HOUSE OF PMO™
HOME TO PMO PROFESSIONALS

PMO INSIGHT CONFERENCE EDINBURGH 2026

From Reporting to Insight

Building the Decision-Enabling PMO

Monday 16 and Tuesday 17 November 2026

EICC, Edinburgh



Workbook

House of PMO Insight Conference Edinburgh 26

ProSymmetry

RESOURCE PLANNING & FORECASTING SOFTWARE

Commit to what your people can deliver.

The next priority often needs the same people who are committed to everything else.

- Do we have the capacity?
- Which skills are a bottleneck?
- What needs to move? And to when?

Tempus brings resource management, capacity planning and portfolio decisions together so your PMO can answer those questions before commitments are made.

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WELCOME TO PMO INSIGHT CONFERENCE EDINBURGH



Two days to step away from the reporting cycle, ask better questions and think about how your PMO can help people make better decisions.

WHY WE'RE HERE

PMOs have always worked with data, reporting and information, but expectations are changing.

Leaders do not simply need more dashboards, more status updates or more information. They need to understand what it means, what matters, what might happen next and what they need to do about it.

That is why we are here.

PMO Insight is about the journey from reporting what has happened to helping the organisation understand, decide and act.

Across these two days we will explore how PMOs can strengthen the evidence, add context and meaning, build shared understanding, apply judgement and challenge and help turn insight into action. We will also look at the things that sit around the data too - such as confidence, behaviour, tools and AI.



IT'S A WORKING CONFERENCE TOO!

You are not here simply to sit and listen, you will hear real PMO experiences, work through practical exercises, challenge ideas with other delegates, talk with our Insight Partners and apply what you are hearing to your own PMO.

Use this workbook to capture your thinking: the questions, ideas, challenges and actions that matter to you. The larger table sheets capture our collective thinking and help us to bring the themes from Day 1 back into Day 2.

By the end of the conference, we want you to have:

- a clearer view of where your own PMO's data-to-action chain needs strengthening
- practical tools you can use back at work
- new questions to ask about reporting, data, tools and AI
- ideas and experiences from other PMO professionals
- one decision your PMO can support more effectively

DATA
INFORMATION
KNOWLEDGE
WISDOM
ACTION

DAY ONE / PMO INSIGHT CONFERENCE

10.30 — **Arrival, coffee and registration**
Collect your workbook and event materials, meet fellow delegates and settle in over coffee. The Partner Studio will also be open for early conversations with the event's Insight Partners.

11.00 — **Welcome to PMO Insight**
Eileen J Roden & Lindsay Scott | House of PMO

11.20 — **Why PMO Reporting Has to Change**
Eileen J Roden | House of PMO

11.50 — **Table Exercise: Where Does Reporting Fall Short?**
Eileen J Roden | House of PMO

12.10 — **PMO Practitioner Reality Stories**
Lucy, Pedro and Tanja | Healthcare, Finance and Higher Education

12.40 — **Lunch and Insight Partner Conversations**
Continue the morning's conversations over lunch and meet the Insight Partners. This is a chance to explore practical challenges around reporting, dashboards, tools, data quality and decision support.

13.40 — **A Real PMO Journey Towards Decision-Ready Insight**
Sarah Landen | PMO & Portfolio Manager, Bristol Airport

14.20 — **Decision-First Reporting: Using the Decision Canvas**
Eileen J Roden | House of PMO

15.05 — **Coffee and Clinics**
Bring a live reporting, dashboard, data or portfolio challenge to one of the themed Partner Studio conversations. Partners will help you explore where the data-to-action chain may be breaking and what you could investigate next.

15.35 — **Insight Partner Provocations**

16.15 — **From Knowledge to Wisdom: Building the Decision Story**
Cara Thompson | Data Viz and Storyteller

17.20 — **Day One Close**
Capture the most useful lesson from the day and reflect on what it means for your own PMO. The outputs created during Day 1 will be reviewed overnight and used to shape the opening of Day 2.

Conference ends at 17.30 - a short break before you join us for the quiz!

18.30 — **PMO Flashmob and Pub Quiz**
We're not finished yet! You're invited to join us at a traditional House of PMO social – PMO Flashmob – taking place at a local hostelry.

PMO Flashmobs are a mob of PMO professionals coming together for chats, drinks and nibbles. We like to help facilitate the conversation and we have the Great PMO Quiz lined up for you.

Closes 9pm.

DAY TWO

House of PMO Insight Conference Edinburgh 26

09.00 | **Arrival, coffee and registration**
Reconnect with other delegates over coffee and pastries before the second day begins. The Partner Studio will also be open for further conversations with the event's Insight Partners.

09.30 | **Welcome back: What did Day 1 turn into knowledge?**

09.40 | **From Reporting Office to Decision-Enabling PMO**
David Rolo | Rumo Intelligence

10.15 | **What Makes Data Decision-Ready?**

10.25 | **Data Confidence Lab: Finding the gaps behind the dashboard**
Michael Campbell | Project Data Specialist, Precision PMO

11.35 | **Coffee and Partner Studio Clinics**
Take a break and bring a live reporting, data, dashboard or portfolio challenge to one of the Partner Studio clinics. These are practical conversations designed to help identify where the data-to-action chain may be breaking and what you should investigate next.

11.55 | **Making PPM Tools Work for Your PMO**

12.35 | **Choose the Afternoon Roundtable Themes**

12.40 | **Lunch and Insight Partner Conversations**
Continue the morning's conversations over lunch and meet the Insight Partners. This is a chance to explore practical challenges around reporting, dashboards, tools, data quality and decision support.

13.35 | **The AI-enabled PMO: Practical Use Cases, Not Hype**
Sara Ellington | Tenable

14.15 | **AI Governance in Projects: The PMO's Emerging Role**
Emanuela Giangregorio | Author, AI Project Governance Framework

14.55 | **Scenario Exercise: AI has Entered the Steering Pack**

15.20 | **Coffee and Partner Conversations**
Take a break and continue the conversations raised by the AI case study and governance sessions. The Partner Studio will remain active, providing another opportunity to explore tools, controls, data challenges and practical approaches with partners and fellow delegates.

15.50 | **Roundtables: Building the Decision-Enabling PMO**

16.35 | **Group Playback: What Needs to Change?**

17.05 | **Your Next 90 Days: PMO Insight Action Plan**

17.30 | **Close**

DATA
INFORMATION
KNOWLEDGE
WISDOM
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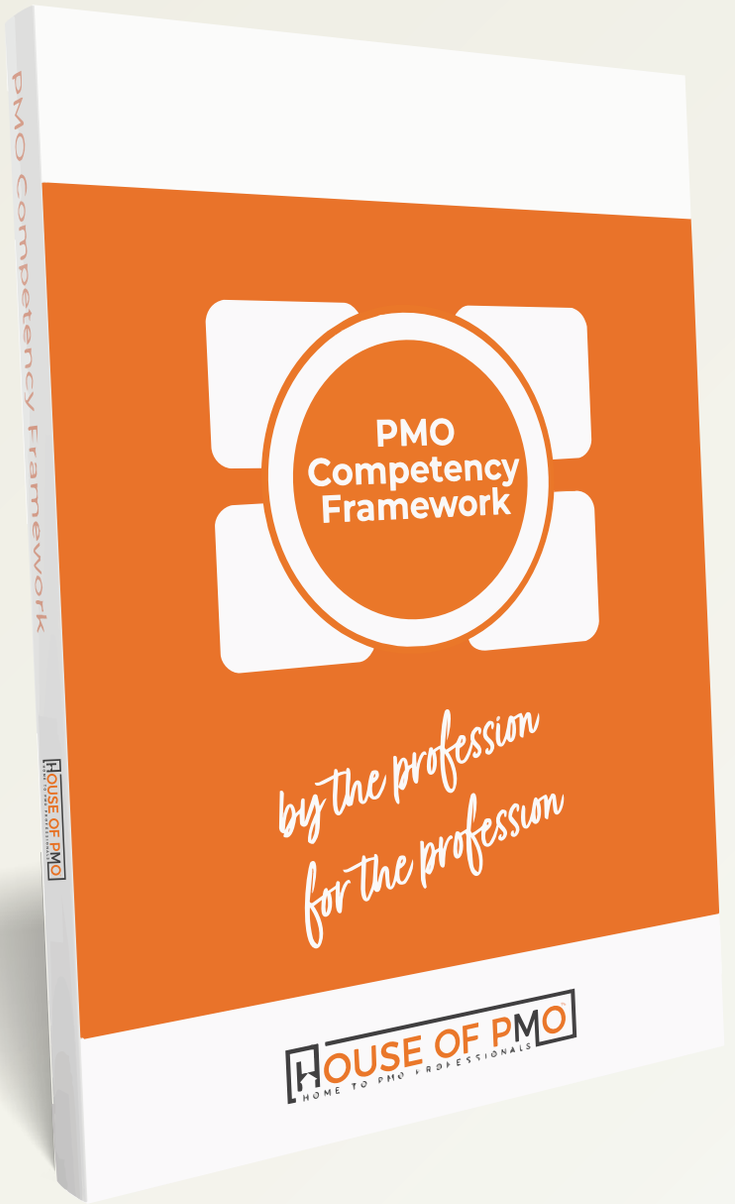
Assess Progress Develop



24
Competences across 4 domains

Role profiles for every PMO professional

Proficiency levels to assess and grow

Practical guidance to support your development

House of PMO Insight Conference Edinburgh 26

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Explore the full framework online

Assess your competences against a PMO role profile

Spot skill gaps and shape your development

Explore the Online Self-Assessment (Member only)

CONFERENCE APP GUIDE

House of PMO Insight Conference

The app is part of the conference experience — keep it handy throughout both days.

We'll use it to share updates, ask questions, run polls and help you connect with what's happening around the event.

KEEP AN EYE ON IT

We'll use the app throughout the two days to share any important messages, updates or changes.

Check in regularly so you don't miss anything.

HAVE YOUR SAY

There will be polls throughout the conference — some during sessions and others in the **Engage** area of the app.

Take part as we go. Your responses will help us see what the room is thinking.

ASK QUESTIONS — ANY TIME

Every session has its own Q&A area.

Open the session in the agenda, select Q&A, type your question and send it.

You don't need to wait until the end of a presentation — add questions whenever they occur to you.

MEET THE INSIGHT PARTNERS

Head to **Exhibitors** to find details about each of the conference partners.

You can see who they are, what they do and find out more before you visit them in the Partner Studio.

MAKE YOUR PROFILE YOURS

Take a minute to update your profile so other delegates can see who you are and where you're from.

It makes those "I recognise the name, but..." conference moments slightly easier!

AND YES... THERE'S A LEADERBOARD

The more you get involved — taking part, exploring the app and engaging with the conference — the more you can work your way up the leaderboard.

Competitive PMO people? Surely not.



The Q&A area is in each session.

Keep the app open. Join in. Ask questions. See what everyone else is thinking.

DATA
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DAY ONE - 11.00 - 11.20am

THE TWO-DAY JOURNEY

This conference moves from data to action over two days

Different sessions focus on different parts of the journey. Together they help you build understanding, gain new perspectives and take confident action.





WHERE DOES MY BIGGEST WEAKNESS SIT RIGHT NOW?

Choose one or two areas where you feel you need the most development right now.

- ☐ **Evidence** — Getting the right data and insight
- ☐ **Context** — Getting the right data and insight
- ☐ **Confidence** — Getting the right data and insight
- ☐ **Capability** — Getting the right data and insight
- ☐ **Action** — Getting the right data and insight

USE THE CONFERENCE WELL!

1. Use this workbook actively throughout the two days
2. Read the prompts before each session starts
3. Use the app and ask for help if you need it
4. Presentations are available as downloads

OPEN THE EVENT APP

We will be using the app throughout the two days - it's the place where we will be sharing links to resources, updates on the sessions and outputs as we go along. Get the details on the QR Code

DAY ONE - 11.00 - 11.20am

ATTEND WITH INTENTION

Use this opening session to decide what you want from the next two days

You are not expected to complete everything in full - jot down keywords, capture quick thoughts and add to these notes as the conference progresses.

