niamh and Liz each averaging sub-8% completion rates over 5 sprints

Three root causes drove everything

01

Carryover compounding

66–76% of each sprint is re-committed incomplete work. 41 items were committed and incomplete across all 5 sprints. The denominator is 2–4× real capacity.

Removing stale items alone cuts committed count ~40%

02

One stalled mega-project (BT-5603)

HV Quoting in CPQ: 117 committed, 1 completed (0.9%). Joe owns 88 of 116 incomplete items, averaging 21 commits/sprint at 1.9% completion.

Removing BT-5603 improves apparent rate from 20% → 28%

03

UAT is a wall, not a gate

141 items (28.3%) end each sprint waiting for acceptance testing. Items complete dev and then stall; no named tester, no agreed test window.

Resolving UAT flow converts 28% of 'incomplete' to 'done'

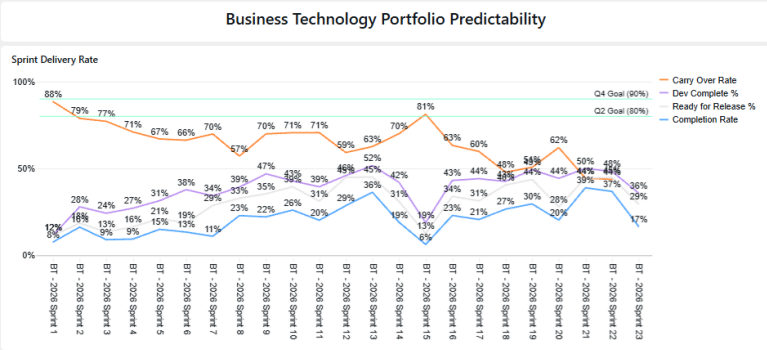
Created Transparency

From high-level portfolio summaries to details required for resource management

PORTFOLIO VIEW

High-Level Summaries

Provides leaders with real-time predictability metrics and quarter-by-quarter trend tracking.



BT Portfolio Predictability by Quarter

Quarter	Completion Rate	Status
Q1	12%	Complete
Q2	26%	Complete
Q3	21%	Complete
Q4	31%	In Progress

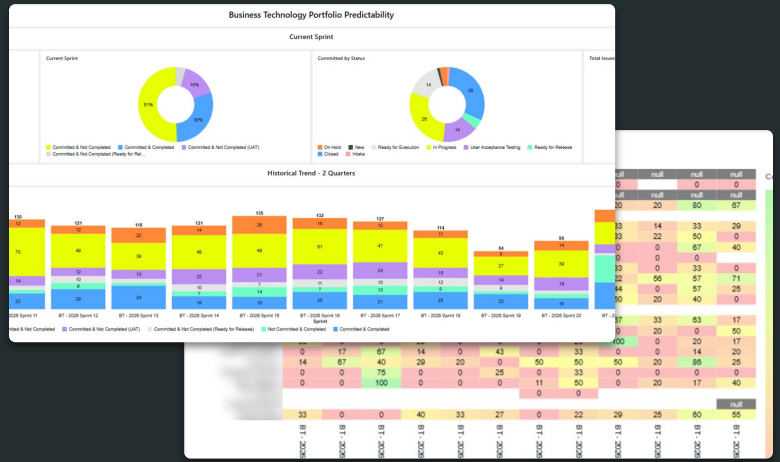
Point in Time Trend (vs. Q1)

Team	Completion Rate Trend	Carry Over Trend
Back-Office Apps	0%	-0%
CRM (Salesforce)	18%	-18%
Experience Engineering	24%	-24%

RESOURCE DETAIL

Granular Work Details

Enables managers to drill down into individual completion rates, assignees, and uncommitted tickets.



Shifted to Business Focused Insights

FROM Q2 MESSAGE

Tactical Delivery Focus

20%

Improved sprint predictability

10%

Reduction in carryover work

Unified Business Value Focused Metrics

Dashboards built using AI



TO Q3 MESSAGE

Strategic Business Impact

51%

Concept-to-value lead time improvement (65 days faster)

65%

SLA achievement in Q3 (up 14% in Q3)

70%

Increase in Growth/Transform work vs Q2 (up to 11.9%)

What Can Be Done?

Develop delivery insights

Identify bottlenecks, opportunities to automate and patterns in how work is getting done.

Provide portfolio analysis

Surface patterns that used to take significant manual effort to unearth.

Integrate reporting

Weave together disparate systems

What was the problem we were solving?

Pressure to automate routine work and delegate repeatable tasks to support.

Not all insights need to be dashboards!

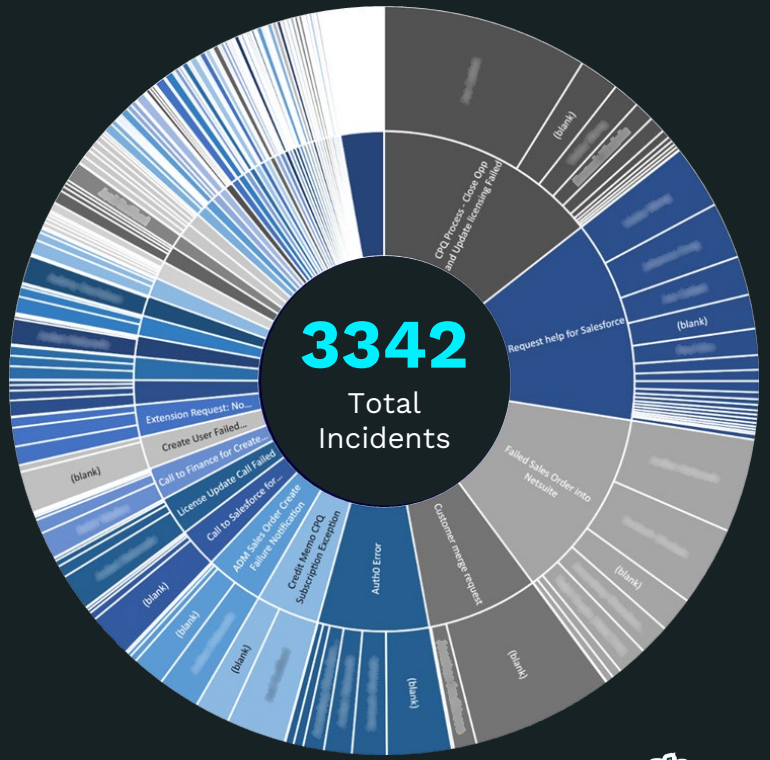
PROMPT

I am reviewing the enhancements and incidents of the BT Team over the last 2 years to identify

1. Key themes of what we have delivered for the business over the last 2 years
2. Recurring capabilities delivered
3. Recurring defects/bugs

Step 1: Provide a bulleted list for each and quantify the number of records for each recurring trend in #2 and #3

Step 2: Offer suggestions of changes that can be made upstream via automation to eliminate the needs for the enhancements/incidents



What Can Be Done?



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Integrate reporting

Weave together disparate systems

What was the problem we were solving?

