

Series on Project Business Management and the PMO¹

Establishing Vision, Mission, and Policies for Organizational Project Business Management (OPBM) and the Enterprise-Level Project Business Management Organization (PBMO) – Executive Overview

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Introduction

Executives should view organizational project management as a specific business management construct or concept just like Financial Management, Accounting Management, Information Technology Management, Production Management, Engineering Management, or Operations Management—each of which report to the enterprise’s executive level and provide specific business or technical services and support, on an enterprise-wide basis. That is why we use our term of *Organizational Project Business Management (OPBM)* to emphasize the business aspects represented by the concept of organizational project management. Organizational Project Business Management, as with Accounting Management, requires a functional organization to provide, implement, and maintain the necessary and associated infrastructure within the enterprise. For OPBM, that functional organization is the Project Business Management Organization (PBMO) operating at the senior executive-level. A chief project officer, who reports directly to the chief executive officer, leads the PBMO and is responsible for implementing and managing Project Business Management on an enterprise-wide basis.

For OPBM to be inculcated across the enterprise, the enterprise’s long-term business vision and mission for Organizational Project Business Management must be explicitly defined, cover the implementation and use of the Project Business Management Organization, and be formally issued and mandated by executive management.

Need for Visions, Missions, and Policies

Executives and senior managers need to care about establishing formal institutionalized vision, mission, and policy statements for all of the enterprise’s operational business management functional organizations, that are required to implement and manage those business management functions enterprise-wide, including Organizational Project Business Management, and its Project Business Management Organization.

¹ *Editor’s note: Bolles and Hubbard are the authors of The Power of Enterprise PMOs and Enterprise-Wide Project Management (PBMconcepts, 2014); A Compendium of PMO Case Studies – Volume I: Reflecting Project Business Management Concepts (PBMconcepts, 2012); and A Compendium of PMO Case Studies – Volume II: Reflecting Project Business Management Concepts (PBMconcepts, 2016). This series of articles is based on their books, research, courses, and executive consulting experience.*

Why? Because, a properly integrated set of vision, mission, and policy statements accommodates the numerous business and management factors driving the enterprise's project-portfolios, project-programs, and projects, improves organizational communication, reduces procedural deficiencies, minimizes lost time, and optimizes resource distribution and application. Formally stated visions, missions, and policies enhance the psychological and occupational work environment and improve the physical business environment in which we all live and work. In today's competitive, litigious, and project environments, a structured, communicated, and concise set of current visions, missions, policies, and the supporting system of methodologies, processes, procedures, and practices is a simple and effective means of establishing and maintaining prudent project/program/portfolio business management. It is a proven means of helping sustain profitability and delivering value and benefits. It is also the first and best defense against un-welcomed litigation.

Formalized visions, missions, and policies must exist to support the enterprise's development of the methodologies and processes and are required to generate the formal implementing procedures and practices. These documents support the enterprise's staff so they can repeatedly make the same types of prudent business decisions while routinely and successfully performing the same kinds of tasks. Visions, missions, policies, and procedures establish a large portion of the business environment in which operational and project/program/portfolio personnel work, and they are an important determinant role in instituting organizational effectiveness. They direct or influence how personnel resources perform work and how other types of resources are used effectively and efficiently. From a human and organizational effectiveness standpoint, those policies and procedures also determine how personnel reach decisions; how personnel perform when doing their work; and how the enterprise reacts to the performance of portfolio, program, and project personnel.

An enterprise's set of vision, mission, and policy statements are also indicative of an enterprise's value system—its beliefs about employee behavior, its concepts of community, and its professional responsibility. What an enterprise espouses will establish how the enterprise is perceived by its employees, customers, suppliers, regulators, shareholders, stakeholders, and community.

Therefore, enterprises must ensure their OPBM and PBMO vision, mission, and policy statements are consistent with the enterprise's overall vision, mission, values, culture, beliefs, and long-term business strategies and business objectives.

Enterprises operating without a comprehensive integrated written set of visions, missions, and policies are at risk both operationally and financially, and they do not obtain the highest performance from the enterprise's limited resources. Uncontrolled repairs, reworks, re-coding, re-testing, lost time, inefficiency, and lawsuits are costs that directly impact the enterprise's bottom line. In addition, process problems, dysfunctional management interactions, and unmanaged organizational interfaces, over a period of time, can negatively impact operations, profitability, and the value and benefits obtainable from managing projects, programs, and portfolios.

