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The First 90 Days of PMO Leadership
by Connie Inman & Marylyn Elle Houston
Second Edition

The First 90 Days of PMO Leadership[1]

You've gotten the title and responsibility, now what?

Connie Inman and Marylyn Elle Houston

ABSTRACT

You have been working your way up on the team and now you have been given the opportunity to lead the Project Management Office. There are multiple thoughts, best practice references, and theories on how to best setup, staff, and deliver Project Management Office Services. But, how do you as the new leader take on an existing PMO and what are the 10 things you can do to make sure your first 90 days are not your last with the company. What if you do not have a staff, or worse, the wrong staff? Often the PMO becomes the 'dumping ground' of the business – a place to park underperforming employees that are not quite bad enough to terminate but not good enough for any real responsibility. This paper will walk you through your first 90 days on the job. Topics include how to evaluate the team, the processes, the tools, and identify short-term initiatives that will make the most positive impact on the organization. We will also cover how to breathe life back into an undervalued PMO through in-place process improvements and establish performance metrics to communicate the value added by having YOU leading this Project Management Office. We will look at the top 10 activities you should begin planning now for improvement quick wins and leadership ability recognition.

INTRODUCTION

This paper will walk through the first 90 days on the job as a PMO Leader. Topics include how to evaluate the team, the processes, the tools, and identify short-term initiatives that will make the most positive impact on the organization. We will also cover how to breathe life back into an undervalued PMO through in-place process improvements and establish performance metrics to communicate the value added by having YOU leading this Project Management Office. We will look at the top 10 activities you should begin planning now for improvement, quick wins and leadership ability recognition.

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[1] *Second Editions are previously published papers that have continued relevance in today's project management world, or which were originally published in conference proceedings or in a language other than English. Original publication acknowledged; authors retain copyright. This paper was originally presented at the 9th Annual University of Texas at Dallas Project Management Symposium in August 2015. It is republished here with the permission of the authors and conference organizers.*

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GETTING STARTED

You have been working your way up in the company and now you have been given the opportunity to lead the Project Management Office. There are multiple thoughts you may have, and as well intended or accurate as those thoughts may be, there is one element that determines the outcome with you in place – YOU. Jack Canfield offers a theory of E+R=O wherein E is the event (what is happening). The R is for your response or reaction to the event. The O is for outcome (the resulting situation). The event is the constant and the only way to change the outcome is to change the variable of your response or reaction.

The role of leader is on your shoulders and the success of the department is dependent on your positive response to the event of building a PMO. However, how do you as the new leader take on an existing PMO and what are the 10 things you can do to make sure your first 90 days are not your last with the company. What if you do not have a staff, or worse, the wrong staff? Often the PMO becomes the 'dumping ground' of the business – a place to park underperforming employees that are not quite bad enough to terminate but not good enough for any real responsibility either.

In the section we will begin by evaluating the current situation, then identifying the initiatives, and building the plan for the department and your path to PMO leadership success.

START EVALUATING

The evaluation period should begin immediately and continue beyond the first 90 days. Begin by taking stock in the current environment and then evaluate the overall health of what is in place today. This is an effort of inventory – not sorting, scoring, or prioritizing.

TAKING STOCK

1. Roles & Responsibilities – what is the current functional responsibility of each individual in the PMO, what do they believe to be their job responsibilities, what does their job description state that they were expected to do coming into their position
2. Tools & Processes – what is documented, what is shared by shadowing someone versus formal training, what is each tool used for by each person using the tools
3. Policies & Governance Metrics – how is the PMO measuring success today – of the resources, of the responsibilities, and of the services
4. Fit within the organization – what is the relationship network diagram look like for how the PMO interacts with other departments within the organization
5. Perceptions & Expectations – what do the other departments (upstream and downstream) think of the current services of the PMO – this can be face to face and survey tool – face to face is critical for those needed for support of any future changes

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EVALUATE THE HEALTH

Communication is critical in any project and the implementation of new processes is not unlike a change management project. The following areas are keys to completing the health check. This is the step where you can add your thoughts into the process.