WHAT DO I WANT TO LEAVE WITH?

What do I want to learn, explore or achieve from these two days?

MY PMO CHALLENGE OR DECISION

What decision am I carrying through these two days?

WHO ACTUALLY NEEDS TO MAKE OR OWN THIS DECISION?

Who is accountable? Who is affected? Who needs to be involved or consulted?

MY THREE QUESTIONS

What are the key questions I want answered?

1.
2.
3.

MY FIRST USEFUL ACTION

What is one thing I will do as a result of this conference?

DATA

INFORMATION

KNOWLEDGE

WISDOM

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WHY PMO REPORTING HAS TO CHANGE

Use this session to examine whether your current reporting is helping anyone decide what to do next

Use your workbook to jot down keywords, short notes, your thoughts, doodles . . .

“If nothing is decided or acted upon, why is the report being produced?”

Use this question to test whether reporting is still connected to its purpose

WHAT EVIDENCE OR REPORTING CURRENTLY INFORMS THE DECISION?

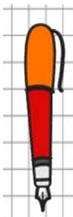
What does it really tell you?

WHAT ARE YOU PRODUCING THAT DESCRIBES ACTIVITY BUT DOES NOT HELP SOMEONE DECIDE?

Think about reports, packs, dashboards, the update cadences

WHAT IMPORTANT CONTEXT OR MEANING IS CURRENTLY MISSING FROM THE REPORTING?

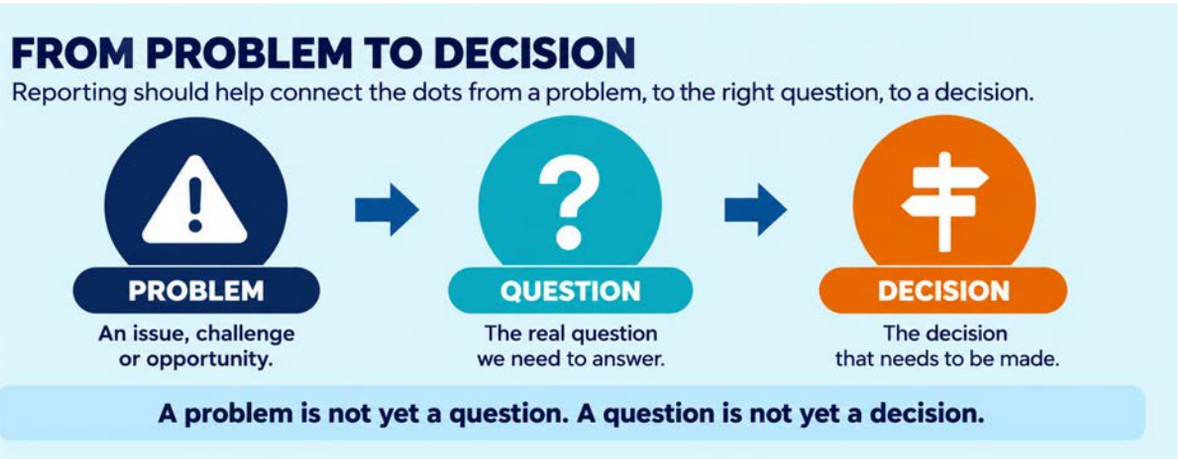
What would help somebody understand why it matters?



FROM REPORTING TO INSIGHT

A report can be accurate and still not be enough

Good reporting doesn't just describe what is happening - it helps people understand, decide and act.



Escalation Often Changes the Question

As something is escalated, the question tends to change from a local detail to a broader more strategic one

PROJECT LEVEL

"Which technical resource can we allocate to Project X?"

ESCALATED QUESTION

"Which work should slow down, stop or lose capacity?"

WHAT THIS MEANS FOR MY PMO

Where in your organisation are you producing reporting, but not helping people to decide?

ONE THING I MAY NEED TO CHANGE

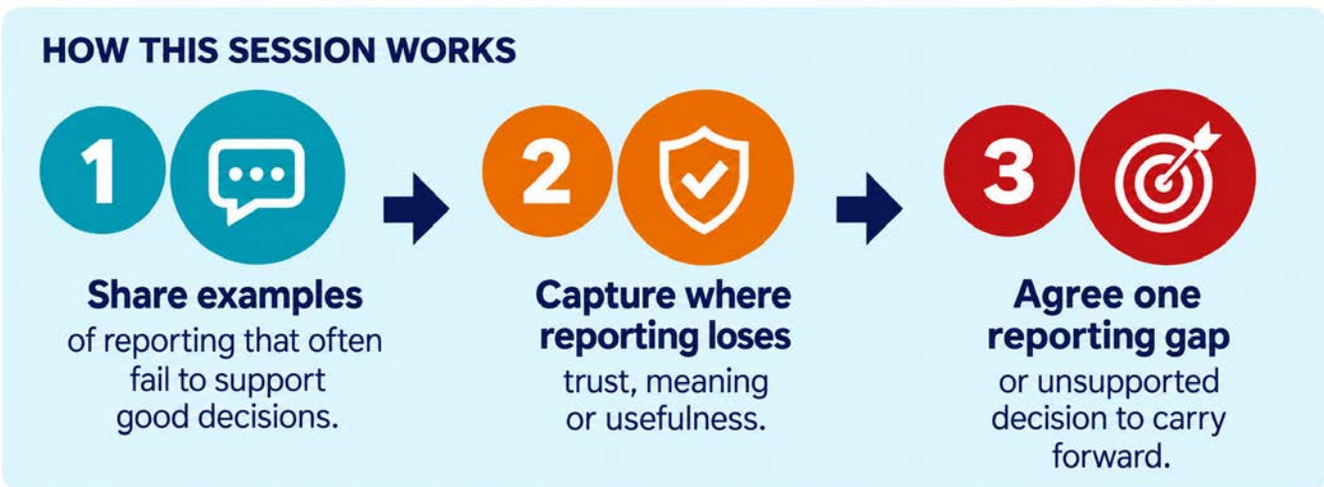
What is one change I can make as a result of this session?



FIRST TABLE EXERCISE: WHERE DOES REPORTING FALL SHORT?

You'll be working with your peers on this exercise and a larger exercise book has been provided for the team to work on.

The exercise is focused on diagnosing where reporting often fails to help good decisions.
Here's how this session works:



WHAT REPORTING EXAMPLE DO YOU HAVE TO SHARE?

The team will decide together which example/s to include

You can use the following three prompts to keep thinking about your own example in more detail.

WHERE DOES YOUR REPORTING EXAMPLE CURRENTLY LOSE:

TRUST:

MEANING:

USEFULNESS:

WHAT IMPORTANT QUESTION IS STILL LEFT UNANSWERED AFTER READING THE REPORT?

WHAT ONE REPORTING GAP OR UNSUPPORTED DECISION DO YOU WANT TO CARRY FORWARD?

DAY ONE - 11.50 - 12.10pm

TABLE DISCUSSION AND YOUR OWN THINKING

As you work through the exercise together, you can use the space below to capture any thoughts or ideas from the discussion





SPACE FOR YOUR OWN THOUGHTS

WHAT ARE THE KEY TAKEAWAYS FROM THE EXERCISE FOR YOU:

WHAT ONE THING MAY YOU NEED TO CHANGE?

Has the exercise made you think differently about the reporting you do and the decisions it enables?

MAKE SURE SOMEONE ON THE TEAM UPLOADS AN IMAGE OF YOUR EXERCISE



We will be busy behind the scenes collating all the exercise outputs from each team so we can share those insights with you too.

DATA
INFORMATION
KNOWLEDGE
WISDOM
ACTION

PMO PRACTITIONER REALITY STORIES

Capture examples, patterns and ideas from the three stories in ways that help your own thinking about reporting to better decision-support.

KEY POINTS, EXAMPLES, IDEAS AND REFLECTIONS

STORY ONE

STORY TWO

STORY THREE

WHAT MAY I WANT TO FOLLOW UP ON AND FIND OUT MORE?

WHAT MIGHT I WANT TO ACT ON OR APPLY?



DAY ONE - 12.10 - 12.40pm

PMO PRACTITIONER REALITY STORIES

Use these stories to capture what resonates, what you can take away and what you may want to explore further

WHICH STORY MOST RESONATES WITH YOU?

What stands out, feels familiar or helps you see your challenge differently?

WHAT PRACTICAL IDEA COULD YOU TAKE AWAY AND APPLY?

What could you borrow, test or adapt?

WHAT DO YOU WANT TO ASK, EXPLORE FURTHER OR FIND OUT MORE?

What would help you go deeper?

IT'S NEARLY TIME FOR LUNCH!



Use lunch to test a real PMO challenge through informal conversations

Head to lunch and wander through the Partner Insight area, take a look at some of the challenges that are there and pick one or two that resonate the most.



DATA
INFORMATION
KNOWLEDGE
WISDOM
ACTION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A 5X Leader
Gartner® Magic Quadrant™
for Strategic Portfolio Management
A 5X Leader
Gartner® Magic Quadrant™
for Adaptive Project Management
and Reporting
Take full control of your projects
and empower your teams
Come and speak to us on Stand 5!

CONVERSATION INTO ACTION

Take a little bit of time to capture your lunchtime conversations before we head into the afternoon sessions.



DAY ONE - 1.40 - 2.20pm

A REAL PMO JOURNEY TOWARDS DECISION-READY INSIGHT

Sarah Landen from Bristol Airport talks about their experiences moving beyond traditional reporting towards clearer, more useful insight. Use this page to capture the journey, the challenges and what stands out for your own PMO.

WHERE DOES YOUR PMO CURRENTLY LOSE SIGHT OF VALUE?

Think beyond delivery - where does the connection between investment, delivery, adoption and outcome become unclear?

WHAT DOES YOUR REPORTING MAKE EASY TO SEE - AND WHAT DOES IT HIDE?

Consider dependencies, capacity, affordability, trade-offs or risks that sit between individual projects?

WHERE COULD YOUR PMO HELP LEADERS MAKE A BETTER CHOICE?

Think about a current portfolio or investment decision where better context, challenge or insight would make a difference.



WHERE DOES VALUE GET LOST ALONG THE WAY?

A PMO JOURNEY

What are you hearing? Capture examples, phrases and moments from Sarah's story



> "Every project looked healthy. The portfolio did not."





