

Embracing Practicality in Program Management

BY KRISTINE JORDAN

Do you wonder if your Program Management Office (PMO) is aligned with the program's strategic objective? Do you ever feel as though a program's processes are complicated? Do you sometimes question the value a PMO provides?

It is healthy to ask these questions. Creating a practical PMO may be the answer. Remember the old adage, "less is more?" Sometimes less really can be more effective and valuable. The key is not to over-architect the PMO. Keep it simple.

To establish a practical PMO, one must first consider the purpose of a PMO in the context of the specific situation. The "ideal" PMO is almost never a cookie-cutter set of functions and processes. The structure and function of an "ideal" PMO must suit its environment factoring in the organization's culture, experience of stakeholders, and methodologies being utilized. The key is to understand the need, purpose, and objective before opening a generic PMO structure and trying to apply it to the environment. Each PMO structure can achieve a different objective.

A PMO CAN SPAN A VARIETY OF FUNCTIONS, INCLUDING:

- Financial Management
- Release Management
- Stakeholder Management
- Demand Management
- Scope Management
- Vendor Management
- Risk and Issue Management
- Process and Methodology Management
- Time Management
- Communications Management
- Quality Management
- Governance and Leadership

PLAN
PRACTICALLY

MANAGE
PRACTICALLY



It is rare that a PMO will need to establish all of these functions simultaneously. It is more common to establish the highest priority functions initially, then fold in additional functions as necessary. Define a PMO roadmap to outline when capabilities and functions will become relevant. As the organization matures and priorities shift, the PMO will progress within the roadmap.

Regardless of position within a PMO roadmap, there is one common objective that all PMO structures, functions, and processes should embody: practicality. The most important factor is to ensure the PMO is adding value in a practical manner. The value of operating under a practical PMO is recognized when program members mitigate risks before becoming issues. To enable such an environment an organization must both “Plan Practically” and “Manage Practically.”

PLAN PRACTICALLY

Once a clear vision of the PMO’s purpose and success criteria is defined, the PMO team can use this as a guide to prioritize efforts to establish processes and perform activities in alignment with the vision and PMO roadmap. Avoid becoming distracted early on

with ancillary processes which can be tackled at a later date. How do you know if a PMO has been planned practically? Consider the following examples:

“What value is brought to the table?”

Most PMOs will establish a RACI Model (Responsible, Accountable, Consult, Inform), which should be used throughout the project. For example, a RACI matrix can be leveraged to guide the feedback gathering process. We’ve all heard the saying, “Two heads are better than one.” Having more than one set of eyes on deliverables will enhance the quality. At what point do we have too many eyes on an effort or deliverable? Is it six people? Eight people? There isn’t one correct answer. One must apply their “practical filter” once again. Take an analysis deliverable in a common technology project as an example. Does it make sense to have eight test representatives review the documentation and provide feedback? Probably not. What about one to two testers and/or a test lead? The program must weigh the benefits against the cost of eight people to avoid diminishing returns. Each deliverable/activity should assess the additional value-add each owner provides and ensure this is reflected in the RACI as part of the plan.



“Too much to do in too little time.”

Once a RACI Model is created and a PMO roadmap is established, teams can estimate the appropriate number of resources to engage and the corresponding skillset required, thereby creating a team whose workload is balanced. If the opposite condition is followed where a PMO is staffed before its roles and responsibilities are understood, the cart may be before the horse. The end result may be over-worked resources. By understanding expectations, the team can take a practical approach to ensure coverage for work activities.

“Why am I paying for that person to attend meetings instead of participate in them?”

The PMO should leverage the RACI Model throughout the project. Ensure that the activity or deliverable has a diverse set of reviewers/participants without using a deliverable/activity as a “ramp up” period. This is inefficient and impractical from a cost perspective. Why have two people do one job if there is no additional value added with each attendee/reviewer? The end result would be redundancy. Engage a resource at the appropriate time according to the agreed upon (and estimated against) RACI Model.

“How am I supposed to do this task? Where do I find that document?”

The PMO may need to establish processes for functions that need to be supported should an enterprise-wide standard or other set of processes not already be instituted. A process may not be practical if it requires more time to perform than to handle the topic itself. The process may be over-architected. Keep it simple. For example, when determining which tools to use to support processes, the team should consider the user experience.

- **“Where is that item logged?”** Risks, Action Items, Issues, and Decision (RAID) logs are commonly and very easily managed in SharePoint. If there are multiple work streams, the program can still use one RAID log by leveraging a couple extra fields

for work stream categorization and ownership. As a result, if an action item needs to transfer to another work stream, changing one field is more efficient and cost effective than fully copying/pasting into another log. It’s easier for the users to locate as well.

- **“How do I do that again?”** Ensure that the tool selected doesn’t require significant training. Take meeting management for example. Most people manage their schedules through Outlook on a daily basis and even have integration with their mobile phone. As such, Outlook tends to be considered the most practical approach for meeting management. Trying to leverage another tool for managing meetings may add unnecessary complexity as users may be unfamiliar with the additional application.
- **“Which of the conflicting meetings should I attend?”** Consider the option of having one resource own calendar coordination and scheduling of all meetings. It may not be fun, but it may be the most practical approach to avoiding conflicts and over-complicating a process that results in higher costs as well.

“This document takes forever to update. It’s such a pain.”

Documents and deliverables are used for various purposes. Those that must be kept current should be easily used and maintained. Consider combining deliverables where possible. For example, a RACI model, roles and responsibilities, project contacts, stakeholders, and/or resource management plans could all be stored and maintained in one document. This may prove to be the most practical means of maintaining all this information without requiring multiple documents to be updated with each program change. On the other side there are deliverables that are more difficult to produce. Practically speaking, these should be deliverables presented on a periodic rather than routine basis.