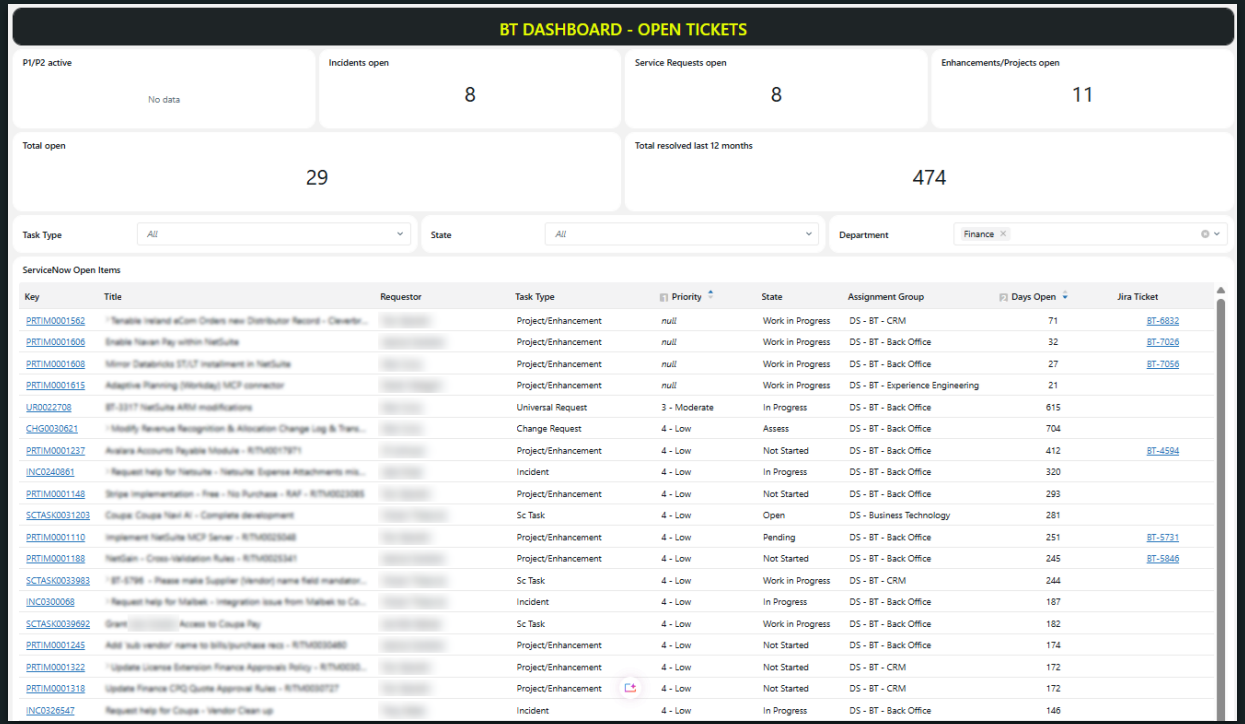
Too many disparate tools without a central view to easily see all of the work.

Intake system was clunky and hard to use to track work.

Use AI to Pull Data Together

- Created efficiencies for leaders to make their jobs easier
- Used AI prompts to build the dashboard:

"Write a prompt in simple language for Databricks Genie Code that takes the external_link field from a child record and puts it on the parent task."



BT DASHBOARD - OPEN TICKETS

P1/P2 active	Incidents open	Service Requests open	Enhancements/Projects open
No data	8	8	11

Total open	Total resolved last 12 months
29	474

Task Type: All | State: All | Department: Finance

ServiceNow Open Items

Key	Title	Requestor	Task Type	Priority	State	Assignment Group	Days Open	Jira Ticket
PRTIM0001562	[redacted]	[redacted]	Project/Enhancement	null	Work in Progress	DS - BT - CRM	71	BT-6832
PRTIM0001606	[redacted]	[redacted]	Project/Enhancement	null	Work in Progress	DS - BT - Back Office	32	BT-7026
PRTIM0001608	[redacted]	[redacted]	Project/Enhancement	null	Work in Progress	DS - BT - Back Office	27	BT-7056
PRTIM0001615	[redacted]	[redacted]	Project/Enhancement	null	Work in Progress	DS - BT - Experience Engineering	21	
UR0022708	[redacted]	[redacted]	Universal Request	3 - Moderate	In Progress	DS - BT - Back Office	615	
CHG0030621	[redacted]	[redacted]	Change Request	4 - Low	Assess	DS - BT - Back Office	704	
PRTIM0001237	[redacted]	[redacted]	Project/Enhancement	4 - Low	Not Started	DS - BT - Back Office	412	BT-4594
INC0240861	[redacted]	[redacted]	Incident	4 - Low	In Progress	DS - BT - Back Office	320	
PRTIM0001148	[redacted]	[redacted]	Project/Enhancement	4 - Low	Not Started	DS - BT - Back Office	293	
SCTASK0031203	[redacted]	[redacted]	Sc Task	4 - Low	Open	DS - Business Technology	281	
PRTIM0001110	[redacted]	[redacted]	Project/Enhancement	4 - Low	Pending	DS - BT - Back Office	251	BT-5731
PRTIM0001188	[redacted]	[redacted]	Project/Enhancement	4 - Low	Not Started	DS - BT - Back Office	245	BT-5846
SCTASK0033983	[redacted]	[redacted]	Sc Task	4 - Low	Work in Progress	DS - BT - CRM	244	
INC0300068	[redacted]	[redacted]	Incident	4 - Low	In Progress	DS - BT - Back Office	187	
SCTASK0039692	[redacted]	[redacted]	Sc Task	4 - Low	Work in Progress	DS - BT - Back Office	182	
PRTIM0001245	[redacted]	[redacted]	Project/Enhancement	4 - Low	Not Started	DS - BT - Back Office	174	
PRTIM0001322	[redacted]	[redacted]	Project/Enhancement	4 - Low	Not Started	DS - BT - CRM	172	
PRTIM0001318	[redacted]	[redacted]	Project/Enhancement	4 - Low	Not Started	DS - BT - CRM	172	
INC0326547	[redacted]	[redacted]	Incident	4 - Low	In Progress	DS - BT - Back Office	146	

Other Data Quality Validation Techniques

Double Independent Review

Do this review twice, independently. The second pass should not see the first pass's answers. Then compare the two sets of flags.

For each flagged item, add a [NEEDS VALIDATION] tag with a one-line reason, so nothing inferred gets treated as confirmed.

List each field/item where the two runs disagree. Treat disagreement itself as a signal, flag it as requiring a direct question to clarify or an error to resolve.

Always Spot Check

Do not forget to look at the results and do a sanity check. Are the results what you are expecting?

How to Get Started

Pick One of the Prompts Reviewed Today and Practice



AI Show-and-Tell



Ask AI What To Do



Interesting reads:



Boris Cherny's 10 tips thread

How to be more ambitious: A tutorial for humans with models by Felix Rieseberg

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Q&A

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Move From The Toll Booth To Open Road Tolling



FROM LEGACY GATEKEEPER

The Stop-and-Pay Barrier

Every initiative halts for static reviews and manual data entry.



TO MODERN AI OVERSIGHT

Open-Road Flow

Continuous tracking at highway speed without stopping delivery teams.

Find Friction

Find the friction points (whether it is delivery, intake, governance, or a process).

→

Leverage AI

Identify how AI can drive transparency and insights.

→

Realize Value

Partner with stakeholders and plan for the value you aim to achieve.

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Tip on how to use AI effectively from Reid Hoffman, co-founder of LinkedIn:

> “[Have a] mindset of curiosity, start experimenting with it, try on something that matters to you.”

Thank you


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AI PROJECT GOVERNANCE FRAMEWORK
AIPGF
APMG International