1. Employee Performance – how have the current employees been rated in the past, self-ratings, 360's, performance appraisals – are there any development plans – how do they fit within the culture of the organization – how do they appear to work within the group and what are their customer services capabilities
2. Tools & Processes Strength & Impact – are the tools being used to the fullest, are the tools the most current version on the market, what is the reliability of the tools, are they used by some and not by all – are the processes being followed to audit standards levels, what is the consequence of any one of the processes or tools not being used correctly – what is the impact of a process either being skipped or done incorrectly
3. Policy Effectiveness – what is the quality of the policy as is, approved by the right levels, reviewed regularly, policy development policy followed, enforcement criteria
4. Authority of the PMO – what is the 'voice' of the PMO and what level is available for escalation of issues?
5. Reputation and relationship gaps – highlight red for those that have high influence and impact and are not onboard, yellow for those that influence but no immediate impact and not on board, blue for those that are solid and are available to assist, and then green for all others.

IDENTIFY INITIATIVES

The identification period should be an iterative process throughout the evaluation period. Begin identifying initiatives only when enough current state information has been discovered. This is an effort of brainstorming options, mapping the vision, and developing the plan of moving from Vision to Action. Be considerate of the change management effort that you are planning to introduce to the team and the organization. Too much of a good thing is still too much.

DEFINE FUTURE STATE VISION

The definition period includes aligning to the business goals, the executive needs, building the PMO mission and mapping a career path for the roles needed within the PMO. Brainstorm all the options to begin addressing the key stakeholder areas of feedback.

MAP THE VISION

Develop a Roadmap with categories of People, Processes, Tools, and Commitments. Create a State of the PMO document that outlines your observations of the current state, your plan for the immediate needs, and your vision for the next 18 months. What should the roles be within the

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PMO? How will you move the current staff from what they do to what they should be doing? Which processes are the most critical for improvement? How will you communicate and train on the process changes? Should you purchase new tools, upgrade the existing or just replace them?

First, enter routine recurring commitments on the roadmap. Then begin inserting the activities to complete the vision as defined. What is the communication plan going to be in order to get the right message out about the changes?

MOVING FROM VISION TO ACTION

Once the roadmap is complete and the communication plan defined, it is time to prioritize targeted first-year initiatives. Put together an update deck for the business units the PMO supports and personally visit them to share who you are, what you want to accomplish, and how they can help get the PMO and the company to the next evolution of PMO services. Remember to define what is in it from them – their reason for buy-in.

BUILD THE PLAN

With the evaluation completed, the initiatives identified and the roadmap developed, it is now time to move into building the plan. Building the plan includes prioritizing the initiatives, finalizing the roadmap, and viewing the PMO as a project into itself.

PRIORITIZE THE INITIATIVES

Map the initiatives into three categories: Organizational (outward facing initiatives necessary for the day-to-day operation of the PMO); foundational (initiatives that are the support for the PMO services – the core foundation of the PMO); and strategic (initiatives that would make lives easier but are not critical for now).

Within each category, rank the initiatives with the following coding: Code Blue, Red Alert, Yellow Horizons, Go Green, and White Lights. Code Blue for those initiatives that require regular resuscitations. Red Alerts for those initiatives that are near death and have a high impact upon failure. Yellow Horizons are for those initiatives that are troublesome but have a lower impact upon failure. Go Green for the initiatives that seem to be satisfactory – do not take your eye off them though. In addition, White Lights for those visions for future planning initiatives.

The key to each of the prioritizations is to know what the trigger points are, what will move them from one color to the next (up or down) and what the warning signs are. What is good enough? This criteria needs definition in order to determine how much effort to spend on each initiative and resources required.

FINALIZE THE ROADMAP

Update the roadmap to identify recurring commitments, the quick wins, the current year initiatives, and the functional organization and resource management plan. This roadmap is the key to communicating your plan, status, and vision to your key stakeholders. Vet the roadmap with your team – make sure they understand the scope and importance of each entry and that they support the plan when you are not in the room.