As an enterprise understands more about the types of competition it faces, the impact of industry and practice standards, regulatory requirements, and how to remain profitable, the enterprise's executives must thoughtfully examine and revise the enterprise's OPBM and PBMO vision, mission, and policy statements.

A review of the literature, management assessments, and PMO case studies shows if focused vision, mission, and policy statements, and the implementing methodologies, processes, procedures, and practices are available, then errors and issues are minimized leading to reduced costs and increased profits. In addition, the effectiveness and performance efficiency of both project and operations personnel are measurably improved.

Positive Procedural System Traits

A review of the literature, management assessments, and PMO case studies also shows the following traits have fostered developing integrated, focused, and cost-effective systems of methodologies, processes, procedures, and practices, for the more successful Project Business Management implementations and business management operations.

- Top management did not directly blame the various lower-level line managers, personnel, or a myriad of management process symptoms for the enterprise's technical, operational, or project management process problems.
- Most line managers viewed the defined project/program/portfolio management methods, processes, and procedures as real management tools and willingly provided procedural or process changes based upon user feedback, performance trends, or root cause analysis of problems.
- Senior managers of the major organizational functions were chastised, by executive management when necessary, for any lack of management interaction, technical process integration, or focus upon a common enterprise objective.
- Primary overall responsibility for preparing the project/program/portfolio methodologies and processes and for defining the associated technical and administrative procedures and practices was centralized and *not* split among the major operational organizational functions.

The set of key operational, organizational, and management traits common to successful vision, mission, and policy statements and procedural systems are:

- The vision for each major functional organization—including the PBMO—was defined, well documented, and integrated with all the related organizational visions.
- The missions of each major functional organization—including the PBMO—was defined, well documented, and integrated with all the related organizational missions.
- Potential enhancement or modification of the OPBM and PBMO vision, mission, and policy statements and the associated project/program/portfolio management procedural system were also considered when setting revised enterprise strategies, modifying key business objectives, or changing enterprise-level resource plans.
- The vision and mission for the enterprise and the vision, mission, and policies of its operational functional organizations, and the related procedural systems, evolved over a period of years using a master plan.
- The elements of the enterprise's policies as expressed in the associated procedural systems and related control systems, and their hierarchical relationships, were clearly defined and understood.
- In most cases, the responsibility and authority for the project/program/portfolio management procedural system was *not* spread across major operational organizational elements and therefore was *not* controlled by any of those fiefdoms. This ensured that the enterprise did *not* produce organizationally unique project/program/portfolio management policies, procedural systems, or records that were of limited value to the overall enterprise.
- Important task information commonly only found in the memory of experienced personnel was documented. As a consequence, the overall work process flow was well integrated with the enterprise's general management policies, and was represented in the project/program/portfolio business management methodologies, processes, and supporting procedural system.
- Multiple layers of documents were reduced and redundancy and overlap across multiple organizational functions were eliminated from the various documents in the enterprise's various systems. Employees then performed similar tasks in a similar manner on similar projects/programs/

portfolios or operations.

- Applicable requirements were identified and clearly understood and documents did not just pass responsibility for interpretation and implementation to the next layer in the project/program/portfolio management or operational management organizations.
- Methodologies, processes, and procedures did not include explanation-type information (which belongs in training documentation), thereby increasing usability and reducing problems with updating the documents.
- Working personnel were able to identify all methodologies, processes, and procedures applicable to their work. In addition, most personnel did not feel the procedures were an insult to the employee's intelligence. This led in most cases to an attitude among project/program/portfolio and operations personnel that the methodologies, processes, procedures, and documentation were of great value.
- Identification and handling of the potential impact of new or revised requirements or of new upper-tier documents on lower-tier documents was well managed.