AI Governance in Projects: The PMO's Emerging Role

Emanuela Giangregorio
author of the AI Project Governance Framework

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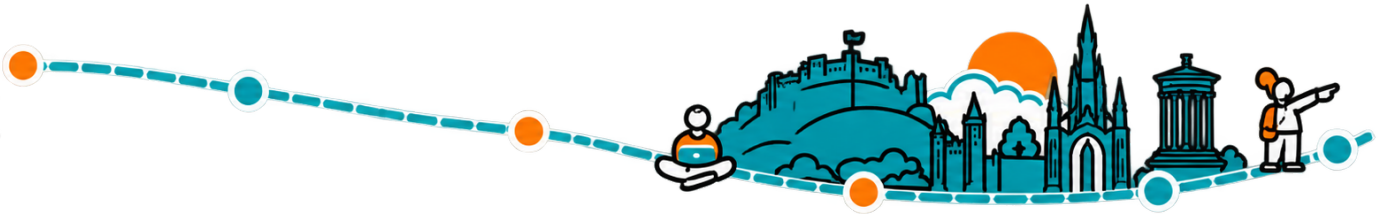
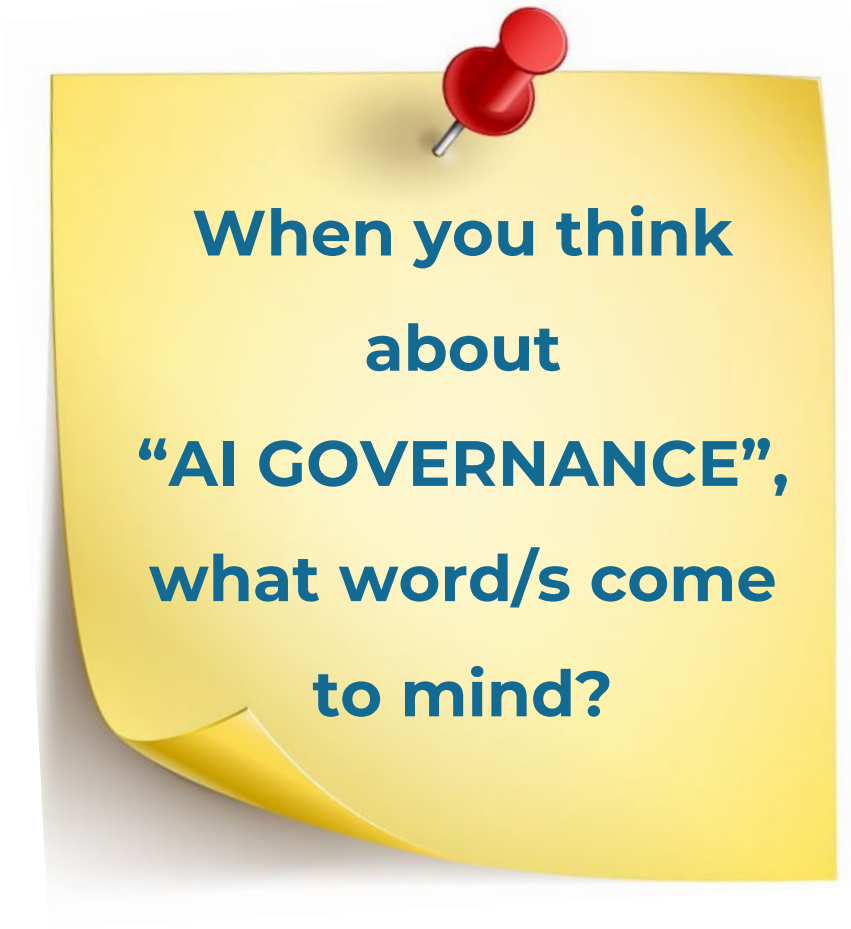


Governance of AI use in Projects...



The Scope of AI Governance in Projects



Control

Compliance

Accountability

Standards

Data Privacy

Red Tape

Bottlenecks

Transparency

Guardrails

Risk Management

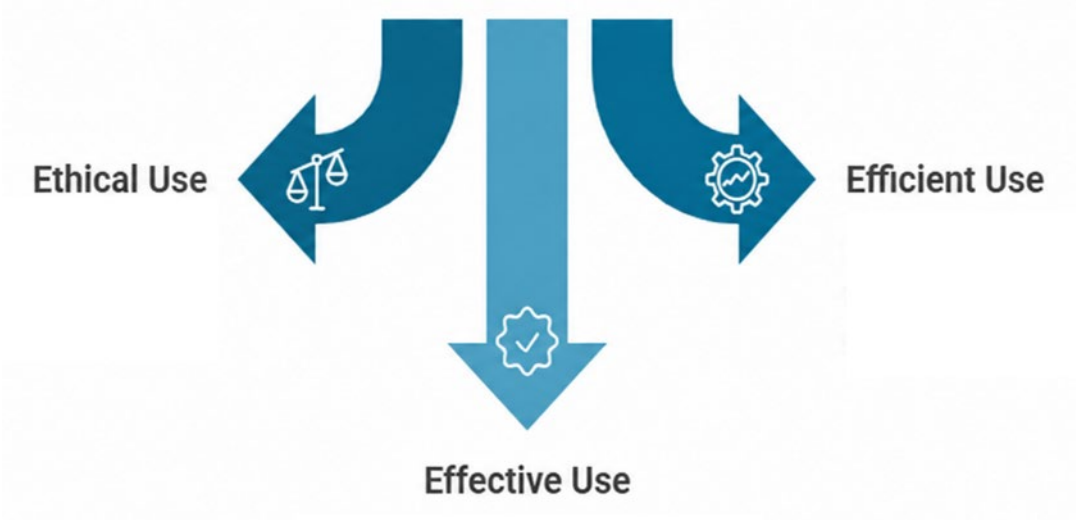
Assurance

Ethics

Policing

Extra Admin

The Scope of AI Governance in Projects



It's not just about **control and ethics**.

It's also about **how well AI tools are used to optimise project activity and contribute towards project success**.

When governed well, AI adoption and automation can scale on a solid governance foundation.

Latest Report: Pulse of AI Governance in Projects



AI Project Governance Capability Maturity Model (AIPG-CMM)

Where is your organisation on this CMM?



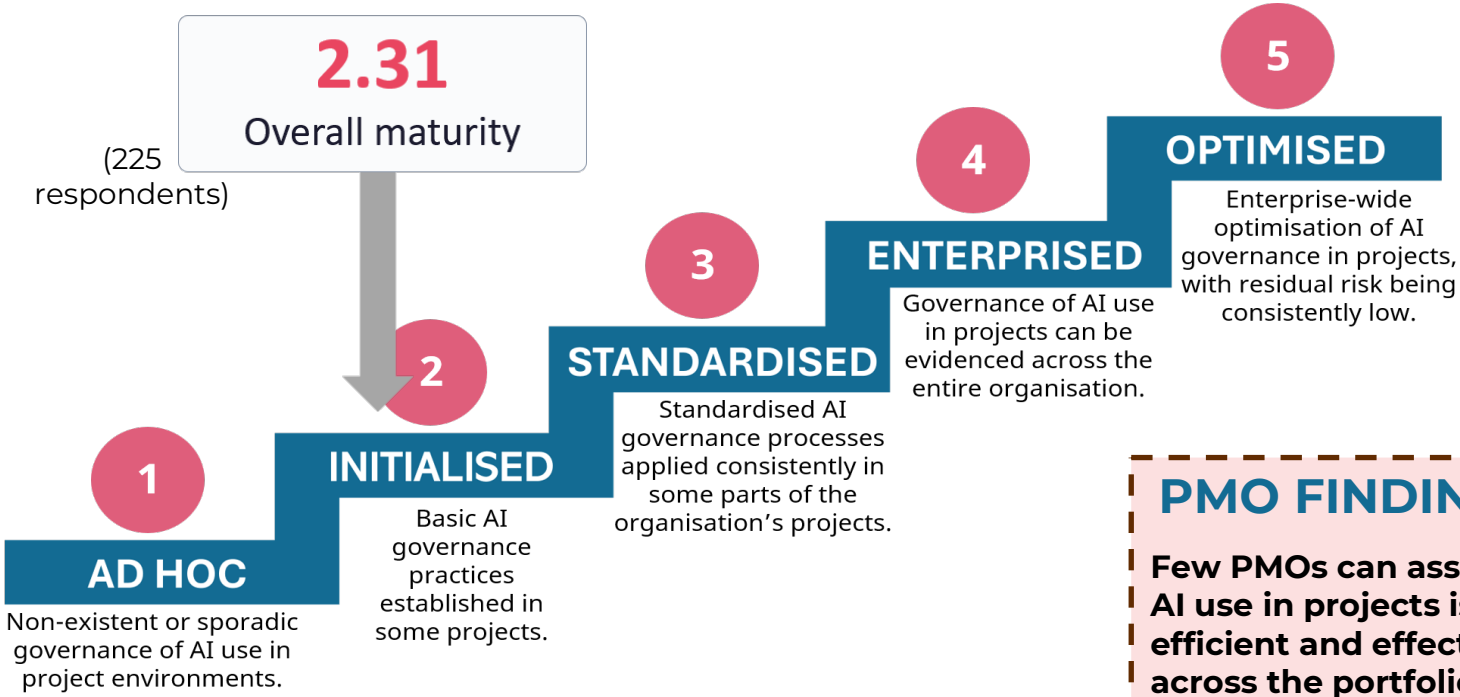
Your score is the average across four governance pillars

AI Strategy & Governance	AI Tools & Infrastructure	Human Capability & Accountability	Data Readiness & Quality

AI is Influencing Project Decisions Whilst Governance Lags

2.31
Overall maturity

(225 respondents)



PMO FINDING

Few PMOs can assure that AI use in projects is ethical, efficient and effective across the portfolio.