DATA

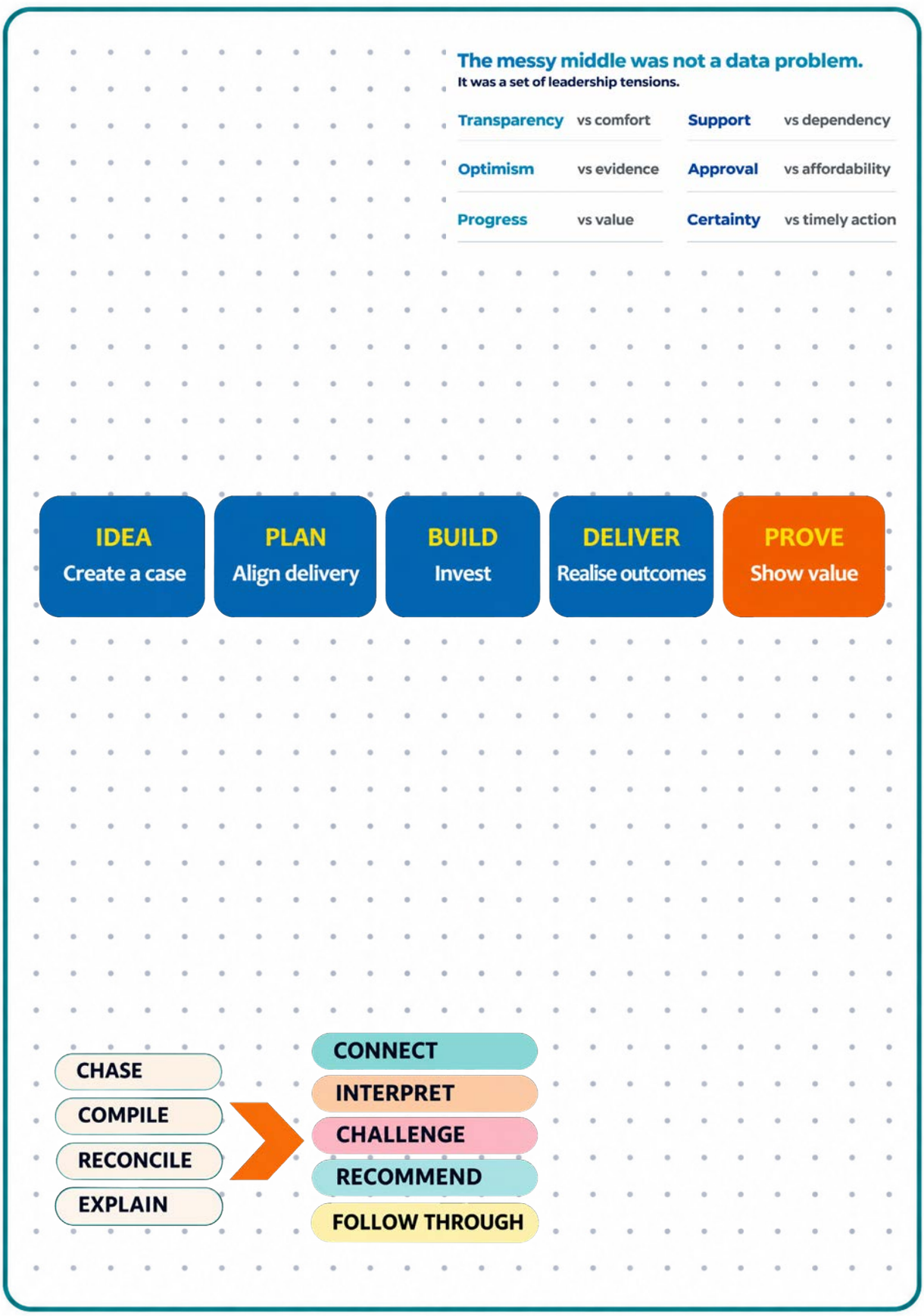
INFORMATION

KNOWLEDGE

WISDOM

ACTION

A REAL PMO JOURNEY TOWARDS DECISION-READY INSIGHT



WHAT RESONATED?







WHAT FROM THIS SESSION MADE YOU THINK DIFFERENTLY ABOUT THE ROLE YOUR PMO COULD PLAY?

What would you want to explore further after hearing Sarah's story?

POWER FRAMEWORK

Microsoft Partner

From PMO Data to Decision ready Insight



Connect project, portfolio, resource and risk data in the Microsoft Cloud.

Turn **fragmented reporting** into trusted insight, stronger governance and better decisions — **with AI-capabilities** built around the Microsoft ecosystem you already use.

Portfolio Visibility
See the bigger picture across projects, programmes and portfolios.

Connected Data
Bring project, resource, financial and risk information together.

Stronger Governance
Improve control, consistency and confidence in decision-making.

AI-Driven
Build the data foundations for smarter reporting and AI-driven insights.

Move beyond reporting. Enable better decisions.

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USING THE DECISION CANVAS

Designing reporting that supports better decisions

Good reporting doesn't just describe what is happening - it should help decision-makers understand, consider trade-offs and take action. Use this session to explore how the Decision Canvas can help you design more purposeful reporting.

WHAT IS THE DECISION YOUR REPORTING IS MEANT TO SUPPORT?

Be as clear as possible about the decision or question your reporting should help answer.

WHAT INFORMATION DO DECISION-MAKERS ACTUALLY NEED FROM THIS REPORT?

What do they need to know and how will it help them make a decision?

WHAT IS ONE CHANGE YOU COULD MAKE TO YOUR REPORTING TO BETTER SUPPORT THE DECISION?

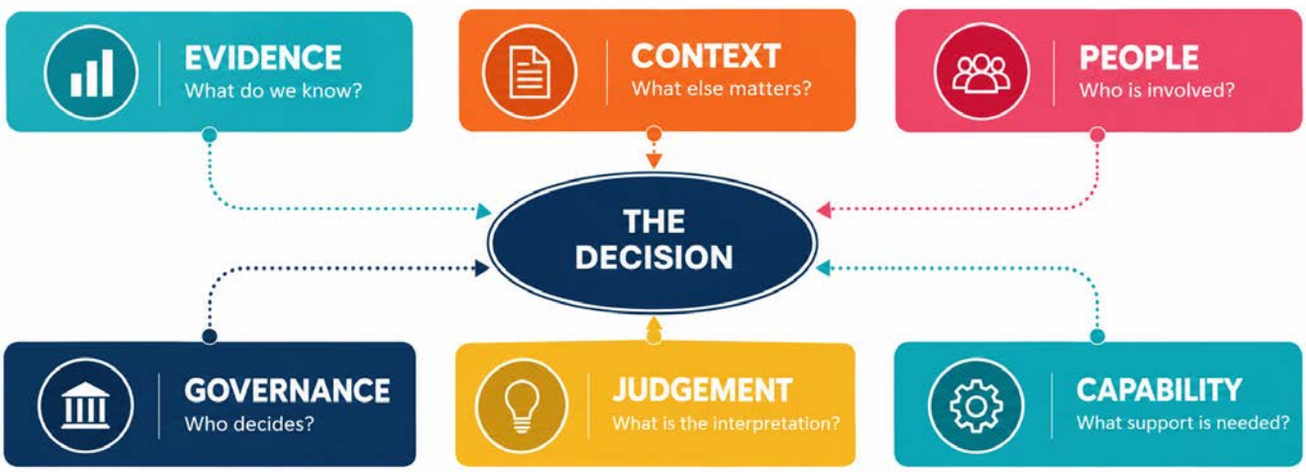
Think about structure, content, timing, audience or the story you tell

SPACE FOR YOUR OWN THOUGHTS

THE DECISION CANVAS

Decision-first reporting is not about making the decision, it is about checking whether the environment around the decision is strong enough to support it.

We start with the decision, then move around the different lenses to see what must be in place.



SESSION NOTES

Capture key insights as you listen.

Key Notes

THE EXERCISE

Work through the decision canvas on your own first

THE DECISION I NEED TO SUPPORT
What exactly is the decision that needs to be made?

EVIDENCE & INSIGHT
What do we know? What evidence do we trust? What is missing?

CONTEXT & CONNECTIONS
What else matters? Dependencies, constraints, priorities or trade-offs?

PEOPLE & STAKEHOLDERS
Who is affected, involved or needed before the decision?

GOVERNANCE & ACCOUNTABILITY
Who owns the decision? What authority or escalation boundaries matter?

JUDGEMENT & CONFIDENCE
What remains uncertain? Where is professional judgement needed?

CAPABILITIES & ENABLERS
What tools, process, analysis, facilitation or support are needed?

What is ready?
The evidence, context, people, authority and behaviours already strong enough to support the decision.

What needs strengthening?
What is missing, weak, unclear or not trusted enough to support a good decision.

Where are the boundaries?
Which trade-offs sit within this governance remit – and which would trigger escalation.

DAY ONE - 2.20 - 3.05pm

YOUR TABLE DISCUSSION

As you work through the exercise together, you can use the space below to capture any thoughts or ideas from the discussion





SPACE FOR YOUR OWN THOUGHTS

WHAT ARE THE KEY TAKEAWAYS FROM THE EXERCISE FOR YOU:

WHAT ONE THING MAY YOU NEED TO CHANGE?

Has the exercise made you think differently about the reporting you do and the decisions it enables?

MAKE SURE SOMEONE ON THE TEAM UPLOADS AN IMAGE OF YOUR EXERCISE

We will be busy behind the scenes collating all the exercise outputs from each team so we can share those insights with you too.



YOUR REFLECTIONS

REFLECTING ON MY DECISION CANVAS

What does this tell me about the environment around my decision?

WHAT LOOKS STRONG ENOUGH ALREADY?

What is already in place to support this decision? Where are the strengths?

WHERE IS THE BIGGEST GAP?

What appears to be the biggest barrier to a good decision? What needs more work or clarification?

WHAT FELT DIFFICULT TO DEFINE?

Where did I struggle, lack evidence or find the canvas messy or unclear?

WHAT NEEDS TO HAPPEN NEXT?

What should I verify, strengthen, discuss or escalate? What actions or conversations do I need to take forward?

ONE THING I WILL TAKE FORWARD

A single action, conversation or focus that will help me support this decision better.

IT'S BREAK TIME! TIME TO EXPLORE SOME PMO CHALLENGES

There are a number of different PMO challenges dotted around our Insight Partners which have been selected specifically with you in mind. During this coffee break, why not find out more about them and see what ideas they give you?



PMO Learning

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Strengthen your skills.

Apply what you learn in the world.

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Gain practical skills you can use immediately.

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Courses to fit your schedule and goals.

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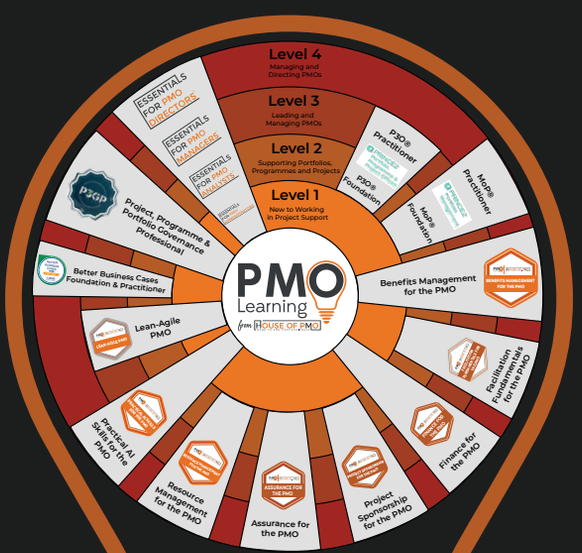
The PMO Training Wheel



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www.training.houseofpmo.com

LEARN
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MAKE AN IMPACT

INSIGHT PARTNER PROVOCATIONS

Use these short provocations to spot recurring problems, practical ideas and questions worth exploring in your PMO



As you hear provocations from our lightning talks - each speaker has just five minutes - think about the problem you're listening to, what the practical lesson/s there are - and think about your own PMO and the question you should be asking.

CAPTURE ACROSS THE FIVE

1 **PROBLEM I HEARD**

_____

_____

_____

PRACTICAL LESSON

_____

_____

_____

QUESTION TO INVESTIGATE

_____

_____

2 **PROBLEM I HEARD**

_____

_____

_____

PRACTICAL LESSON

_____

_____

_____

QUESTION TO INVESTIGATE

_____

_____

4 **PROBLEM I HEARD**

PRACTICAL LESSON

QUESTION TO INVESTIGATE

5 **PROBLEM I HEARD**

PRACTICAL LESSON

QUESTION TO INVESTIGATE

3 **PROBLEM I HEARD**

PRACTICAL LESSON

QUESTION TO INVESTIGATE

WHAT RESONATED?

Use these short provocations to spot recurring problems, practical ideas and questions worth exploring in your PMO

WHICH RECURRING PROBLEM SOUNDS MOST LIKE SOMETHING AFFECTING YOUR PMO?

WHAT PRACTICAL LESSON COULD IMPROVE THE WAY YOUR PMO WORKS?

Consider ideas, approaches or examples shared

WHAT WAS YOUR KEY TAKEAWAY FROM THIS SESSION?

What do you want to make sure you remember later?

What might this mean for my PMO?

_____

_____

_____

One thing I'll explore. . .