In general, methodology, process, procedure, and practice preparation are *not* viewed within those enterprises as a nontechnical or basic administrative task. Consequently, personnel performing these tasks were highly regarded by their peers, managers, and senior personnel. Technical writers with appropriate understanding, and personnel who made the grade in their line organization were assigned to this work. In many cases, these individuals had, or received, training in requirements analysis, overall process understanding, or known methods of implementing industry-proven standards, guidelines, and procedural systems. They were usually given a schedule and adequate time to prepare the methods, processes, and procedures. The result was a necessary and sufficient number of procedures and procedural steps, a focus on supporting the enterprise's vision and mission, procedural integration, and minimal procedural redundancy between organizations. This also led to increased accountability, reduced training cost, significant interchangeability of personnel among portfolios, programs, projects, or operations, limited but adequate documentation and records, and good information automation.

Structured Development Approach for Visions, Missions, Policies, and Procedures

Enterprises with good operational management, project/program/portfolio management, and regulatory compliance histories have recognized that clearly written and concise visions, missions, policies, methods, processes, and procedures are vital to both their operations management and project/program/portfolio management. They have found their outdated policies and procedural systems no longer support the ever-changing environment in which an enterprise must now operate. Therefore, these enterprises took a more business-oriented look at restructuring and upgrading their vision, mission, and policy statements and related procedural systems, which included regular periodic reviews to determine if future upgrading was required.

The analysis of the results of many of these efforts led to a structured management approach that has been successful in restructuring and upgrading or modifying an enterprise's set of vision, mission, and policy statements and their related methodologies, processes, procedures, and practices. This approach is useful to management, enhances the work environment for personnel, and accommodates the numerous business and project/program/portfolio management factors driving enterprise operations and project business management.

The structured approach implements the concept of doing work and performing tasks simply, efficiently, and correctly the first time, in full compliance with all requirements. After an enterprise establishes a structured and integrated set of clear vision, mission, and policy statements and procedural systems and trains its employees, the following benefits become apparent:

- Costs of development and implementation are quickly offset by software applications, facilities, and production operations being on-line additional days and projects having better adherence to schedule.
- Quantity of required policies, methodologies, processes, procedures, and practices is reduced and remains limited.
- Project/program/portfolio management personnel performing tasks have both general and specific processes and procedures.
- Work can proceed without delays caused by repetitive training of employees or employee cross training on different procedures for the same task. Training time for all personnel is reduced.
- Employees need not stop work to consult disjointed volumes of procedures or ask questions of experienced personnel, because they lack documented processes and procedures.
- Both operations and project/program/portfolio management personnel trust the processes and procedures and maintain a habit of using them.
- Employee morale and job performance improve.

The structured approach to developing vision, mission, and policy statements and the related methodologies, processes, procedures, and practices is useful for those who must ensure that their Business Unit OPBM, and PBMO vision, mission, policy statements explicitly support the enterprise's strategic initiatives, meet strategic business objectives, government regulations, and address the needs of the enterprise's employees. This integrated approach applies system-engineering methods to the development process, to substantially reduce the potential for failure. This business approach completely defines all requirements for the procedural systems and establishes a system configuration that is proven, early-on, to be capable of meeting those requirements. Another key required element for success has been the active involvement of the chief executive officer and senior management in guiding the structuring and development of the vision, mission, and policy statements, and procedural systems.

This approach is successful because it also requires all levels of management to understand why the vision, mission, and policy statements and the related procedures are prepared; what benefits they provide; and how and by whom they must be developed and maintained. In addition, it requires portfolio, program, and project managers to know how the enterprise's and functional organizations' vision, mission, and policies can be communicated and used to show prudent management, help sustain profitability, and derive benefits and value from the enterprise's projects, programs, and portfolios.