Source: Pulse of AI Governance in Projects, Autumn 2026 Report

The PMO's Two AI Governance Roles



1

Embed

AI governance into the organisation's project governance framework

2

Assure

that AI use in projects is ethical, efficient and effective

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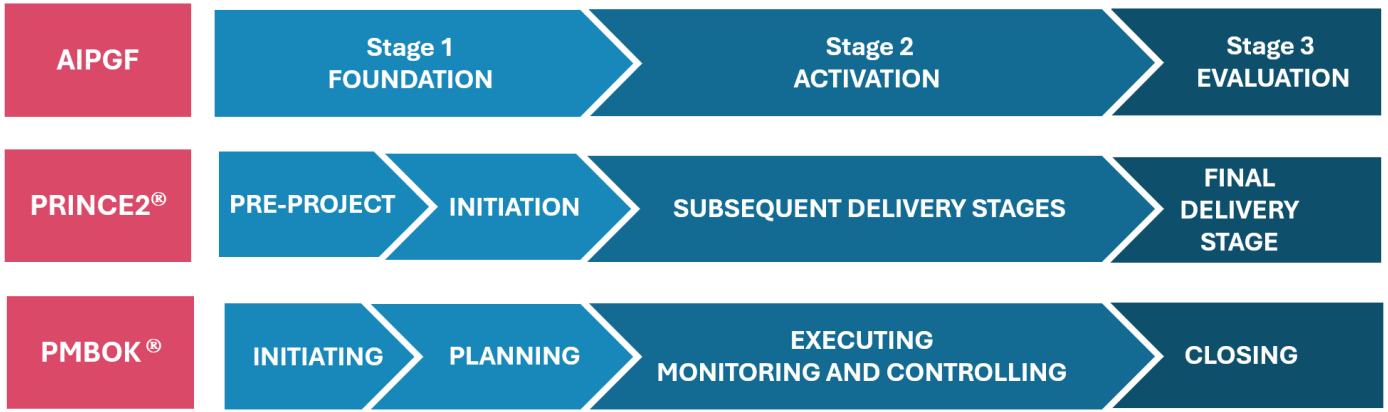
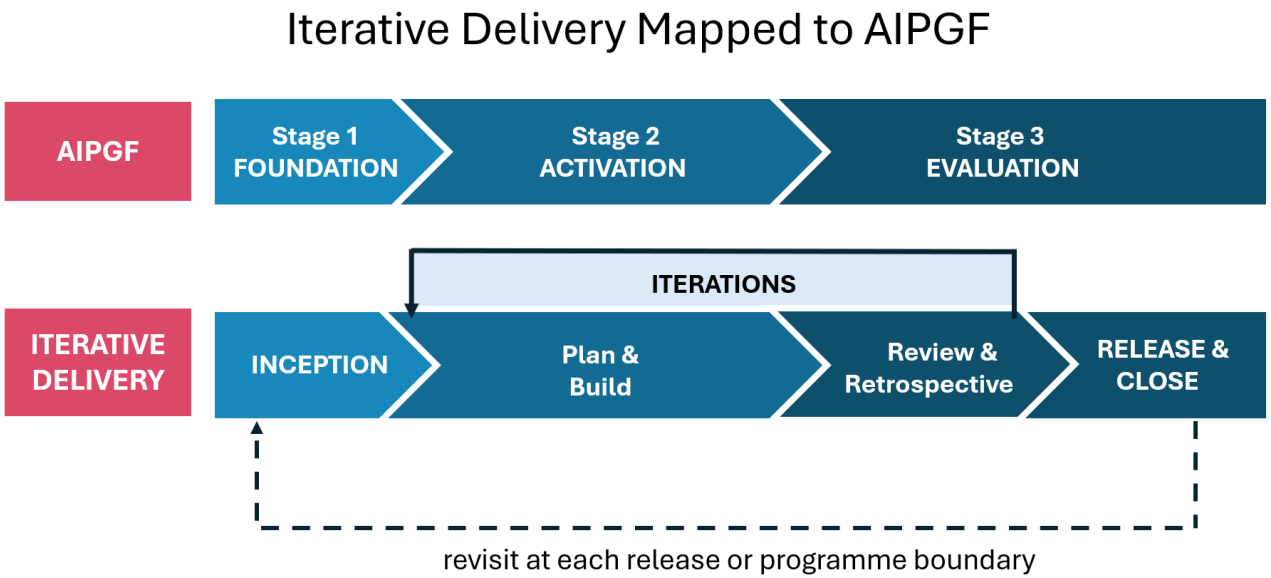
Role 1: Projects Shouldn't Have to Invent Their Own AI Governance

- The PMO should update the **existing project governance framework**, so all AI-assisted projects are governed consistently.
- The **AIPGF** is designed to **embed into that framework** through practical governance mechanisms.



Role 1: Projects Shouldn't Have to Invent Their Own AI Governance



Role 1: Projects Shouldn't Have to Invent Their Own AI Governance

Example AIPGF Artefacts/Deliverables

- ❑ AI Assistance Plan
- ❑ Data Readiness Assessment
- ❑ AI Assistance Risk Register
- ❑ AI Usage Report
- ❑ AI Lessons Learnt

AIPGF FOUNDATION

AIPGF ACTIVATION

AIPGF EVALUATION

The PMO's Two AI Governance Roles

1

Embed

AI governance into the organisation's project governance framework

2



Assure

that AI use in projects is ethical, efficient and effective

Role 2: Assurance

PMOs should be able to provide assurance that AI is used in a way that **maximises its benefits** and **reduces the related risks**.



Assurance begins with good questions...

Role 2: Example Assurance Questions



Foundation | Activation | Evaluation

1

TOOLS

Which AI tools will be used on this project, and for what?

2

DATA

What data do those tools need, and is it available, of adequate quality and approved for use?

3

RISKS

What could go wrong using AI on the project, and how will it be prevented, detected or corrected?

Role 2: Example Assurance Questions

Foundation | **Activation** | Evaluation

1
USE AND VALUE

Are the AI tools being used as planned and are they adding value?

2
HUMAN OVERSIGHT

Is appropriate human oversight of AI outputs maintained and evidenced?

3
ISSUES

How are AI-related issues on the project identified, resolved and reported?

Role 2: Example Assurance Questions

Foundation | Activation | **Evaluation**

1
BOUNDARIES
Was AI used within the agreed boundaries throughout delivery?

2
COLLABORATION
How well did humans and AI tools work together?

3
FUTURE USE
What should be continued, stopped or improved in future AI use within our projects and programmes?

***THINK**: Is AI use in your organisation's projects and programmes DELIBERATELY planned, managed and evaluated?*

Role 2: Assurance Often Requires a PMO Response

Trust	**Acceptable** - Accept the AI-generated output as fit for purpose under normal project governance.
Verify	**Check the evidence** - Obtain additional evidence or validation before relying on the output.
Challenge	**Question the reasoning** - where uncertainty, inconsistency or risk requires further scrutiny.
Escalate	**Refer to authority** - the appropriate governance authority, e.g. Project Board or DPO, needs to decide.
Stop	**Unacceptable** governance, legal, ethical or organisational risk – do not use the AI-generated deliverable.

Example: AI in the Business Case

SCENARIO

A project manager has used **AI assistance** to draft the **benefits forecast** in the **business case** for a major transformation programme.