_____

_____

_____





HOTPMO

Success Hub
Sharper. Faster. Smarter.

Why would a PMO Consultancy tell you NOT to outsource your PMO?

Join the conversation in the Partner Studio

Still being seen as the team that just chases updates?

Does anyone change a decision because of your report?

Where does AI fit with the future of PMO?

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FROM KNOWLEDGE TO WISDOM: BUILDING THE DECISION STORY

Time to get practical again with Cara Thompson with a data-visualisation challenge - let's see if we can turn some half-baked data into a recipe for better decisions!



House of PMO is hosting the next season of the Great PMO Bake-Off!
Your task is to use the data provided to create a graph that helps someone make a decision. We want to move from "look at all this data!" to "here's a clear graph that supports decision-making"

Your users



Cara

Cara is looking to get a good number of viewers; she doesn't really know what counts as 'good'.



Aaron

Aaron is in charge of food supplies; he is also friends with Mel & Sue's agent.

Bake-Off data by series

Series	Viewers start	Viewers end	Hosts	Judges	Choc bakes	Rasp bakes	Orange bakes
1	2.24	2.75	Mel & Sue	Paul & Mary	20	6	8
2	3.10	5.06	Mel & Sue	Paul & Mary	30	12	6
3	3.85	6.74	Mel & Sue	Paul & Mary	25	8	7
4	6.60	9.45	Mel & Sue	Paul & Mary	21	9	9
5	8.51	13.51	Mel & Sue	Paul & Mary	28	15	10
6	11.62	15.05	Mel & Sue	Paul & Mary	20	6	6
7	13.58	15.90	Mel & Sue	Paul & Mary	28	7	12
8	9.46	10.04	Noel & Sandy	Paul & Prue	7	2	9
9	9.55	10.34	Noel & Sandy	Paul & Prue	14	6	11
10	9.62	10.05	Noel & Sandy	Paul & Prue	13	5	5

Use the data as provided. Part of the exercise is deciding what context is missing and what else your user might need to know.

Fictional scenario created for the exercise.

LET'S MAKE A GRAPH!

Step 1: Refine the focus

Before you bake the graph, get the recipe right!

1 What do the users *really* want to know?

2 What additional context would be helpful in interpreting the data?

3 Which user are you going to choose to make a graph for?

☐ Cara ☐ Aaron

Step 2: Design your graph

Time to turn your thinking into a graph!

1 What type of graph will you use?

Be inspired

2 What is encoded using colour?

3 What can you do to add context to the lines/dots/squiggles?

LET'S MAKE A GRAPH!

Step 3: Decide what colours you're going to use

- Look for inspiration on Google Images
- Make the colours on-brand with the monochromeR app
  - The **House of PMO** orange is **#E77005**

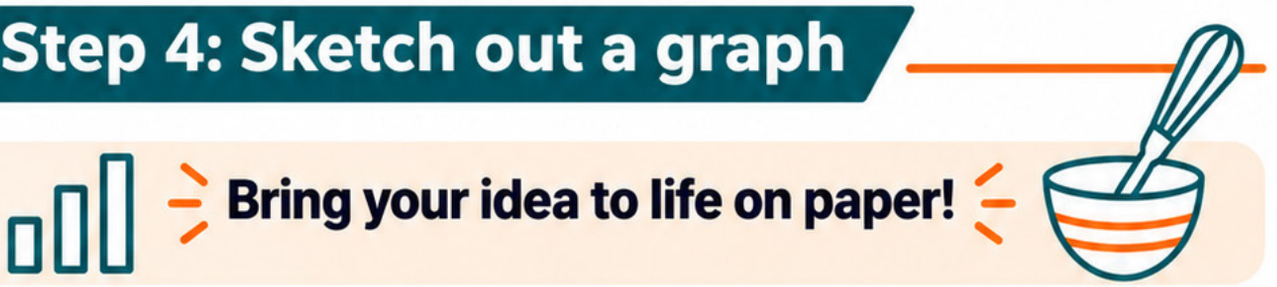


- Check they are accessible and tweak them if they aren't

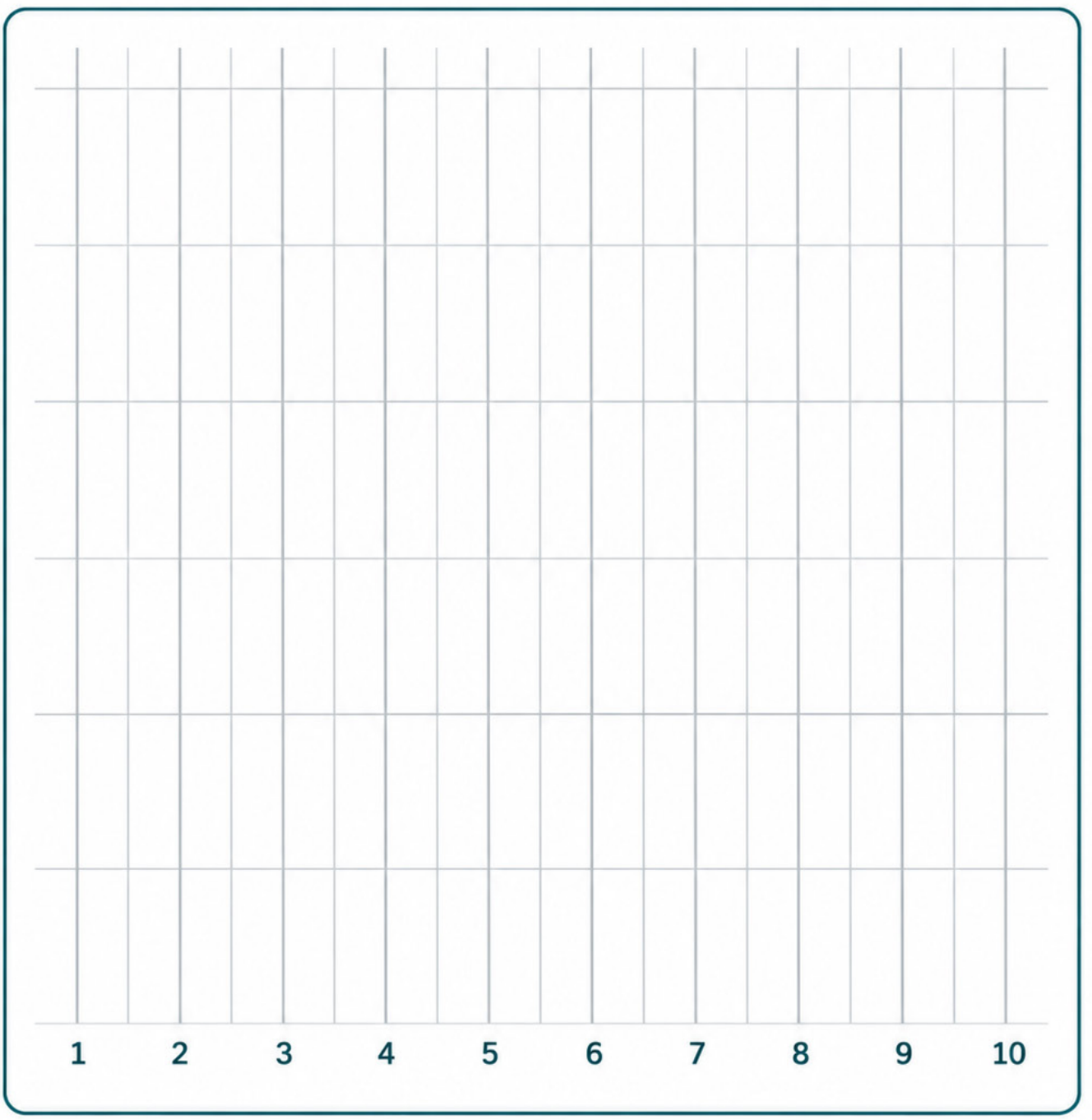
Concept	Colour	House of PMO version
e.g. chocolate	*e.g. brown*	*e.g. #FDACBB*
		#
		#
		#
		#
		#
		#



Step 4: Sketch out a graph



Bring your idea to life on paper!



Step 5: Your user needs a reassuring headline

Turn your graph into a clear story and next step!

1 How would you summarise the story of the graph for them in one sentence?

2 What action should they take?

One extra thing...

You'll want a Red-Amber-Green set of colours to help monitor the progress of different components of the project as the event draws near.

3 What needs to draw most attention? Celebrating success or flagging something has gone off track - or both?

What colours shall we use?

- Check your text-to-background contrasts

Concept	Colour	Accessible on-brand version	Text colour
e.g. bad	*e.g. red*	*e.g. #FDACBB*	*e.g. #2c3d4f*

Additional resources

- 10 tips for accessible graphs
- Setting up a custom PowerBI theme
- Creating your own dataviz design system

** No, this isn't true. But it was a fun idea!*

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DAY ONE IS COMING TO A CLOSE: BEFORE WE FINISH

Pause, look back, and see what has changed. We've covered a lot today, before we finish, flick back through your workbook and capture what has changed and what you don't want to lose.

GO BACK THROUGH TODAY - LOOK FOR ANYTHING YOU'VE UNDERLINED, CIRCLED, MARKED FOR FOLLOW UP OR WANT TO REMEMBER

Something that surprised me: _____

_____

Something I highlighted: _____

_____

Something that made me laugh: _____

_____

A question I still have: _____

_____

Something worth following up: _____

_____

WHAT'S DIFFERENT NOW?

Think back to the decision, challenge or question you brought to the conference this morning, What do you see differently now?

What's on the App?

Did you have a chance to see what other people have been posting about today?

DAY ONE - 5.20 - 5.30pm

LOOKING AT IT ALL A BIT DIFFERENTLY

If you've enjoyed the approach we've taken with this year's conference and the workbook you might like some of these final prompts of the day



THE PMO FLASHMOB QUIZ: JOIN US FOR FOOD & DRINKS



WELCOME TO DAY TWO

We're getting ready for day two - but before we kick off, we're going to take a moment to think about what we learnt from day one.
Take a moment to think about these questions:

WHAT DO REMEMBER HEARING YESTERDAY THAT RESONATED WITH YOUR OWN PMO?

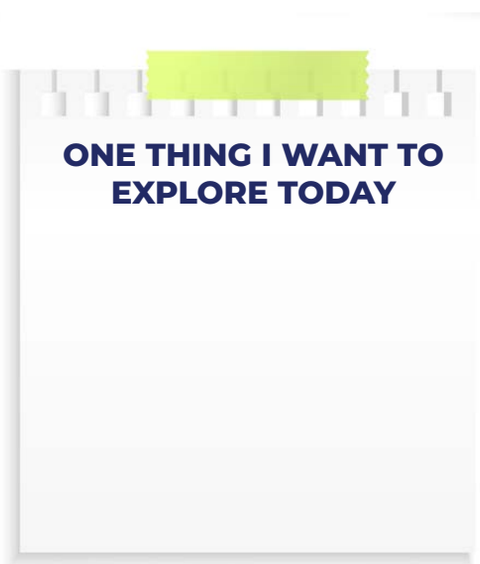
IS YOUR PROBLEM UNIQUE, OR PART OF A WIDER PMO PATTERN?

How does what you heard on Day 1 help you see the bigger picture?

DOES DAY 1 EVIDENCE CHANGE WHAT YOU THINK NEEDS FIXING?

What new insights might mean you need to adjust your focus or approach?