PMO AS A PROJECT

The final part of building the plan is to remember that the PMO Optimization is a project. Build out the durations, dates, and dependencies of all the initiatives. Build a risk management plan for the initiatives on your roadmap, and define your PMO communication plan. Do not wait for others to come to you to find out what is going on – if they have to ask it means your current communication plan is not working. In addition, always remember to obtain sponsor approval of the plan.

RUNNING IN PLACE

Plan the work and work the plan. However, do not allow your plan to become shelf-ware. Develop a process improvement approach, market your efforts, and measure what matters. As you gain momentum, delivering on each initiative, there will be more initiatives to add to the plan. Follow the same path of categorizing/prioritizing and then add them to the plan.

PROCESS IMPROVEMENT

Take each category prioritization and identify what you will do for each, add the activities and assignments to your plan, and track progress on each. Know the critical path for each initiative and what the scope of 'now' versus 'later' includes. Monitor all of the initiatives and do not ignore the Go Green or the White Lights. Keep moving all to the center of Go Green.

MARKETING YOUR EFFORTS

When you develop your marketing strategy for the PMO Optimization, first determine the message, the audience, and the medium for communicating. The message should be a positive statement of vision without over-reaching. Develop a different message for each audience – one size does not fit all. Make sure your team buys into the message and becomes living proof of the plan. If they do not support it others will not either.

Next, develop a marketing plan by identifying all of the communication activities and avenues. Align the events to the PMO roadmap, keeping the PMO team focus. Be aware not to plan an all-employee marketing communication just before or during a major go-live on one of the critical

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initiatives. Set a budget for marketing goodies – pens, shirts, etc. things that will sell your brand within the organization. As with everything else you are doing – make sure you have sponsor approval. If you do not tell them what you and your team are doing, how will they know? You will never receive praise or directional critique on something your sponsors do not know about. It is the little things you do that build momentum, successful delivery of change will ensure continued support.

MEASURE WHAT MATTERS

Determine what you will measure to track PMO effectiveness; focus on base lining before going for governance compliance. Capture metrics that tell the story of the PMO from what it was to what it is becoming. Note what progress has been made, and why that matters. Celebrate the milestones. Do not overdo it but do ensure the right level of recognition given to continue building commitment and motivation of the team, stakeholders, and sponsors. A few metrics include performance of financials, audit compliance, resource utilization, and customer satisfaction rating through survey and interview.

PMO LEADERSHIP TOP 10

The following are the top 10 driving philosophies I find most helpful in keeping the right focus when the stress levels get highest.

1. People don't care how much you know until they know how much you care (Zigglar)
2. Those that fail to learn from history are doomed to repeat it (Churchill)
3. It is not enough to do your best; you must know what to do, and then do your best (Deming)
4. If the plan doesn't work change the plan not the goal (Unknown)
5. Don't find fault, find a remedy (Ford)
6. Arrogance is the camouflage of insecurity (Fargo)
7. Practice the philosophy of continuous improvement – get a little bit better every single day (Unknown)
8. The most important thing in communication is to hear what is being said (Drucker)
9. Plan do check act (Six Sigma)
10. If you give a mouse a cookie (Numeroff)

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CONCLUSION

The first 90 days of PMO leadership are exciting, stressful, and if done correctly, very rewarding. Servant leadership is the key – focus on what is in it for others. Others will reward and recognize you as a leader to follow. The approach in this paper includes evaluating, planning, executing, and continually improving the optimization of the PMO. The plans developed in the first 90 days are just the foundation of what has yet to come. The plan lives on to help the PMO be what best serves the company as it grows. Communication is key to ensuring your first days are not your last. Once you identify and evaluate the current state of the PMO, develop a plan for the quick wins, and execute a well-focused and measured marketing effort with clear communication plans, you will have established a great foundation for a soon to be outstanding PMO.

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