Before it goes for approval, the PMO asks the author (project manager):

- ❑ **Was the use of AI deliberate and approved?**
- ❑ **What data was used by the AI to create the forecast?**
- ❑ **Who reviewed and validated it?**
- ❑ **Is there evidence of that review?**
- ❑ **Who remains accountable?**
- ❑ **Is there an audit trail if needed?**

Trust | **Verify** | **Challenge** | **Escalate** | **Stop**

The PMO's Two AI Governance Roles





1

Embed

AI governance into the organisation's project governance framework

2

Assure

that AI use in projects is ethical, efficient and effective

Stage 1 FOUNDATION → Stage 2 ACTIVATION → Stage 3 EVALUATION

Trust | Verify | Challenge | Escalate | Stop

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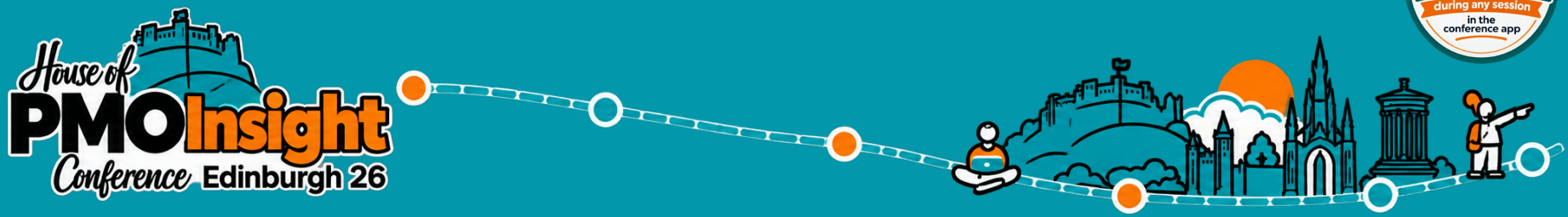
EXERCISE TIME

Table Exercise

Time to discuss, share and capture



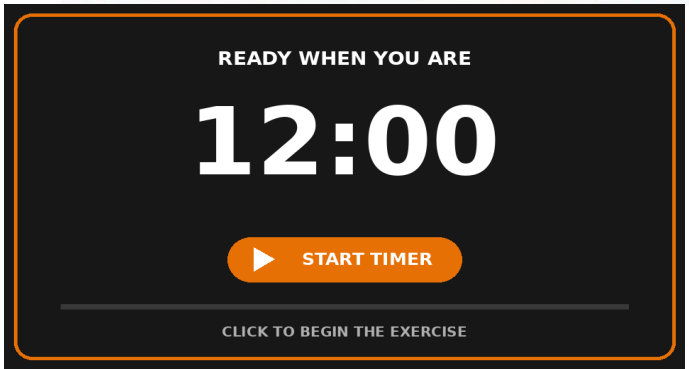
AI GOVERNANCE IN PROJECTS

Each table has been allocated one scenario. In every case, AI-generated information has appeared in a steering pack and could influence a decision. The PMO is reviewing the pack before it is issued



- You have 12 minutes to review the evidence, agree your table's primary governance response and be ready to explain your reasoning.
- There is intentionally no single correct answer.

***NB:** In all cases, the pack needs to be issued in the next two days.*



THANK YOU. Let's stay in touch.

https://www.linkedin.com/in/pmip/

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(Manny)

Email
emanuela@aipgf.pro

WhatsApp
+44 7905 005 754

Special offer for attendees: details in the slides you'll receive

TIME FOR A BREAK!

Coffee & Clinics

Speak to the experts in the Partner Insights Studio

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Headline Partner
ProSymmetry

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Project the App Timeline

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This session will be starting shortly

Please take your seats

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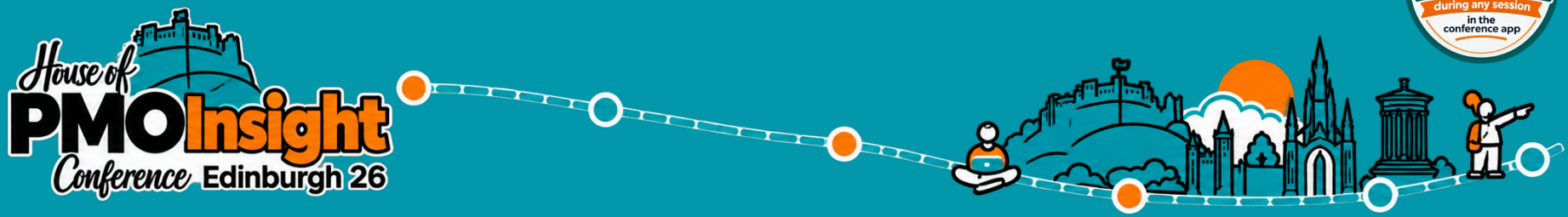
EXERCISE TIME

Table Exercise

Time to discuss, share and capture



Time for a Deeper Discussion

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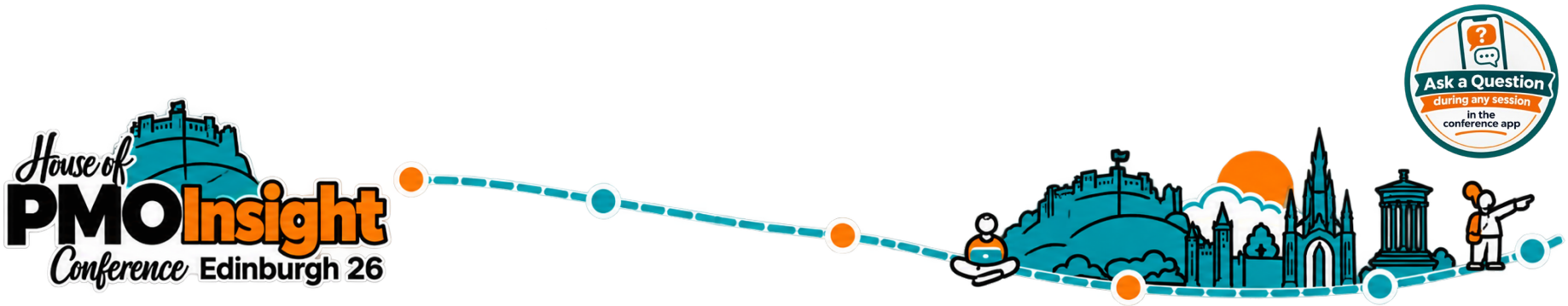
Roundtables

Discussions



Governance & Decision-Making

1. How do we make governance meetings more decision-oriented?
2. When should the PMO challenge rather than simply report?

Reporting & Insight

3. What makes reporting genuinely useful to senior decision-makers?
4. What reporting should we stop because it adds little decision value?

PMO Capability & Change

5. What should the PMO stop, start or strengthen to become more decision-enabling?
6. What gets in the way of a PMO becoming more decision-enabling?

Tools & Technology

7. Buying PPM technology: what should a PMO really look for?
8. What needs to be in place before bringing a PPM tool into the PMO?

AI

9. Are you really ready for AI?
10. What should AI do for your PMO – and what should it never be allowed to decide?

Earlier your team selected some questions

1. Check your table's two allocated questions

2. Discuss Question 1 for 18 minutes guided by your facilitator

3. Move to Question 2 for another 18 minutes

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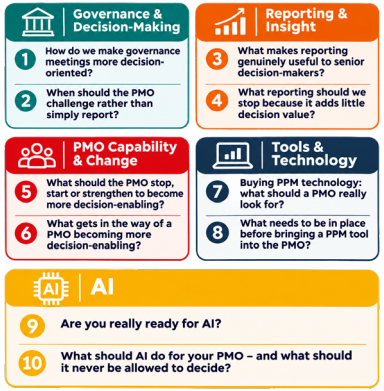