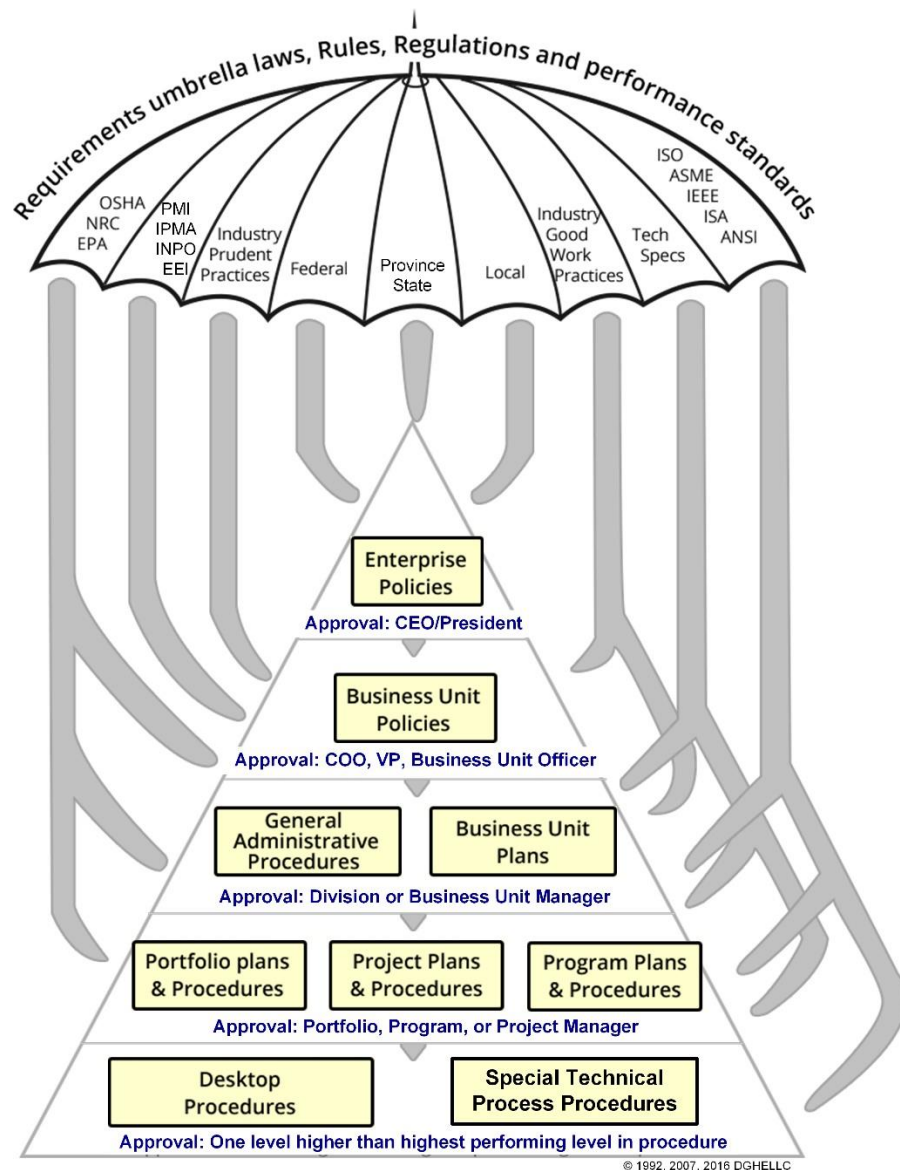
An analysis of successful structured project/program/portfolio business management procedural system development processes shows that they have the following sixteen common attributes:

- Strong executive and senior management leadership.
- Qualified development/modification team.
- Structured and implemented top down.
- Established vision, mission, and policy for the enterprise and all organizations.
- Documented local, state, province, and federal agency requirements being addressed.
- Documented discipline and practice standards being addressed.
- Enterprise-level policies set by major external/internal requirements.
- Procedures driven by technical and administrative work processes.
- All processes covered.
- Employee participation and responsibility.
- Staged implementation.

- Effective and focused communication.
- Management of change used to implement restructuring.
- Extensive enterprise-wide training.
- Established performance assessment program.
- Enterprise commitment to modify and upgrade.

The impetus for the development of, or the restructuring of, the vision, mission, and policy statements and/or any procedural system can come from the executive management level, but senior management's support and insistence that it be performed is necessary for any successful development, restructuring, or modification process. Strong leadership is required by both executive management and senior management to develop and maintain a project/program/portfolio business management system. That procedural system must be rooted in the enterprise's specific vision, mission, and policy statements for OPBM and the associated PBMO.

Figure 1: Top Down Requirements Relationship Hierarchy and Flow Down



Both external and internal requirements must be addressed in preparing the vision, mission, and policy statements and in developing the associated procedural systems. External requirements are derived from the company's *enterprise environmental factors*, which include a broad range of both mandatory and optional requirements such as pertinent laws and statutes established by local, state, province, and federal regulatory agencies and discipline and practice standards promulgated by professional organizations such as the Project Management Institute and the International Project Management Association. Internal requirements are derived from the company's *organizational process assets*, which include the enterprise's vision and mission, general management policies, enterprise goals, executive directives, and upper-level procedural documentation. These types of requirements are illustrated above in Figure 1, which shows an *enterprise environmental factors* umbrella that both supports and flows down to drive the enterprise's policies and its procedural systems. In addition, it illustrates that those external requirements, which are addressed in the internal documentation at one level of the documentation hierarchy, also flow down as requirements to the documentation in the next level of the hierarchy.