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“We’re reinventing the wheel. I spend all my time communicating. I didn’t hear the same thing.”

Effective communication must include the appropriate level of information for the respective audience at the appropriate time. Oftentimes, the PMO is responsible for a portion of communications and therefore should develop and execute against a Communication Plan. In developing the plan, think through efficiencies that can be recognized by leveraging the same message where possible. Crafting communications can be very time intensive. Minimizing the amount of customization where possible may make the approach more practical, but be careful not to sacrifice the quality or effectiveness of the message.

A practical tip to keep in mind: if the message or activity may need to be repeated for multiple groups, consider recording it and storing in an easily accessible location. It will save the program time and money while ensuring stakeholder needs are fulfilled.

“Why weren’t we informed of that decision?”

Whether a PMO is targeted for enterprise, organization, or program coverage, the PMO must have sufficient understanding of scope in order to manage effectively. Consider a multi-release situation when a decision is made as part of the first release. The PMO should have an understanding of the impacts to know if it’s practical to engage Release 2 resources to explore potential impacts. Does that mean that the PMO needs to review all deliverables? No. There is a practical approach to understanding sufficient level of scope detail, organization dynamics, responsibilities, and touch-points to help determine when to engage another organization to assess impacts. Engaging multiple teams too often is costly and therefore impractical. Having the right level of understanding of scope will help the PMO know when to prompt the question regarding impacts to other groups, releases, and organizations.





“Why am I working on this when nobody will use it?”

All programs are not created equal. As such, the deliverables that are required to achieve the program’s objective will vary. Let’s look at two different options: scenario A - large transformational effort estimated to cost \$20M+ and scenario B - point release to occur between two large integrated releases that will make isolated modifications to an existing environment. A PMO would have the breadth of knowledge to determine whether a full project charter is required. A very detailed project charter would be required for scenario A to understand all the moving parts. However, in scenario B the effort is rather narrow in focus. A project charter would touch on the key points and move to the next critical deliverable, not just the ones that a PMO owns, but all deliverables. Each deliverable should be evaluated for the overall value-add to the program and a decision made accordingly as to whether each is truly necessary.

MANAGE PRACTICALLY

If a PMO is planned practically, it is easier to manage practically, though some modifications may be necessary to evolve over time. Should a program already be in-flight, it may be worthwhile to take a step back, evaluate the current state, and make adjustments as necessary.

Keeping a focus on practicality is important once a PMO is established. If program priorities or an objective changes, the PMO must recognize this change and course-correct accordingly.

“We need to meet more often so I have a pulse on project activities.”

As part of the stakeholder management plan, each group should be receiving the appropriate messaging and be engaged at the appropriate time via a practical vehicle. Keep in mind that the amount of management for a set of stakeholders should correlate to the degree of impact on the success of the project. Low-impacted stakeholders should typically receive a lesser degree of support, communications, and engagement than a highly impacted stakeholder. Another consideration is the degree of political persuasion a set of stakeholders may have. Supporting a highly persuasive yet low impacted group in an enhanced manner may be practical, as the odds of success are likely to increase. Evaluate the impact and value of meetings and volume of engagement against the benefit gained in order to find the most practical stakeholder management solutions.

“Is anyone listening to me?”

Stakeholder management is also a two-way street. Periodically, the PMO may need to solicit feedback from stakeholders and project members as feedback can be very valuable. How should a PMO gather feedback? How often? The timing and process by which feedback is gathered must be practical and easy. Consider surveys. The program must be able to gain insight into the stakeholders’ perspectives without the survey taking an extensive amount of time to complete or to analyze. Again, we must apply practicality to achieve the goal.



“Why is this the first I’m hearing of this?
This is not what I expected.”

As a program progresses, the PMO must continue to manage expectations. There’s a saying, “Dissatisfaction is when reality does not meet expectations.” Once initially set, the PMO must measure and tailor expectations of stakeholders accordingly. An example of stakeholder misalignment would be if Jane, the business requestor driving a business change, expects results by Q3, but the work plan predicts results to be recognized in Q4 due to external dependencies. Be forthright with Jane. Acknowledge that her desire is Q3 and perform the required analysis to identify the practical timeframe for benefit realization. Committing to an impractical expectation and not managing expectations to the plan sets the program up for failure. Be practical by evaluating the facts and managing expectations accordingly. It is also unrealistic to assume that everyone knows and understands why Q3 is not a realistic expectation. Set and manage expectations.

“Because that’s the way we’ve always
done it ...”

We all wish we had a crystal ball to look into the future. It is unrealistic to assume a PMO can predict when and where all bumps may surface as a program progresses. An effective PMO will continue to evaluate functions and processes, gather feedback from teams, and make adjustments accordingly to ensure the approach is still practical and providing value. Be open-minded and apply your “practical filter.” For example, if a status report format is continually changing week-to-week, it’s difficult for people providing input to stay current and causes frustration within the teams. Make changes where

necessary, but don’t expect to be perfect. Some processes may not work well or may take too long. The key is to continue to evaluate and adjust when it makes sense to do so.

SUMMARY

A PMO often has responsibilities across teams, work streams, and projects. It is healthy to continually assess processes performed and functions supported by the PMO to ensure they’re practical so the PMO can continually add value to a program. Do not allow your PMO to get caught in the downward spiral of spending multiple hours a day producing weekly reports that people only review quarterly, if at all. Recognizing symptoms of an impractical situation can be difficult. When recognized and adjusted, the value-add can be quite impactful. The PMO can enable a greater value-add by embracing practicality and course-correcting when necessary. In the end, the PMO will become an effective, high-performing, value-adding team.

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