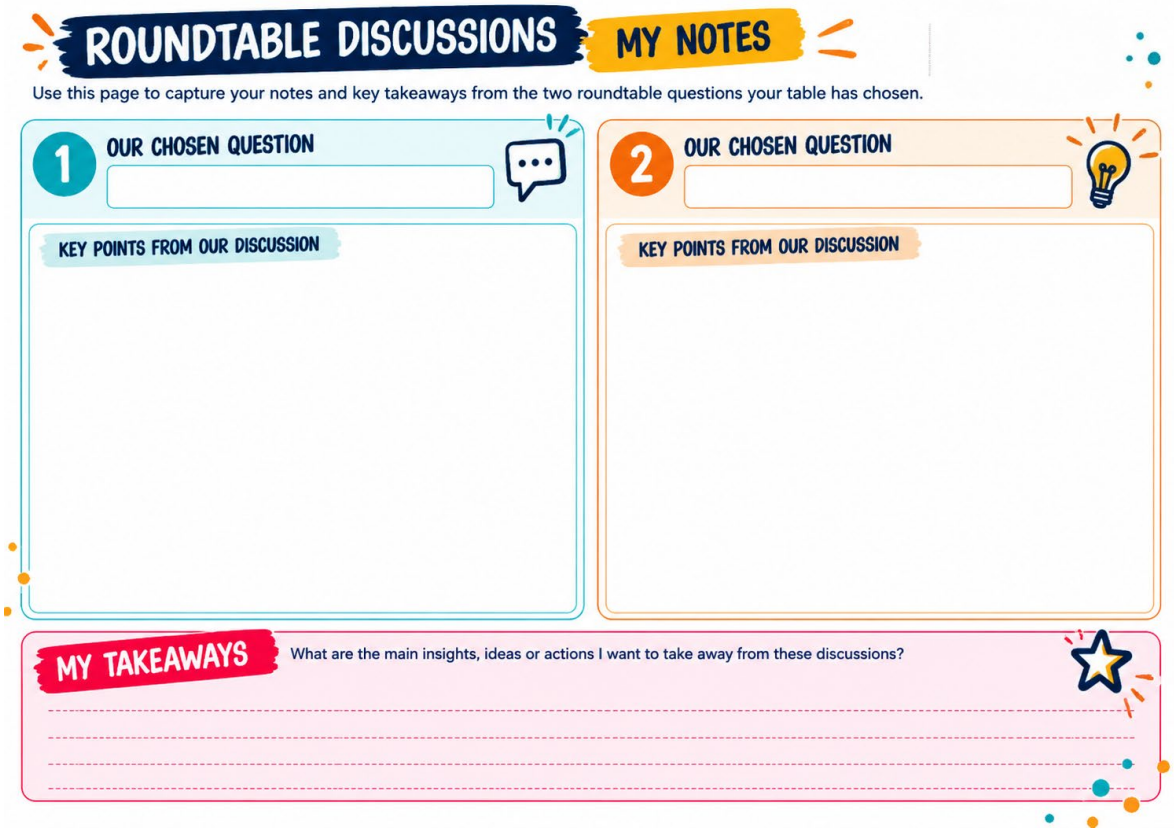

Complete the table exercise sheet

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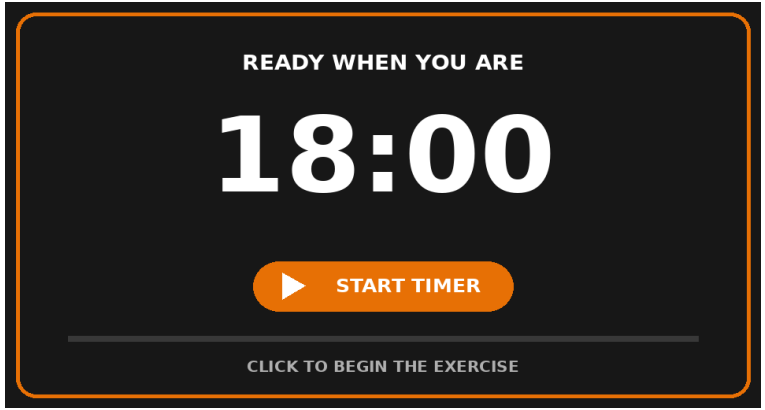
Question One – 18 minutes



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TIME TO CHANGE!

Governance & Decision-Making

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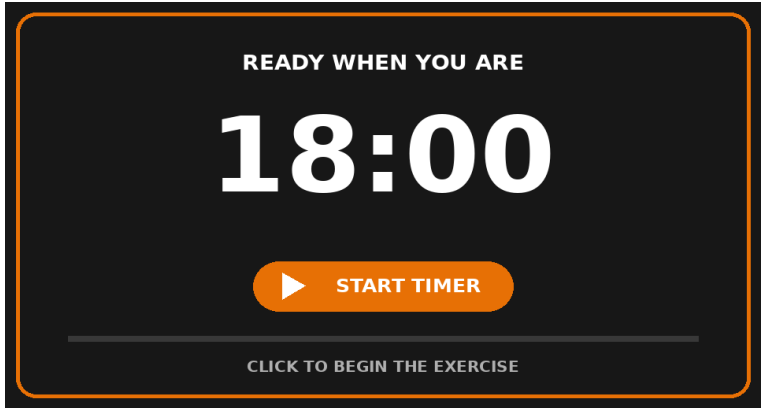
Question Two – 18 minutes



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LET'S HEAR FROM YOU

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Group Playback
What Needs to Change

Eileen & Aaron

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From the tables

- What question you discussed?
- Share one insight:
  - Something that makes a difference?
  - What can we do differently?
  - Question we still have
  - An idea to take forward



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We'll be collecting these



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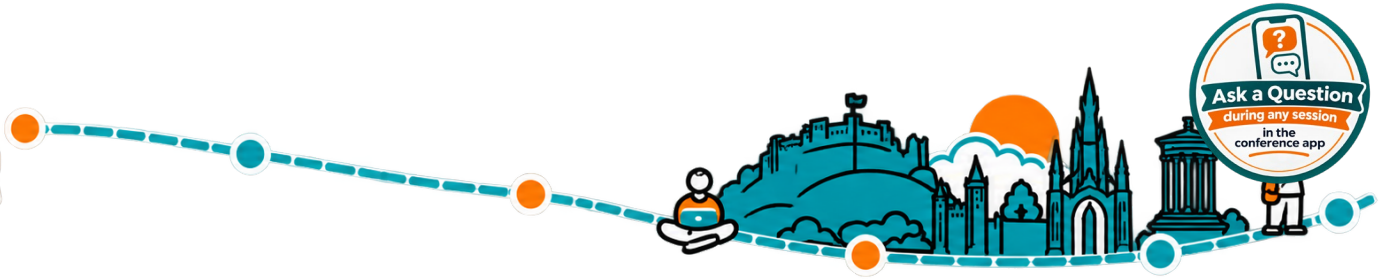
Your Next 90 Days: Your Action Plan

Eileen J Roden

House of PMO Insight Conference Edinburgh 26

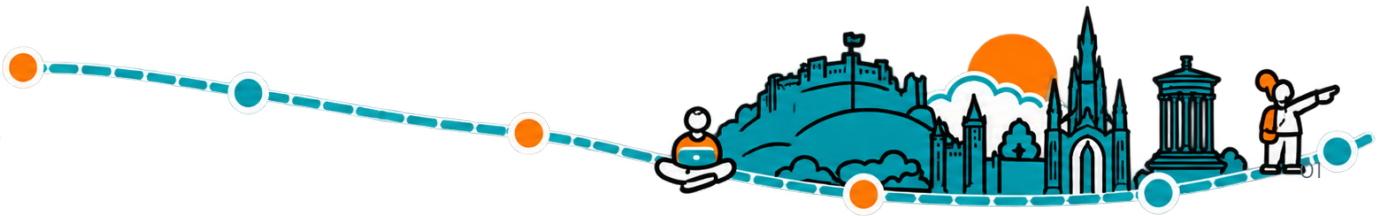


NOW FOR THE PLAN

YOUR NEXT 90 DAYS

What will you do differently?

Not a finished change plan. A thoughtful decision about where to start.



BACK TO THE BEGINNING

What did you want to leave with?

Return to your opening challenge.

KEEP IT

If it still matters, use it.

CHANGE IT

If these two days changed your thinking.