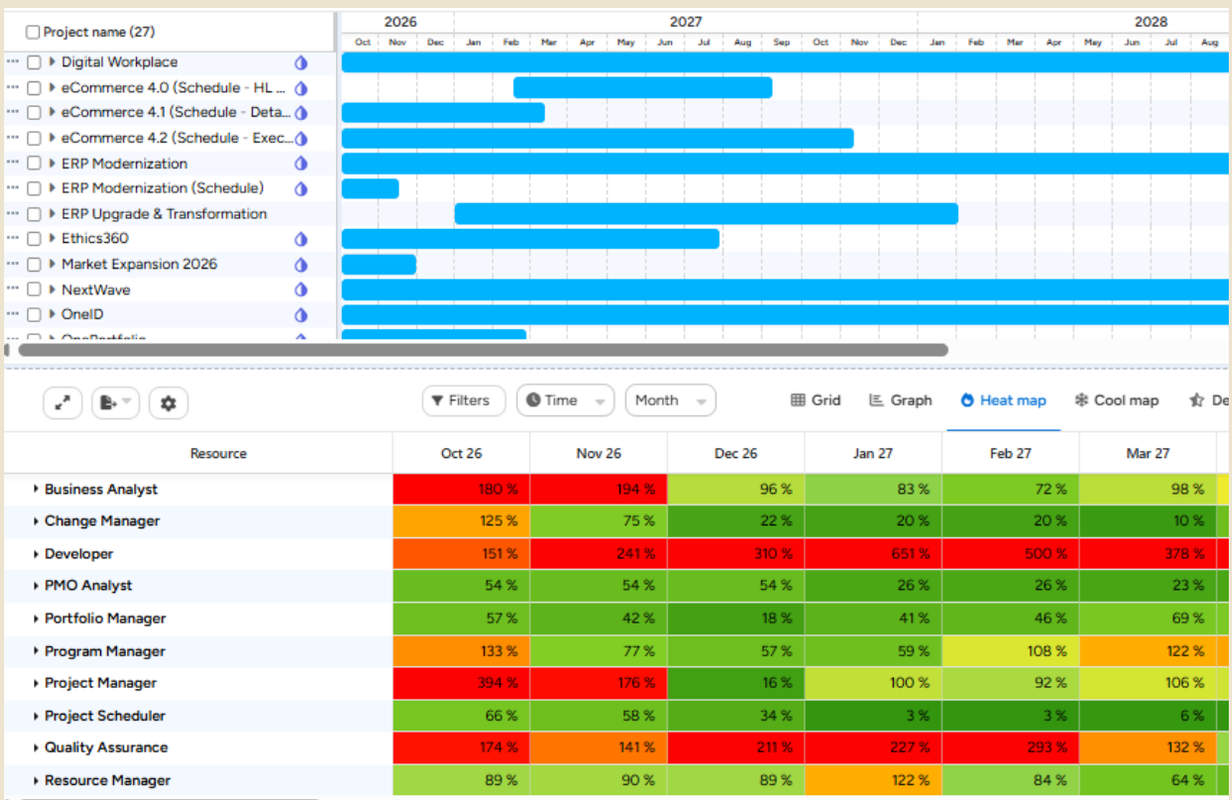


WHAT WE LEARNT YESTERDAY



See what's possible before you commit.

WHAT-IF MODELING IN TEMPUS



Resource	Oct 26	Nov 26	Dec 26	Jan 27	Feb 27	Mar 27
Business Analyst	180 %	194 %	96 %	83 %	72 %	98 %
Change Manager	125 %	75 %	22 %	20 %	20 %	10 %
Developer	151 %	241 %	310 %	651 %	500 %	378 %
PMO Analyst	54 %	54 %	54 %	26 %	26 %	23 %
Portfolio Manager	57 %	42 %	18 %	41 %	46 %	69 %
Program Manager	133 %	77 %	57 %	59 %	108 %	122 %
Project Manager	394 %	176 %	16 %	100 %	92 %	106 %
Project Scheduler	66 %	58 %	34 %	3 %	3 %	6 %
Quality Assurance	174 %	141 %	211 %	227 %	293 %	132 %
Resource Manager	89 %	90 %	89 %	122 %	84 %	64 %

See where demand exceeds capacity.
Understand how projects and programmes compete for the same people, roles and skills

Explore all options.
Use what-if modeling to test changes to priorities, roles and timing without changing your live plan.

Give leaders a recommendation.
Show what can be delivered, what needs to move and the trade-offs behind the proposed plan.

Visit **prosymmetry.com** to learn more.

FROM REPORTING OFFICE TO DECISION-ENABLING PMO

David Rolo explores what changes when a PMO moves beyond producing reports and starts helping the organisation interpret evidence, spot patterns, frame choices and support better decisions.

The session looks at the shift from reporting, through insight, towards a more decision-enabling PMO - including the role of AI, the capabilities and relationships that matter, and the line between supporting a decision and actually owning it.

WHERE DOES YOUR PMO SPEND MOST OF ITS TIME TODAY?

Reporting what is happening, interpreting what it means or helping leaders decide what to do next?

WHAT WOULD HELP YOUR PMO MOVE ONE STEP FURTHER TOWARDS DECISION-ENABLING?

Think about capability, confidence, relationships, technology or access to better context.

WHERE SHOULD YOUR PMO ENABLE THE DECISION - AND WHERE MUST OWNERSHIP REMAIN ELSEWHERE?

What should the PMO frame, challenge or recommend and what must stay with the accountable owner?



WHERE DOES YOUR REPORTING SIT TODAY?

Three perspectives, one journey



Gordon
Reporting PMO
Data + Information

"What happened?"



Aisha
Insight-led PMO
Knowledge

"Why? What's the pattern?"



Fiona
Decision-enabling PMO
Wisdom + Action

"What should we do, and what will it cost us?"

Where does your PMO spend most of its week?

Circle one. Pick where your team spends most of its week, not your best day.

- A **Reporting PMO** — Data + Information
- B **Insight-led PMO** — Knowledge
- C **Decision-enabling PMO** — Wisdom + Action

Your prompts for this session

1. **What uncertainty do you need to make visible rather than eliminate?** — Judgement & Confidence

2. **Who needs confidence in the evidence, and what would create that confidence?** — People & Stakeholders

3. **Which part of your problem could genuinely be improved by technology?** — Capabilities & Enablers




MY 90 DAY ACTION PLAN
REMINDER

WHERE DOES YOUR REPORTING SIT TODAY?

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

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.

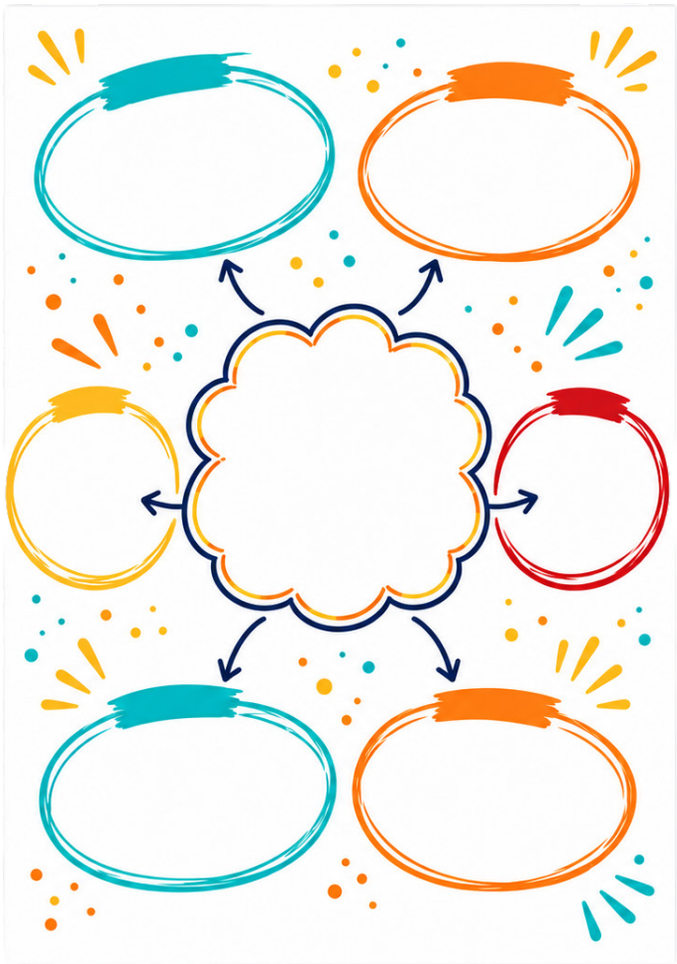


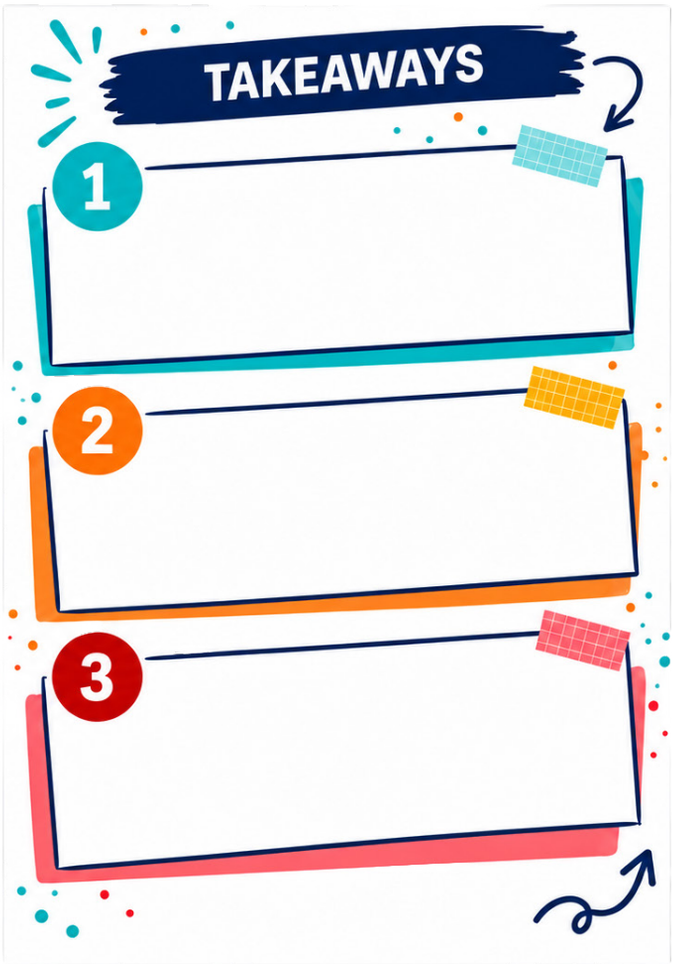
stories.rumoiq.com/?org=pmo-insight

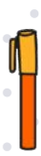
Keep going after the room: a short PMO track, 10 minutes a day

WHAT MAKES DATA DECISION-READY?

Before we get into the next session - we take a pause as Eileen asks us what makes data decision ready?











THE DATA CONFIDENCE LAB

Good decisions don't need perfect data, but they do need data we understand, question and trust. In this practical exercise, Michael Campbell will help you test the data behind a real PMO decision, spot where confidence starts to wobble, and identify what you would verify or improve first.



WHAT DATA DO YOU RELY ON MOST FOR YOUR CHOSEN DECISION?

Which reports, measures, systems or conversations shape the picture?

WHERE ARE YOU LEAST CONFIDENT IN THAT DATA?

Think about age, ownership, assumptions, completeness or conflicting sources.

WHAT WOULD MAKE YOU TRUST IT MORE?

What would you verify, compare or understand better?

THE DATA CONFIDENCE LAB EXERCISE

TEAM EXERCISE



TEST YOUR DATA CONFIDENCE

Now take the thinking to your table.

Choose one real PMO decision or delivery issue that someone at the table knows well. Using the A3 sheet, compare the data sources behind it, look at how often they are updated, how useful and trustworthy they are, and where the gaps or mismatches sit.

The aim is not to design the perfect data solution. It is to notice where confidence starts to wobble, what signals are worth paying attention to, and what you would verify or improve first.

1 WHAT DID THE EXERCISE MAKE YOU NOTICE?

What stood out, surprised you or challenged an assumption about your data?

2 WHAT WOULD YOU VERIFY OR IMPROVE FIRST?

What is the one thing you would take back to your PMO and look at more closely?

THINGS I DON'T WANT TO FORGET...