The top-down structuring of a project/program/portfolio business management procedural system lends itself to development through use of a cascading analysis process, which allows for structured review from each top external/internal requirement to the lowest internal implementing step. Each applicable requirement must be identified, properly and clearly documented, and placed within a hierarchy of requirements. Each policy, methodology, process, procedure, and/or practice should explicitly address one or more of those requirements. This ensures the procedural system will be defined in terms of sound realistic implementing steps that have been sequentially developed and logically and properly verified.

Management must recognize that developing vision, mission, and policy statements and any related procedural system is a major effort, affects all functions, and requires coordination. All members of the management team must understand their roles in creating, modifying, and upgrading any project/program/portfolio business management system. Management must show they recognize that an effective project/program/portfolio business management procedural system requires a significant commitment of resources, development time, follow through, and training. The chief executive officer must visibly support and drive the development program by continuous involvement – recognizing that all employees, not just management, have full responsibility for implementing and maintaining a cost-effective, quality-supporting procedural system. Management must also establish consequences for functional organizations and personnel who do not produce and operate cost-effective methods, processes, or procedures.

Effective communication, both oral and written, is required for successful project business management. Vision, mission, and policy statements and related procedures cover a broad area of written communication. They also represent the largest volume of permanent and reused written communication on a portfolio, program, project, or any operation.

The senior management team is responsible for determining, revising, or reaffirming the enterprise's vision, mission, general management policies, and long-range objectives. Each senior manager in turn establishes, revises, or reaffirms their functional organization's vision, mission, and policy statements to interface to, and integrate with, the vision, mission, and policy statements of the other functional organizations. The integrated set of organizational visions and missions should not overlap between functional organizations, nor omit any functional business area, and altogether they must support the enterprise's vision and mission. This team also defines and documents any enterprise-level value statements. Each functional organization's vision and mission is approved by the enterprise's officer representing that organizational function, and all affected officers and senior managers need to concur with the enterprise's value statements. Value statements are usually one paragraph to one page long. The enterprise's vision, mission, and value statements are usually presented together in a single page, sometimes oversized, graphic format with high textual content and associated management signatures.

Establishing Visions, Missions, and Policies for Project Business Management

Successfully employing Organizational Project Business Management (OPBM) and the PBMO, on an enterprise-wide basis, requires executive management to formally set forth the enterprise's long-term business-based vision and mission for OPBM. And, for management to establish the related and supporting project/program/ portfolio business management OPBM-based vision and mission for the PBMO. These OPBM and PBMO vision and mission statement documents must be approved by the enterprise's board of directors, and issued by the chief executive officer.

Well-developed visions and missions for OPBM and the PBMO are proven means of maintaining a business and strategic focus in the management of projects, programs, and portfolios and of minimizing negative inter-organizational politics. Some PBMO business units make a laminated card with the two vision and mission statements printed on it in bold letters, which can be carried in a shirt-pocket, or worn around the neck on a lanyard.

Implementing OPBM and establishing a supporting, sustainable and successful PBMO is a significant business undertaking. Your enterprise will need to address this development task in a strategic manner. This requires a working knowledge of the meaning of the terms vision, mission, and policy. The business meanings of which are given below:

