Project Management Tools

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CCR: Technical Project Management

2016 Building Leaders for Business

Topics to be covered

- Introduction – Who am I ?
- Soap Box – Buy In.
  - Three things to take away.
    - Assessment process
    - Levels of maturity
    - Importance of Tools (SMART…)
- Steps to Assessing & Maintaining a Tool (& PMO)
  - Step 1:   Review what Assessment is
  - Step 2:   Scope & Approach
  - Step 3:   Application of the assessment
  - Step 4:   Repeat

- Tool Examples – DAIR Log
- Questions & Answers

This session will cover 3 levels of tools maturity:
- Basic List
- Automated List
- Centralized Data with automation (Many editing at once)

Key Takeaways:
- A good understanding of the importance of tools in there project management
- What information to track within their tools with an understanding where that information should be tracked. (On the Project schedule vs. an Action Log)…
- Ability to start developing or modifying their existing tool set.
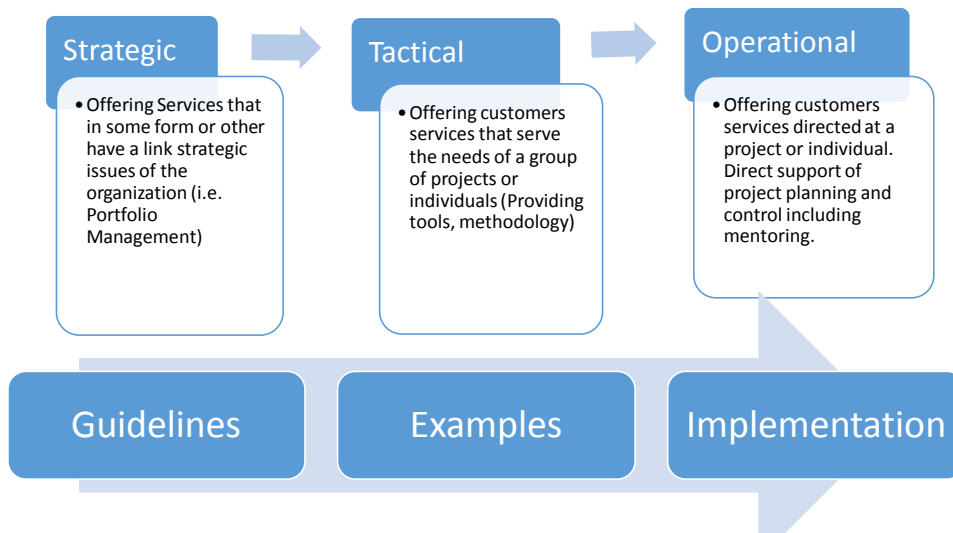
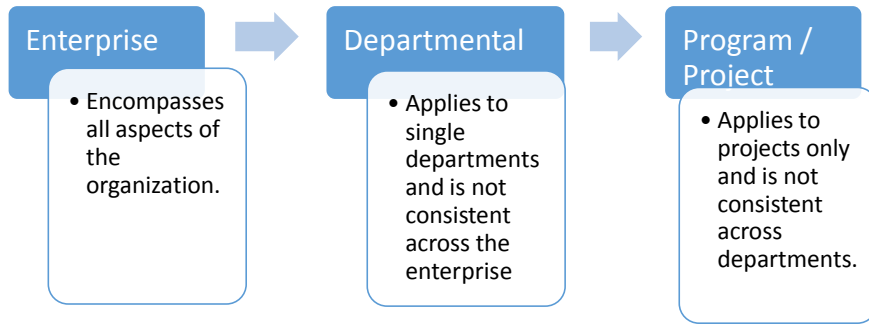# PMO Tools and Assessments

30 + Years Experience

IT specific

Programmer at Heart
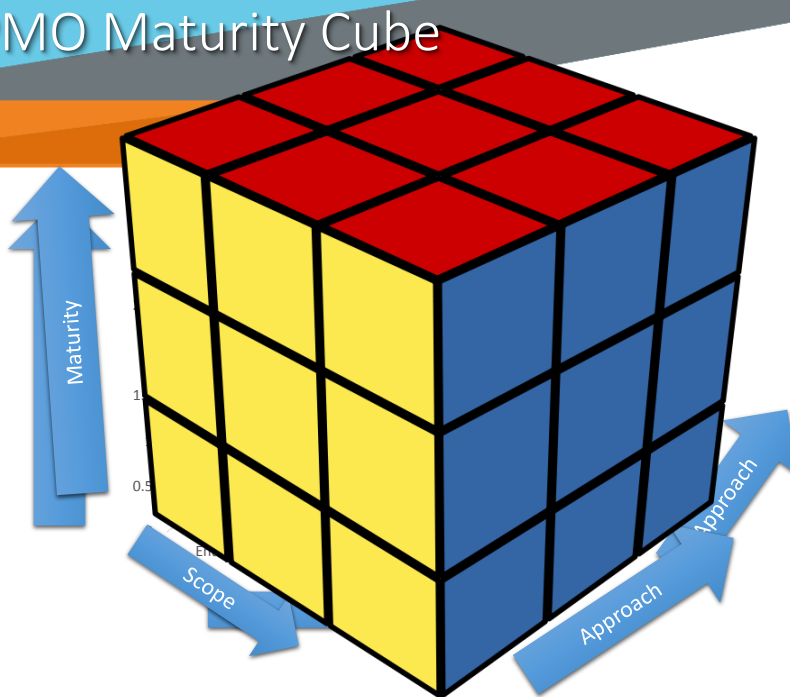
Passion for Process Improvement