What's on the App?

Make sure you upload your team's exercise to the app!

MY 90 DAY ACTION PLAN

REMINDER

DAY TWO - 11.35 - 11.55am

COFFEE AND PMO CHALLENGES

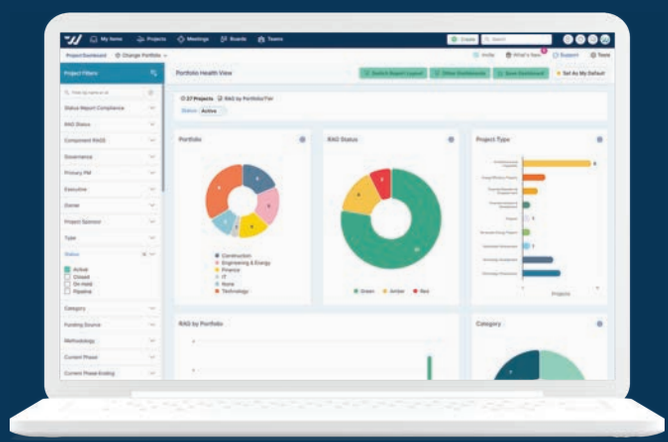
Take a break and bring a live reporting, data, dashboard or portfolio challenge to one of the Partner Studio clinics. These are practical conversations designed to help you identify where the data-to-action chain may be breaking and what you should investigate next.



LOOKING FOR PMO SOFTWARE?

Fluid

- AUTOMATED REPORTING
- RESOURCE CAPACITY & UTILISATION
- PROJECT PORTFOLIO DASHBOARDS
- ACCURATE PROJECT COST TRACKING
- AI, GOVERNANCE & BEST PRACTICES
- GO LIVE IN 4-8 WEEKS!



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4.8 out of 5 stars

A comprehensive reference guide to all the services which are offered by the PMO to an organisation



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Or Buy on amazon

DAY TWO - 11.55 - 12.35pm

MAKING PPM TOOLS WORK FOR YOUR PMO / PANEL SESSION

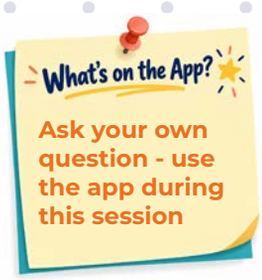
Technology can help us work smarter, but not everything is a tool solution. This panel explores where tools add real value, where their impact might be limited and what still requires human judgement, context and change.

WHAT IS THE DECISION PROBLEM I'M HOPING BETTER TOOLS COULD HELP WITH?

WHERE DO TOOLS CURRENTLY HELP IN MY PMO?

What tools or technology are already making a positive difference?

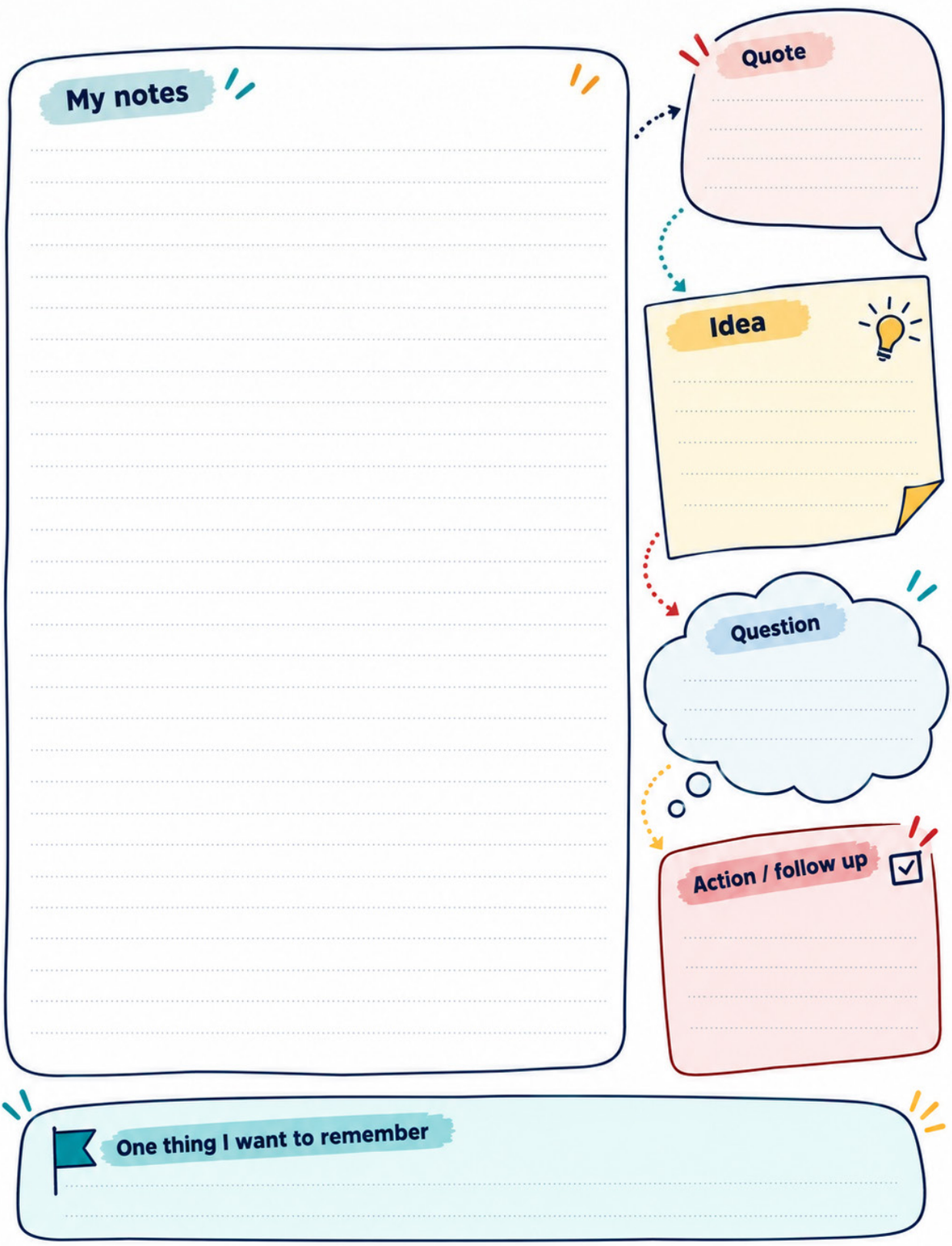
WHERE ARE WE EXPECTING A TOOL TO SOLVE A PEOPLE, PROCESS OR JUDGEMENT PROBLEM?





SPACE FOR YOUR OWN THOUGHTS

PANEL SESSION NOTES



DAY TWO - 12.35 - 12.40pm

LOOKING AHEAD TO THE ROUNDTABLE DISCUSSIONS

Now it's time to choose the afternoon roundtable themes. The questions available for the roundtables are grouped into 5 different categories. Your table will be choosing three different questions to explore - ideally from different categories. In the session this afternoon, you'll be discussing two of them.

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?

Session Choice 1

Session Choice 2

Session Choice 3

LUNCHTIME LIVE DEMOS







DATA
INFORMATION
KNOWLEDGE
WISDOM
ACTION

THE AI-ENABLED PMO: PRACTICAL USE CASES, NOT HYPE

AI can help PMOs move beyond manual reporting and administration by spotting patterns, bringing data together and surfacing insights that would otherwise take significant effort to uncover.
This session from Sara Ellington looks at practical examples of how AI can support delivery insight, portfolio analysis and integrated reporting - while keeping human judgement, validation and decision-making firmly in the loop.

PRACTICAL WAYS TO USE AI IN THE PMO

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 for a clearer, more complete view.

EXAMPLE: THE OVERCOMMITMENT PATTERN

AI was used to analyse sprint data, which revealed:

~20%
of committed work was completed

Key bottlenecks
including UAT and specific capability areas

Concentration of work
with high volumes held by a small number of owners



THE AI-ENABLED PMO

A SIMPLE CHECK FOR RELIABLE RESULTS

1. **EXTRACT SUMMARY**
   Get the key insight or analysis from the AI output.
2. **VERIFY GROUND TRUTH**
   Check the results against the source data.
3. **SHOW WORK**
   Ask for the method, logic or calculations used.
4. **LANGUAGE PRECISION AUDIT**
   Check for vague terms, overclaims or assumptions.

WAYS TO CHECK AI-GENERATED ANALYSIS

- Run the analysis twice independently (to test consistency).
- Compare any differences and understand why they exist.
- Tag anything inferred or assumed as needing validation.
- Sanity-check the results against what you already know.

NOT ALL INSIGHTS NEED TO BE DASHBOARDS

AI can analyse large volumes of data, surface recurring themes and highlight where automation could remove future work.



FROM INSIGHT TO ACTION

FIND FRICTION
Where is work slow, manual or unnecessarily difficult?

LEVERAGE AI
Where could AI create transparency, insight or efficiency?

REALISE VALUE
What difference would that make for the organisation?

DAY TWO - 1.35 - 2.15pm

THE AI-ENABLED PMO: PRACTICAL USE CASES, NOT HYPE

WHERE COULD AI GENUINELY STRENGTHEN THE DATA, INFORMATION OR KNOWLEDGE SUPPORTING YOUR DECISION?

WHERE COULD AI REMOVE FRICTION IN OUR PMO?

WHAT PATTERN MIGHT ALREADY EXIST IN OUR DATA THAT WE ARE NOT CURRENTLY SEEING?





verto

AI ISN'T YOUR BIGGEST CHALLENGE

YOUR PMO DATA MIGHT BE

Everyone is talking about AI, but most organisations are still struggling to trust their data.
AI doesn't fix poor data. It simply processes it faster.

The organisations getting the most value from AI aren't starting with AI.
They're starting with trusted data, consistent reporting and clear governance.

Once their data is trusted, our clients use Verto Intelligence to:

- **Monitor portfolio health**
- **Surface delivery risks**
- **Identify gaps and inconsistencies**
- **Provide better insight for decision-makers**
- **Reduce reporting effort and administrative burden**

Come and discuss the challenge with us during the event.

Verto helps organisations turn trusted portfolio data into better decisions.

vertocloud.co.uk

verto intelligence

AI GOVERNANCE IN PROJECTS: THE PMO's EMERGING ROLE

Emanuela Giangregorio takes to the stage as we explore AI governance in projects, focusing on evidence, quality, uncertainty, accountability, assurance, controls and escalation before AI-supported outputs influence action and the PMO's emerging role.

How can the PMO provide assurance that AI use in projects is ethical, efficient and effective?

This is where the PMO has an emerging governance role.

THE PMO HAS TWO GOVERNANCE ROLES

1 EMBED AI GOVERNANCE INTO THE PROJECT GOVERNANCE FRAMEWORK

Projects shouldn't have to invent their own AI governance. The PMO can update the existing project governance framework so every AI-assisted project has consistent governance.

What could become part of our governance framework?

- ☐ AI Assistance Plan
- ☐ Data Readiness Assessment
- ☐ AI Assistance Risk Register
- ☐ AI Usage Report
- ☐ AI Lessons Learned
- ☐ Something else: _____

2 ASSURE AI-ASSISTED PROJECT DELIVERABLES

The PMO needs to provide assurance that AI is being used in a way that maximises its benefits and reduces the related risks.

Good assurance begins with good questions.

THREE POINTS IN THE GOVERNANCE JOURNEY

1 FOUNDATION

Before or early in delivery

- Which AI tools will be used, and for what?
- What data do they need?
- Is that data available, suitable and approved for use?
- What could go wrong?

My notes / questions

2 ACTIVATION

While AI is being used

- Is AI being used as planned?
- Is it actually adding value?
- Where is human oversight visible?
- Are AI-related issues being identified and reported?

My notes / questions

3 EVALUATION

Looking back and learning

- Was AI used within the agreed boundaries?
- How well did humans and AI work together?
- What should we continue, stop or improve?