- *Vision*: In business, it is a statement of the desired and imagined end-result, which an enterprise or business unit envisions, plans, and commits to achieve an organizationally desirable end-point. It is roughly similar to the concepts of purpose or aim, since the anticipated result guides action towards the object, either a physical object or an abstract object or both, that has intrinsic value. It can include economic, commercial, political, environmental, social, or technological aspects. It is a clear, distinctive, and specific view of the future desired state of the enterprise, or the specific business unit. It is a one-to-three sentence statement that is concise and to the point.
- *Mission*: In business, it is a statement cogently articulating the purpose of an enterprise or business unit, giving its reason for existing. It provides the framework or context within which the enterprise's or business unit's strategies are formulated and guides decision-making. It is a one-to-three sentence statement that is concise and to the point.
- *Policy*: In business, it is a brief statement set forth by senior management that defines those courses of action selected to influence or direct management and employee decisions, actions, and other related matters with respect to a specific business situation or operation. It is a guiding principle or standard of conduct, usually based upon internal and external requirements, considered prudent, expedient, or advantageous by executives of the enterprise. The policy statement is prepared as a single-topic, concise, one-page document. The body contains five major sections followed by an authorization. The document may also contain a one-to-three sentence summary statement covering only the policy, intent, and applicability.
 - Policy Statement: Simple, direct statement of the policy, excluding qualifiers about intention, applicability, or implementation. The maximum length is three sentences.
 - Policy Intent: Statement of policy goal provided by using an action verb at the beginning of each sentence to designate what the policy should accomplish.
 - Applicability: Statement of which organizational element(s) are governed by the policy.
 - Implementation: Statement of how policy is to be implemented and maintained, including what must be established, how the policy will be communicated, and identify the activities needed to implement the policy.
 - Source Documents: Identification of internal or external requirements documents that define, identify, or establish the policy requirements and are incorporated by reference into the policy.
 - Approval Authority: Title and signature.

A basic understanding of the OPBM construct and Project Business Management (PBM), as shown below in Figure 2 – OPBM Framework and PBM Model, and the PBM Organization is also a requirement in initiating this development work. The OPBM and PBMO business constructs are based upon our Project Business Management Framework and Model—which, in Figure 2, is illustrated in the right most graphic.

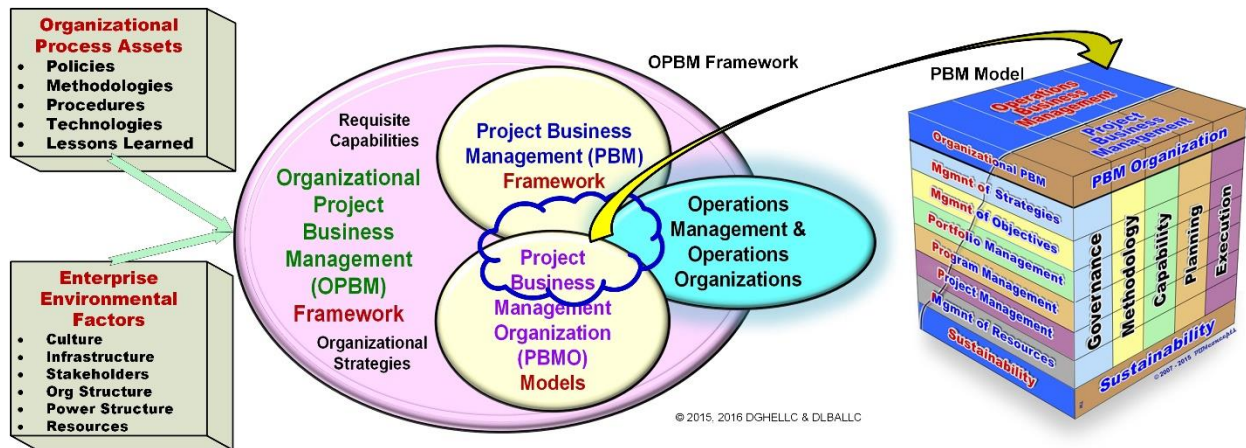
Project Business Management (PBM) is the business strategy and management framework underlying Organizational Project Business Management, that drives the use of integrated general business management and project management knowledge, skills, tools, and techniques—when applying project-portfolio, project-program, and project processes, methodologies, and procedures within an enterprise's business context and structure—to meet or exceed stakeholder and customer needs. PBM is employed within an

enterprise by a Project Business Management Organization to derive benefits from, and captures value through, any project-related actions and activities utilized to accomplish the enterprise’s strategic initiatives and related business objectives.

The Organizational Project Business Management (OPBM) construct can be defined in business terms as the framework of organizational strategies with requisite capabilities that utilizes a Project Business Management Framework and Project Business Management Organization Models to provide the systematic business-oriented management of an enterprise’s project-portfolios, project-programs, and projects. OPBM organizationally facilitates the business-based selection, prioritization, and execution of projects to effectively and efficiently accomplish the enterprise’s strategic initiatives, and related business objectives—and establishes a sustainable competitive business posture and culture. Or, more simply put, a business management-construct employing an executive-led Project Business Management Organization to perform the application and implementation of a Project Business Management Framework on an enterprise-wide basis.