Workbook p. 7

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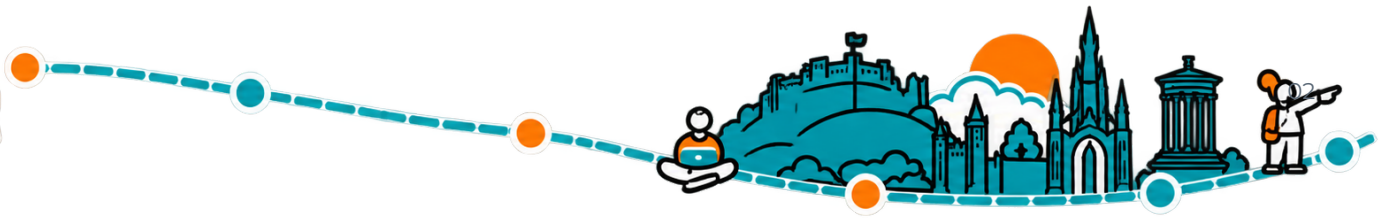
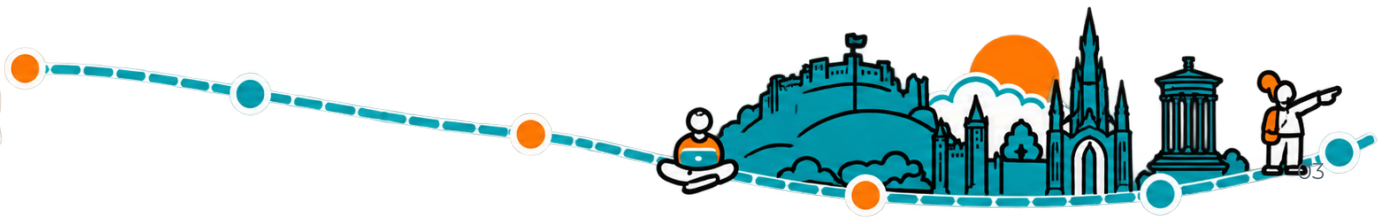


PRACTICE WHAT WE PREACH

We have spent two days examining this journey.

Now use it to make your own improvement decision.

DATA	INFORMATION	KNOWLEDGE	WISDOM	ACTION



DATA | WHAT DID YOU CAPTURE?

DATA | INFORMATION | KNOWLEDGE | WISDOM | ACTION

What should you not forget?

Harvest your evidence from the two days. Do not analyse it yet.

YOUR NOTES

Three things that stood out

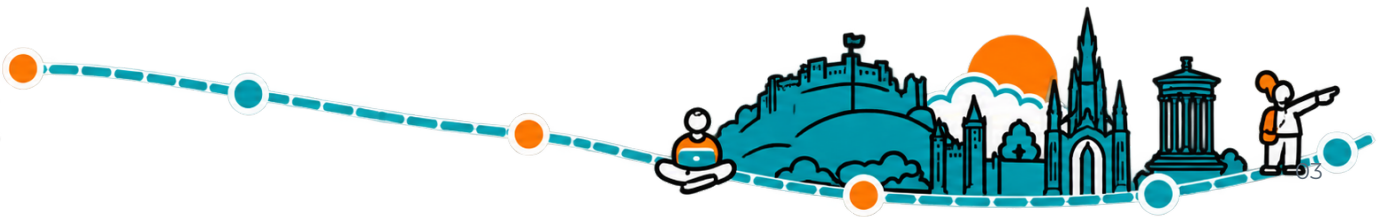
EXERCISES

Reporting gaps and Canvas insights

TODAY

Data confidence, tools, AI, roundtables





INFORMATION | WHAT DID YOU CAPTURE?

DATA | **INFORMATION** | KNOWLEDGE | WISDOM | ACTION

What connects your observations?

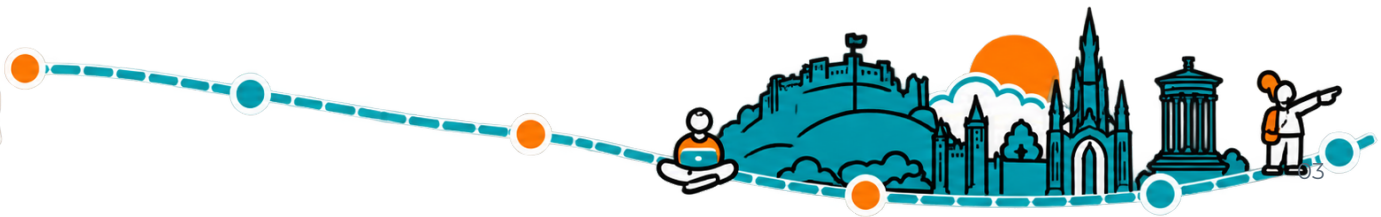
Move from a collection of notes to one or two meaningful themes.

LOOK FOR LINKS

Several reporting symptoms may share one cause.

TEST IT WITH SOMEONE

Who might you test this with?



KNOWLEDGE | WHAT DOES IT MEAN?

DATA | INFORMATION | **KNOWLEDGE** | WISDOM | ACTION

What does this tell you about your?

Move beyond the symptom. What might actually need to change.

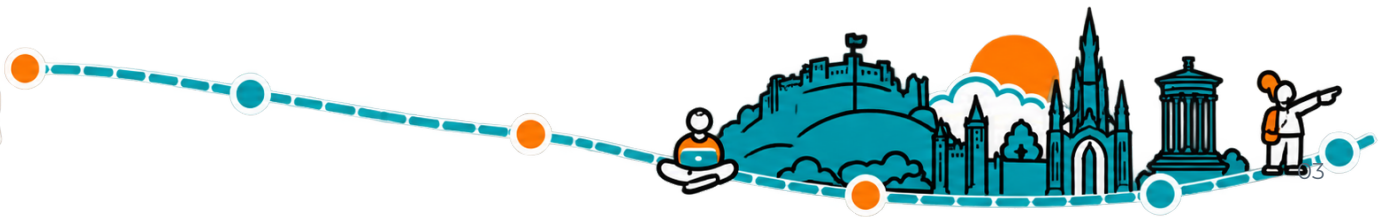
STATE AN IMPROVEMENT

"Our PMO could improve … because …"

KEEP A QUESTION OPEN

"Before we act, we need to understand …"





WISDOM | CHOOSE WHERE TO FOCUS?

DATA | INFORMATION | KNOWLEDGE | **WISDOM** | ACTION

What does this tell you about your PMO?

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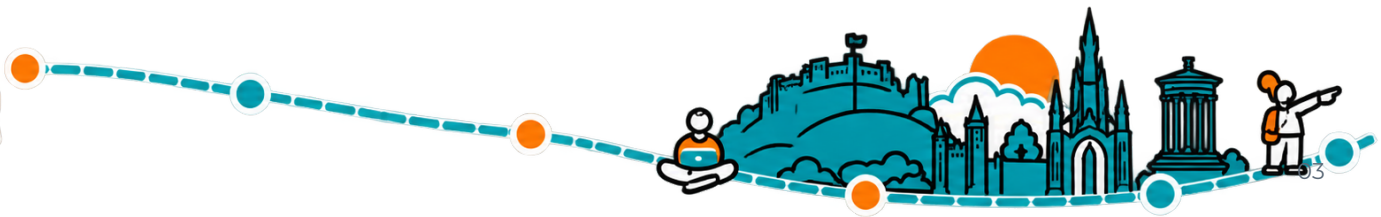


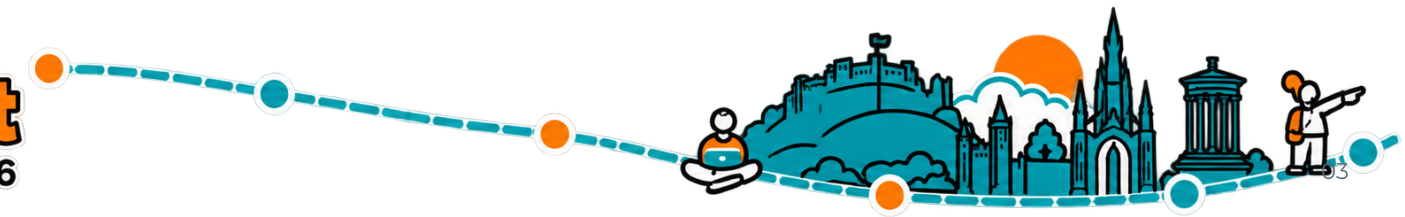
WISDOM | CHOOSE WHERE TO FOCUS?

DATA	INFORMATION	KNOWLEDGE	**WISDOM**	ACTION

What improvement is worth making?

A choice about where to start, not permission to implement everything.

VALUE	What difference could it make?	**INFLUENCE**	What can you affect?
FEASIBILITY	What could realistically happen?	**READINESS**	What needs checking or agreeing?