My notes / questions

AI GOVERNANCE IN PROJECTS

SESSION NOTES

Capture key insights as you listen.

Key Notes



AI GOVERNANCE IN PROJECTS: THE PMO's EMERGING ROLE

FIVE POSSIBLE RESPONSES

1 TRUST

Accept the AI-assisted output as fit for purpose under normal project governance.

2 VERIFY

Obtain additional evidence or validation before relying on the AI-assisted output.

3 CHALLENGE

Question the AI-assisted output where uncertainty, inconsistency or risk requires further scrutiny.

4 ESCALATE

Refer the AI-assisted output or its use to the appropriate governance authority for review or decision.

5 STOP

Prevent the AI-assisted output from being used because it presents unacceptable governance, legal, ethical or organisational risk.

PUT IT INTO PRACTICE

A project team has used AI to draft a benefits forecast for a major transformation programme.

Before the forecast is presented to the Steering Committee, the PMO asks:

What would your PMO want to know?

- ☐ Was the use of AI deliberate and approved?
- ☐ What data was used 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?

WHAT WOULD YOUR RESPONSE BE?

Based on the information available, which governance response would you choose?

☐ TRUST ☐ VERIFY ☐ CHALLENGE ☐ ESCALATE ☐ STOP

Why?

.....

.....

.....

BRING IT BACK TO YOUR PMO

Where is the biggest gap in our current approach to AI governance?

.....

.....

.....

What is one governance question we should start asking?

.....

.....

.....

What is one thing we should put in place or strengthen?

.....

.....

.....

ONE THING I WILL TAKE FORWARD

.....

AI GOVERNANCE IN PROJECTS

SESSION NOTES

Capture key insights as you listen.

Key Notes

WHO REMAINS ACCOUNTABLE WHEN AI CONTRIBUTES TO THE EVIDENCE OR RECOMMENDATION?

WHAT SHOULD BE VERIFIED, ASSURED OR CHALLENGED BEFORE ACTING?

WHAT BOUNDARY OR CONTROL WOULD YOU PUT AROUND AI USE FOR YOUR REPORTING?

AI GOVERNANCE IN PROJECTS: TEAM EXERCISE

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

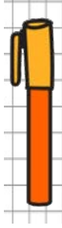
YOUR TASK

- 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.

THE GOVERNANCE RESPONSES

TRUST	Accept the AI-assisted output or AI use as fit for purpose under normal project governance.
VERIFY	Obtain additional evidence or validation before relying on the AI-assisted output or AI use.
CHALLENGE	Question the AI-assisted output or AI use where uncertainty, inconsistency or risk requires further scrutiny.
ESCALATE	Refer the AI-assisted output or AI use to the appropriate governance authority for review or decision.
STOP	Prevent the AI-assisted output or AI use from continuing where it presents unacceptable governance, legal, ethical or organisational risk.

We've given you all three scenarios here in the workbook, listen out to which scenario you and the team will be doing today.



TEAM EXERCISE

House of PMO Insight Conference Edinburgh 26

1 THE FORECAST THAT CHANGED COLOUR

A large system implementation is eight months into a twelve-month delivery. This month's steering pack contains an AI-assisted schedule forecast that moves the project from amber to green and recommends standing down an additional supplier team.

KEY EVIDENCE

- Forecast reviewed by the Project Manager (the usual planner has left).
- Based on the project schedule and workstream updates.
- Two workstream updates arrived after the forecast was run.
- The supplier's forecast is three weeks later (with a commercial interest in keeping the extra team).

OUR RESPONSE (tick one)

☐ Trust ☐ Verify ☐ Challenge
☐ Escalate ☐ Stop

KEY REASONING / QUESTIONS

2 THE REVISED APPROACH RECOMMENDATION

A programme has submitted a change request recommending a different delivery approach (Option B) at an additional cost of £28,000 to reduce the risk of a late go-live. The AI-generated options appraisal compares three options and recommends Option B.

KEY EVIDENCE

- The Sponsor read the two-page summary and supports the option.
- The Programme Manager read the detailed appraisal but did not check the workings.
- Finance confirmed the estimates for Options A and B. No estimate was available for Option C (the AI tool extrapolated one).
- An earlier draft recommended Option A (the recommendation changed after adding weighting criteria).

OUR RESPONSE (tick one)

☐ Trust ☐ Verify ☐ Challenge
☐ Escalate ☐ Stop

KEY REASONING / QUESTIONS

3 THE WARNING

The monthly highlight report includes an AI-generated risk analysis that flags a "high" probability of regulatory non-compliance within three months unless increased testing is approved now. The recommendation is to allocate additional budget and resources immediately.

KEY EVIDENCE

- Based on historical project data, regulatory updates and internal documentation.
- The Compliance Lead says the regulatory data is not current and questions the risk rating.
- The Project Manager believes the overall trend is credible and supports the action.
- The AI methodology and assumptions are not explained in the pack.

OUR RESPONSE (tick one)

☐ Trust ☐ Verify ☐ Challenge
☐ Escalate ☐ Stop

KEY REASONING / QUESTIONS

WHAT TO LOOK FOR

- MISSING EVIDENCE
- CONFLICTING SOURCES
- UNCLEAR OWNERSHIP
- UNCHECKED ASSUMPTIONS
- OUT-OF-DATE DATA
- HIGH-IMPACT DECISIONS

What would make you move from Verify → Challenge → Escalate → Stop?

DATA
INFORMATION
KNOWLEDGE
WISDOM
ACTION

DAY TWO - 2.55 - 3.20pm

AI GOVERNANCE IN PROJECTS: TEAM EXERCISE



What's on the App?

Remember to make sure the team upload their exercise to the app - just add your table number!

Scan Me

Find out more about the AI Project Governance Framework

TEAM EXERCISE



1 WHAT DID WE DISAGREE ABOUT?



2 WHAT SEEMS TO MAKE AI ASSURANCE DIFFICULT?



3 WHAT SHOULD A PMO STANDARDISE?



4 ONE PRINCIPLE OUR TABLE WOULD TAKE BACK TO THE PMO.

MY 90 DAY ACTION PLAN

REMINDER

CHECK OUT AIPGF

www.aipgf.pro

Who Needs to Know About the AI Project Governance Framework (AIPGF)?

Project Portfolio and Oversight Roles

Project Management Office (PMO) leaders, Enterprise PMO Leaders, Change Managers, Project Sponsors and Steering Committees/Boards:

→ You are accountable to the organisation's board for ensuring AI use in projects and programmes is ethical, efficient and effective. You should **champion AIPGF adoption**.

Project and Programme Delivery Roles

Programme and Project Managers, Project Coordinators and Project Core Team Members:

→ As users of AI tools in projects, you are responsible for ensuring the benefits of AI assistance are harnessed whilst the risks are managed. You need to uphold the Principles of human-centricity, transparency and adaptability and should **know how to practically integrate the AIPGF's guidance in your project processes**.

Governance, Risk and Compliance Roles

Chief AI Officers, Digital Transformation Leaders, AI Ethics Advisors, Internal and External Auditors, Legal, Compliance and Regulatory roles:

→ As guardians of organisational integrity, **your role is to ensure that AI use in projects aligns with external standards and internal policy**. The AIPGF helps translate general AI standards and regulations into project-specific governance, ensuring AI risks are managed and accountability is clear.

AI PGF

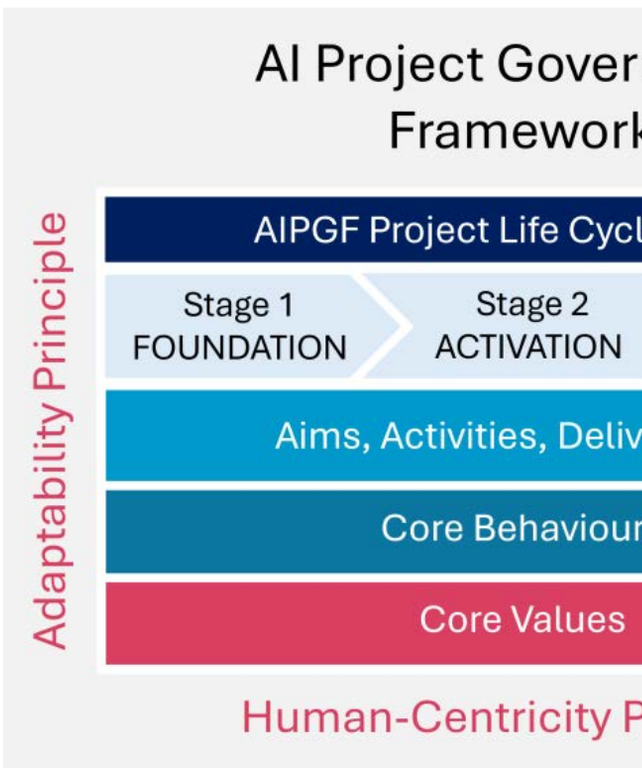
How mature is the governance of AI use in YOUR projects and programmes?

Complete a free AI Governance Maturity self-assessment at https://aipgf.pro

AI PROJECT GOVERNANCE FRAMEWORK
AIPGF
FOUNDATION
APMG International

THE AI PROJECT GOVERNANCE FRAMEWORK
AIPGF





TIME FOR TEA!


WHAT DID I LEARN OVER COFFEE?
WHO DID I SPEAK TO?
Name:
Organisation:
Topic:
Contact details:
Name:
Organisation:
Topic:
Contact details:
Name:
Organisation:
Topic:
Contact details:
IDEAS TO EXPLORE
PMO CHALLENGE OR TOPIC DISCUSSED
USEFUL FOLLOW-UP
ONE THING I WANT TO REMEMBER

DAY TWO - 3.50 - 4.35pm

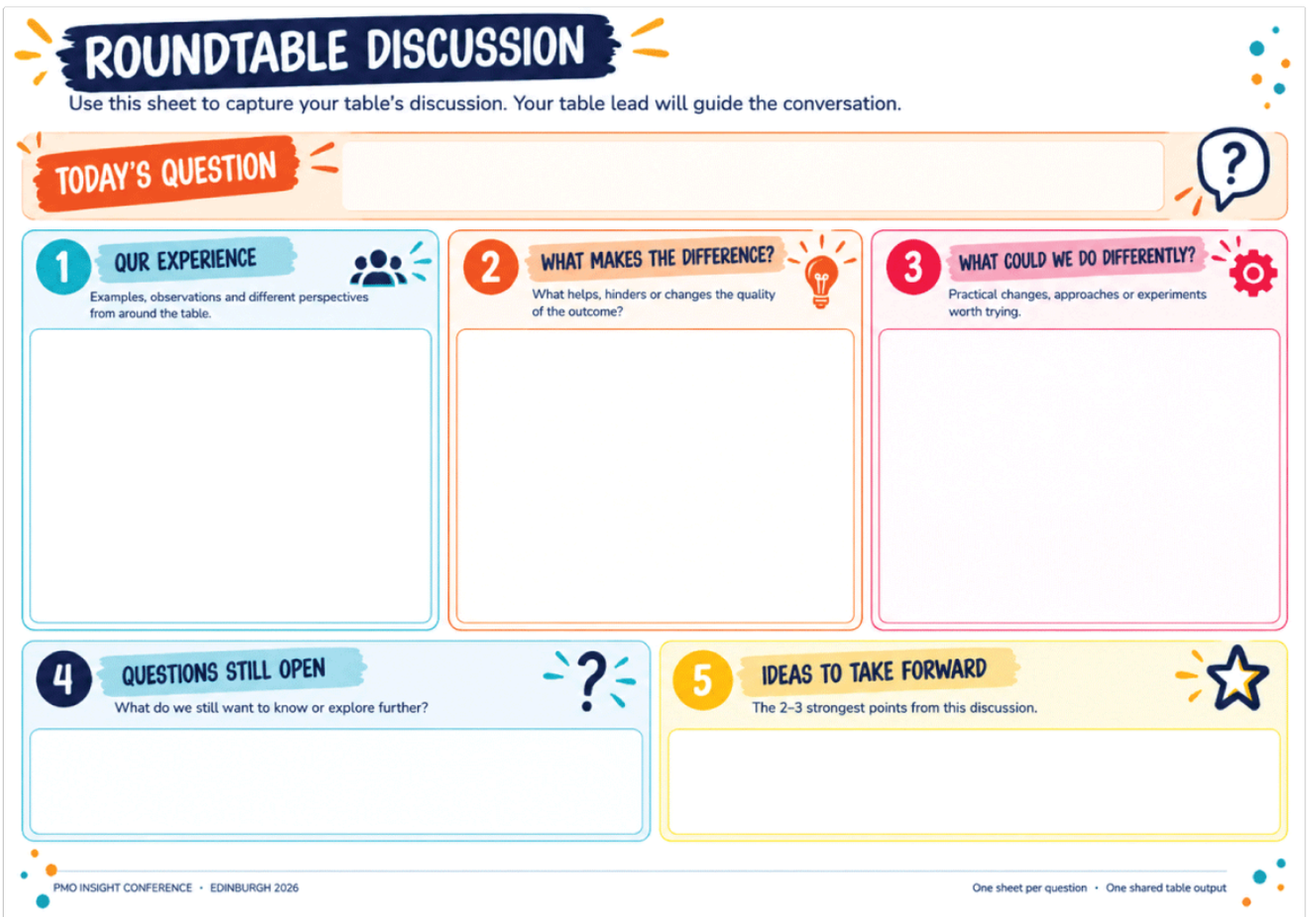
ROUNDTABLE DISCUSSIONS

Earlier your team picked two questions for the roundtable discussions. These discussions are loosely facilitated and there are a few little table rules.