The related Project Business Management Organization (PBMO) is defined in business terms as the organizational business function within an enterprise that institutes and manages the Project Business Management processes for project-portfolios, project-programs, and projects. Positioned at the executive level of the enterprise, it is the organization accountable for enterprise-wide development, distribution, and implementation of Organizational Project Business Management (OPBM). The PBMO is a corporate business function, with a title and responsibility similar to traditional business functions—such as finance, engineering, marketing, sales, manufacturing, information technology, etc.—that provides leadership and has ownership of its respective functional discipline.

Figure-2: OPBM Framework and PBM Model



Establishing the OPBM Vision, Mission, and Policy Statements

During our PMO case study research, we delved into the construct and organizational concept of Organizational Project Business Management (OPBM) and documented those research results in our book, *A Compendium of PMO Case Studies – Volume II: Reflecting Project Business Management Concepts* (Holland, MI: PBMconcepts, 2016). We did not include survey questions explicitly about the enterprise’s OPBM vision, mission, and policy statements. However, we generated the following example statements using the development guidance given above and how those case study enterprises actually approached OPBM. We provide them below for consideration in developing your enterprise’s statements:

- *OPBM Generic Vision Statement Example:* To establish the organizational function and environment within the enterprise that enables employing an executive-led Project Business Management

Organization to apply and uniformly implement Project Business Management on an enterprise-wide basis.

- *OPBM Generic Mission Statement Example:* To create a culture across the enterprise so all enterprise personnel become a partner with the PBMO professional staff and those business units that manage projects, programs, and portfolios and drive towards excellence in project management.
- *OPBM Generic Policy Statement Example:* [Summary-Level] – All projects, programs, and portfolios will be identified, scoped, prioritized, selected, executed, and managed in accordance with the enterprise’s established Project Business Management methodologies, processes, procedures, and practices as promulgated by the Project Business Management Organization (PBMO).

Establishing the PBMO Vision, Mission, and Policy Statements

In addition, during our PMO case study research, we delved deeply into the models, framework, and organizational concepts of the Project Business Management Organization (PBMO) and documented those research results in Volume II of our PMO Case Studies book, as noted above. We did have survey questions explicitly about the enterprise’s PBMO vision and mission statements. Each of the eight PMO Case Study enterprises provided well-structured statements that conform to our development guidance as given above.

Quoted below are the vision statements from three of those eight enterprises, for your consideration in developing your PBMO vision statements. Each enterprise quoted is in a different industry:

- *Mayo Clinic PMO Vision:* “The EPMO Vision is to enable the sustainability of Mayo Clinic and the EPMO by accelerating the pace of change through efficient execution of Mayo Clinic strategic priorities.”
- *Duke Energy PMO Vision:* “Duke Energy’s PMCoE vision is to become the industry leader in project management.”
- *Doe Run PMO Vision:* “The vision of the Enterprise PMO is ‘the right projects, done right.’”

Also quoted below are the mission statements from two of those eight enterprises, for your consideration in developing your PBMO mission statements.

- *Ministry Health Care PMO Mission:* “The MHC Enterprise Project Management Organization provides outcome-oriented results by leading teams through high quality, consistent project management practices throughout the project life cycle, ultimately helping Ministry Health Care successfully achieve its strategic objectives.”
- *The Doe Run Company PMO Mission:* “The Enterprise PMO mission is to create an environment of Project Management professionalism where: Project success is the norm; Project teams are proud of their work; Internal customers reap the benefit of a carefully planned investment; and External customers win through improved service or lower cost.”

We did not include survey questions in our PMO case studies explicitly addressing the enterprise’s Project Business Management Organizational (PBMO) policy statements. However, using the development guidance given above and how those enterprises actually approached implementing and operating a PBMO, we generated the following example policy statement. We provide it below for consideration in developing your enterprise’s PBMO policy statements:

- *PBMO Generic Policy Statement Example:* [Summary-Level] – It is the role and responsibility of the Project Business Management Organization (PBMO) to create, establish, maintain, implement, provide training, and oversee the implementation and application of the Project

Business Management methodologies, processes, procedures, and practices, which are to be used by all business units to perform project-portfolio, project-program, and project management across the enterprise.