ACTION | YOUR FIRST 90 DAYS

DATA | INFORMATION | KNOWLEDGE | WISDOM | **ACTION**

How will you get it moving?

Plan your next steps—not the whole organisational change.

FIRST 10 DAYS

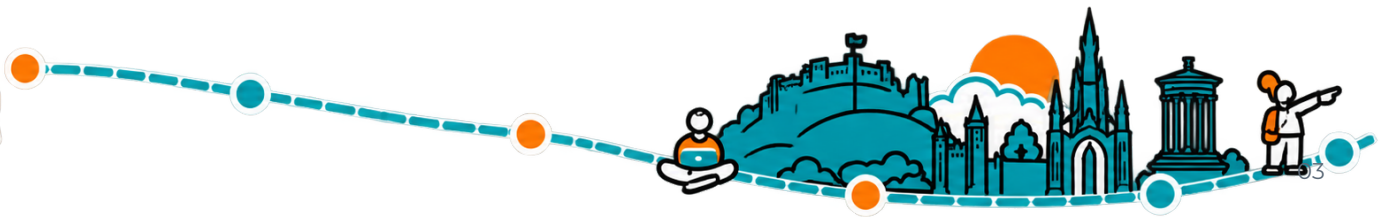
Who will you speak to?
What will you check?

BY 30 DAYS

What will you test or agree?

BY 90 DAYS

What progress could you show?



1 90 DAY ACTION PLAN

TURN INSIGHTS INTO ACTION

NEXT 30 DAYS START	DAYS 31–60 BUILD	DAYS 61–90 EMBED

MY FIRST ACTION
WITHIN 48 HOURS

2 MILESTONE ROADMAP

A SIMPLE JOURNEY FROM NOW TO LATER

30 DAYS	60 DAYS	90 DAYS
DATE:	DATE:	DATE:

3 TOP 5 PRIORITIES

FOCUS ON WHAT WILL MAKE THE BIGGEST IMPACT.

1
2
3
4
5

4 THEME TRACKER

GROUP ACTIONS BY THEME OR WORKSTREAM

PEOPLE	PROCESS
DATA & TECHNOLOGY	OTHER / ENABLERS

5 KANBAN ACTIONS

VISUALISE PROGRESS FROM TO DO TO DONE

TO DO	DOING	DONE

6 COMMITMENTS & OWNERS

CLARIFY ACTIONS, OWNERSHIP AND DUE DATES.

ACTION	OWNER	DUE DATE	STATUS

7 QUICK WINS VS BIGGER MOVES

BALANCE SHORT-TERM IMPACT WITH LONGER-TERM CHANGE.

QUICK WINS	BIGGER MOVES
ACTIONS I CAN TAKE SOON (0 – 3 MONTHS)	BOLDER ACTIONS FOR LONGER-TERM IMPACT (3 – 12 MONTHS+)

8 WEEKLY ROADMAP

SMALL STEPS. BIG PROGRESS.

MON	TUE	WED	THU	FRI

KEY FOCUS THIS WEEK

9 REFLECTION TO ACTION

TURN INSIGHTS INTO MEANINGFUL NEXT STEPS.

KEY INSIGHTS
What stood out? What did I learn?

MY NEXT STEP
What action will I take?

REMINDER TO SELF
How will I stay on track?

MY 90-DAY ACTION PLAN



TURNING INSIGHT INTO PROGRESS

A simple plan to help you turn what you've learned at the conference into practical action. Choose one focus, set out what you'll do, who can help and how you'll know it's making a difference.

MY FOCUS

The one thing I am going to build my 90-day plan around is...

NEXT 30 DAYS START	DAYS 31–60 BUILD	DAYS 61–90 EMBED
Get started and build momentum.	Develop, test and make progress.	Embed, refine and deliver impact.
KEY ACTIONS What will I do in the next 30 days?	KEY ACTIONS What will I do in days 31–60?	KEY ACTIONS What will I do in days 61–90?
SUPPORT I NEED Who can help? What do I need?	SUPPORT I NEED Who can help? What do I need?	SUPPORT I NEED Who can help? What do I need?
POTENTIAL BARRIERS What might get in the way?	POTENTIAL BARRIERS What might get in the way?	POTENTIAL BARRIERS What might get in the way?
SUCCESS LOOKS LIKE... How will I know I'm making progress?	SUCCESS LOOKS LIKE... How will I know I'm making progress?	SUCCESS LOOKS LIKE... How will I know I'm making progress?

HOW I WILL KNOW IT'S WORKING

What measures, evidence or feedback will show progress and impact?

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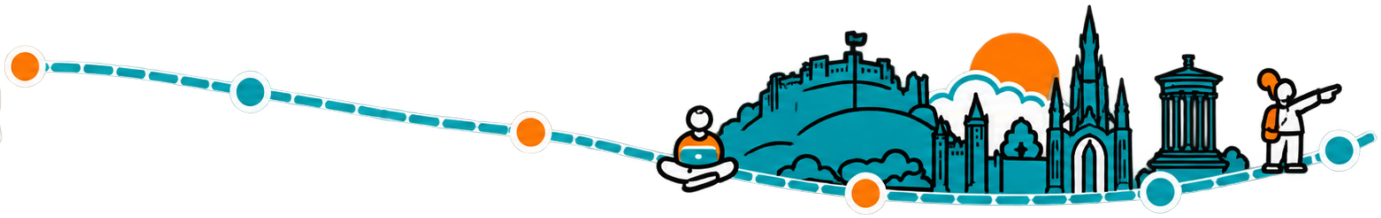


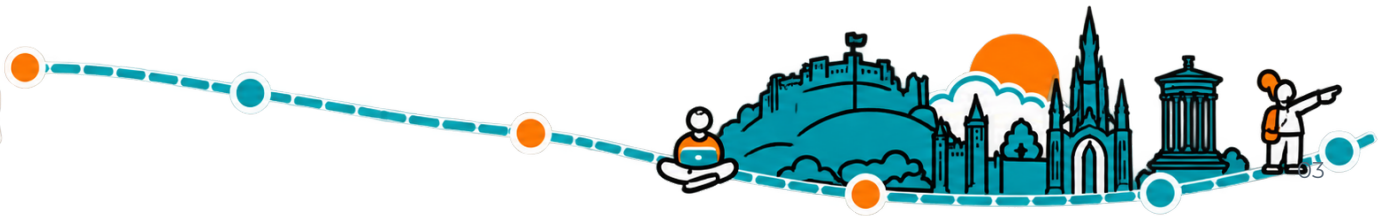
CONFERENCE ENDS | WORK STARTS

Complete this sentence and say it out loud to the person sitting next to you:

“The first thing I will do when I get back is . . . ”

KEEP THE CONVERSATION GOING

Join us for a follow-up webinar before Christmas.



END OF THE CONFERENCE

HOUSE OF PMO™
HOME TO PMO PROFESSIONALS

Day Two

That's a Wrap!

What has changed in your thinking today?

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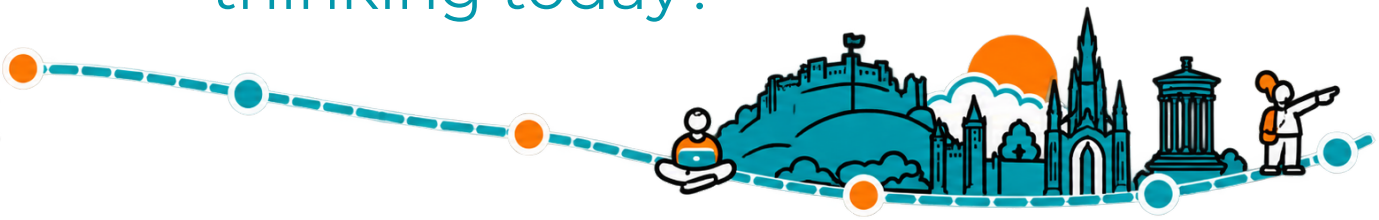

LET US KNOW WHAT YOU THOUGHT

The feedback is now live in the app!

Share your feedback with us and you could win a free ticket to our annual PMO Conference in London in June




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