1. Everyone speaks once before anyone speaks twice

2. Your experiences - say "I" or "we" not "people" or "the organisation"

Here's the template we'll be using for the discussion







ROUNDTABLE DISCUSSIONS

You can use this space for capturing anything you don't want to lose on the table!



ROUNDTABLE DISCUSSIONS MY NOTES

Use this page to capture your notes and key takeaways from the two roundtable questions your table has chosen.

1 OUR CHOSEN QUESTION

KEY POINTS FROM OUR DISCUSSION

2 OUR CHOSEN QUESTION

KEY POINTS FROM OUR DISCUSSION

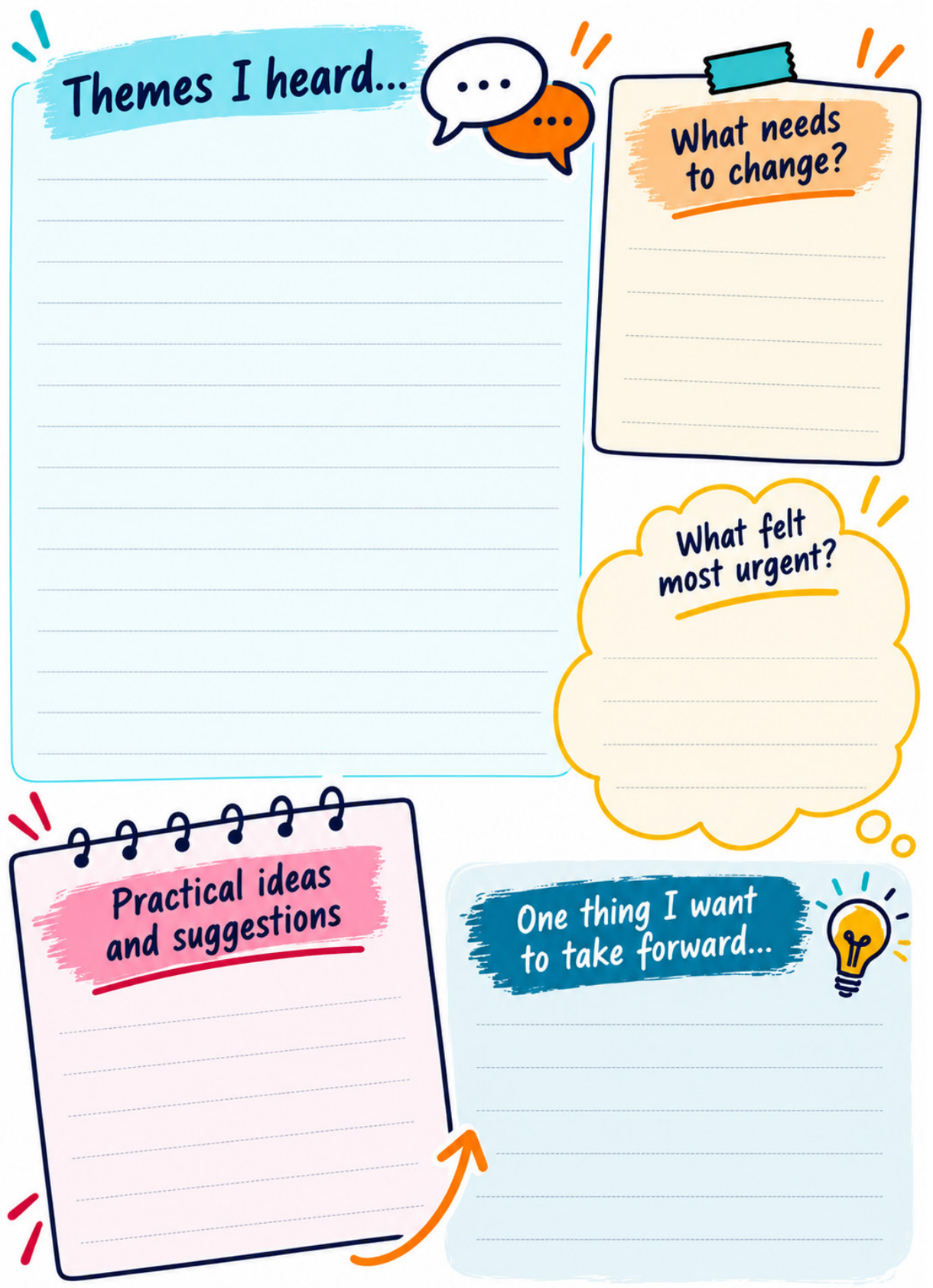
MY TAKEAWAYS

What are the main insights, ideas or actions I want to take away from these discussions?

DAY TWO - 4.35 - 5.05pm

WHAT NEEDS TO CHANGE?

We hear from the tables - not a lengthy report just the bits that really stand out that EVERYONE in the room needs to hear



MY NEXT 90 DAYS: PMO INSIGHT ACTION PLAN

We're coming to the end of the PMO Insight Conference and you'll be wanting to start the journey home - no doubt exhausted from the last two days.



Before you leave today the next step is turning the learning into something practical.

There is no single right format for doing this - what matters is choosing an approach that helps you move from "that was interesting" to "this is what I'm going to do next."

There are lots of ways to do that. You might prefer a 30–60–90 day plan, a simple roadmap, a short list of priorities, a set of commitments, or even one clear action to start with.

The examples below show a few different ways you could structure your thinking:



Before we dive in, let's have a look at what we've learnt over the 2 days - and why the workbook really starts to help us make a practical action plan.

MY NEXT 90 DAYS

HARVEST YOUR WORKBOOK

FROM NOTES TO PRIORITIES



Over the last two days you've captured lots of ideas, experiences, examples and questions. Now it's time to bring them together and decide what to focus on.

1 LOOK BACK

Flick back through your workbook and look for:

- Things you starred, circled or underlined
- "One thing I want to remember"
- "One thing I may need to change"
- Follow-ups and unanswered questions
- Ideas and examples that resonated
- Anything already written in the 90-day boxes

2 PULL IT TOGETHER

Capture and organise what you've learned.

IDEAS I WANT TO KEEP
What still feels important now?

PROBLEMS OR GAPS I WANT TO ADDRESS
What kept recurring across the two days?

THINGS I WANT TO TRY
A process, behaviour, tool, question or approach.

PEOPLE I NEED TO INVOLVE
Who do I need to talk to, influence or work with?

THINGS I NEED TO FEIND OUT FIRST
What still needs evidence, permission, clarification or investigation?

3 PRIORITISE

Choose three of the strongest candidates for action.

MY THREE STRONGEST CANDIDATES FOR ACTION	Will this make a meaningful difference?	Is this within my influence?	Can I make progress within 90 days?
1	☐	☐	☐
2	☐	☐	☐
3	☐	☐	☐

4 MY FOCUS

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

MY NEXT 90 DAYS

House of PMO Insight Conference Edinburgh 26

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?

DATA
INFORMATION
KNOWLEDGE
WISDOM
ACTION

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

Turning our reporting into real-time insights for decision-makers.

NEXT 30 DAYS – START

Get started and build momentum.

KEY ACTIONS

- Review conference notes and identify 2–3 key ideas
- Start a conversation with my leadership team about the opportunity
- Define success criteria for this initiative

SUPPORT I NEED

- Head of PMO
- Data Analytics Team
- External insight from our partner

POTENTIAL BARRIERS

- Competing priorities
- Limited resource
- Unclear decision owner

SUCCESS LOOKS LIKE...

- A clear plan agreed
- Buy-in from key stakeholders
- Actions captured in our PMO plan

DAYS 31–60 – BUILD

Develop, test and make progress.

KEY ACTIONS

- Run a pilot of the new reporting approach
- Share early findings and gather feedback
- Refine the approach based on insights

SUPPORT I NEED

- IT & Data Team
- Business Stakeholders
- PMO Community

POTENTIAL BARRIERS

- Data access issues
- Change fatigue
- Lack of time

SUCCESS LOOKS LIKE...

- Positive feedback from users
- Clear evidence of value
- Plan ready for wider rollout

DAYS 61–90 – EMBED

Embed, refine and deliver impact.

KEY ACTIONS

- Roll out the approach across the PMO
- Measure impact against goals
- Share learnings and next steps

SUPPORT I NEED

- Ongoing leadership support
- Access to relevant tools
- Communications support

POTENTIAL BARRIERS

- Shifting priorities
- Resource constraints
- Scope creep

SUCCESS LOOKS LIKE...

- Adoption of the new approach
- Measurable improvement
- Plan for continuous improvement

HOW I WILL KNOW IT'S WORKING

By seeing greater use of insight in decision-making, positive feedback from stakeholders and measurable improvements in outcomes.

- Insight influencing key decisions
- Increased confidence in our data
- A more proactive PMO

FURTHER RESOURCES

Keep the learning going

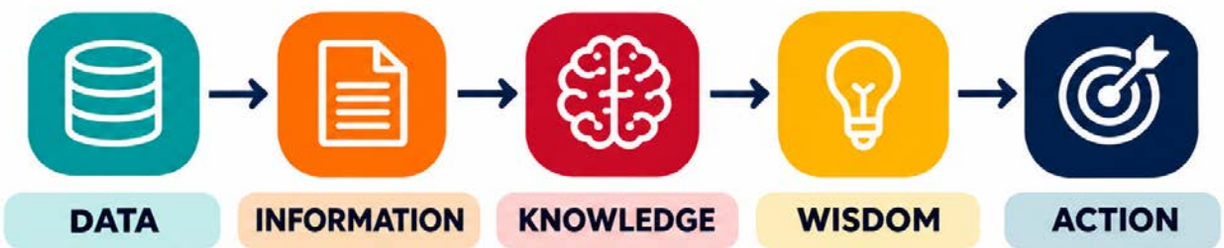
Scan the QR code to access the conference resource page, where you'll find the presentations, the workbook and any extra resources from PMO Insight Conference.

https://houseofpmo.com/pmo-conference/edinburgh/insight-downloads/

THE CONFERENCE ENDS. THE THINKING DOESN'T.

Your workbook doesn't have to end here.

Revisit your notes, actions and questions after the conference – and use the resource page for slides, follow-up material and anything we add afterwards.



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