Conclusion

Executives and senior managers must explicitly drive, and be involved in, establishing formal institutionalized vision, mission, and policy statements for all of the enterprise's operational business management functional organizations. These strategic business based documents have been shown to be required to successfully implement and manage those business management functions that operated on an enterprise-wide basis, including Organizational Project Business Management, and its Project Business Management Organization.

Enterprises that have a structured development approach to creating visions, missions, policies, and procedural systems have thereby developed good operational management, project/program/portfolio management, and regulatory compliance histories. Those enterprises recognized that clearly written and concise visions, missions, policies, methods, processes, and procedures are vital to the success of both their operations management and project/program/portfolio management. Their structured development approach fully implements the strategic business concept of doing work and performing tasks simply, efficiently, effectively, and correctly the first time, in full compliance with all requirements and in direct support of the enterprise's strategic initiatives.

Our research shows that successfully employing Organizational Project Business Management (OPBM) and a Project Business Management Organization (PBMO) on an enterprise-wide basis requires executive management to formally set forth the enterprise's long-term business-based vision and mission for OPBM. Having well developed visions and missions for the enterprise, OPBM, and the PBMO is a proven means of maintaining a business focus and a strategic focus in the management of projects, programs, and portfolios. It promotes producing the value and benefits the enterprise desires to obtain from the execution and implementation of its project, programs, and portfolios, while minimizing negative inter-organizational politics.



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He assists organizations, as a Project Business Management Organization (PBMO) Subject Management Expert (SME) consultant, to achieve their enterprise’s strategic business and tactical objectives. He provides analysis of their management structures, business processes, general business operations, and project management capabilities, while supplying specific recommendations on business, methodology, and process improvements. Mr. Hubbard also assists companies, as an outside third party, with the intricacies of the due diligence process in their merger and acquisition activities. He also supports companies in the managerial development and establishment of their Project/Program/Portfolio Organizations (PMOs) and delivers workshops and seminars focusing on the business management aspects of project management.

Mr. Hubbard holds a bachelor’s degree in both mathematics and physics with a minor in chemistry from Minnesota State University at Moorhead. He is a registered Professional Engineer in Control Systems in California. Mr. Hubbard joined the Project Management Institute (PMI) in 1978 (#3662), is a charter member of the PMI San Diego Chapter, and was deputy project manager for the Project Management Body of Knowledge (*PMBOK®*) *Guide* Third Edition ANSI Standard by PMI. He was the Exhibitor Chairperson for the 1993 PMI North American Congress/Seminar/Symposium, is a published author of many articles, a presenter at several PMI Congresses and other Project Management Symposiums, and a guest speaker at PMI and IIBA Chapter meetings. Mr. Hubbard is also a Life-Member of the International Society of Automation (ISA).

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Dennis Bolles, PMP, President – DLB Associates, LLC, has over forty-five years of experience in multiple industries providing business and project management professional services. He assists organizations, as a Project Business Management Organization (PBMO) Subject Matter Expert (SME) consultant, to achieve their business strategic objectives with the analysis of their business process improvement needs and development of business and project management capabilities.

He has been a member of the Project Management Institute (PMI) since 1985, received his PMP® certification in 1986 (#81), and is a founding member of the PMI Western Michigan Chapter, serving on its Board of Directors and in several positions since its 1993 inception.

Mr. Bolles performs speaking engagements and assists Project/Program/Portfolio Organizations (PMOs) start-up teams begin the planning and implementation processes; conducts on-site organizational project management capability assessments. He provides virtual and periodic on-site support for development of business and project management methodologies, policies, procedures, processes, systems, tools, and templates for organizational governance and corporate strategy. He assists in the implementation of a project business management methodology that integrates strategic planning, business objective development, portfolio management, program management, and project management processes to achieve strategic objectives and maximize operational efficiency enterprise-wide through the development and management of Project Management Organizations.

Mr. Bolles served as the PMI Standards Project Manager who led the project core team to a successful completion and on-time delivery of the Project Management Body of Knowledge (*PMBOK*®) *Guide* Third Edition in 2004. He has served on and has contributed to multiple PMI Standards bodies over the past 20 years.

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