Approach Assessment

Strategic
- Offering Services that in some form or other have a link strategic issues of the organization (i.e. Portfolio Management)

Tactical
- Offering customers services that serve the needs of a group of projects or individuals (Providing tools, methodology)

Operational
- Offering customers services directed at a project or individual. Direct support of project planning and control including mentoring.

| Guidelines | Examples | Implementation |

Scope Assessment

Enterprise
- Encompasses all aspects of the organization.

Departmental
- Applies to single departments and is not consistent across the enterprise

Program / Project
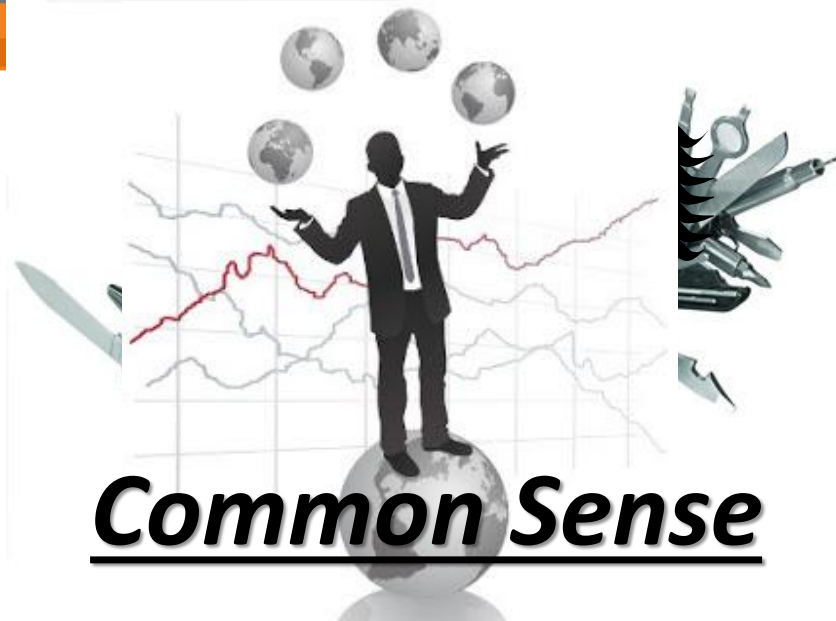- Applies to projects only and is not consistent across departments.

PMO Maturity Cube

The Greatest Tool For a PMO ?

Common Sense

Step 1: Assessment

- History
- Culture
- Perceptions of PMO capabilities
- Mission & Vision
- Gap Analysis

Step 1: Assessment

GAP Assessment

- Given where you are & Where you want to be Identify the gaps as potential areas for development
- Review Levels of Service

Managing one or more portfolios

Service: A.1.7 - (Scope: Enterprise/Approach: Strategic)
Levels of maturity in carrying out the service:

• Level 0 – The PMO does not provide this service.

• Level 1 - The PMO maintains a list of active projects throughout the organization.

• Level 2 – Level 1 + establishes their prioritization but does not follow a structured portfolio management process.

• Level 3 – Level 2 + Acting as facilitator in
the definition (identification, categorization, evaluation, selection), development (prioritize, balance and commitment) and implementation (monitoring, review and change management) of the portfolio.

• Level 4 – Level 3 + The PMO uses an integrated system to
automate the organization's portfolio management process.

Develop and implement the project management methodology

Service: A.2.1 - (Scope: Enterprise/Approach: Tactical)
Levels of maturity in carrying out the service:

• Level 0 - The PMO does not provide this service.
• Level 1 - The PMO has developed a basic methodology for the organization, but it is not used consistently on all projects.
• Level 2 - The PMO has developed a standard methodology for the organization, aligning possible existing methodologies in different areas, and the methodology used in most projects in the organization.
• Level 3 - The PMO has developed a standard methodology for the organization, and it is used by all projects as it is mandatory unless a specific waiver is requested and approved.
• Level 4 - The PMO has developed and improved the standard methodology for the organization focusing on best practices and continuous improvement.

Monitor and control project & program performance

Service: A.3.3 - (Scope: Enterprise/Approach: Operational)

Levels of maturity in carrying out the service:

- Level 0 - The PMO does not provide this service
- Level 1 - The PMO monitors and controls the project /program performance

considering time, cost, quality and customer satisfaction and provides follow-up

reports without analysis upon request.

- Level 2 – Level 1 + analyzes the available data.
- Level 3 - Level 2 + takes preventive and corrective actions working proactively with project /program manager and senior management.
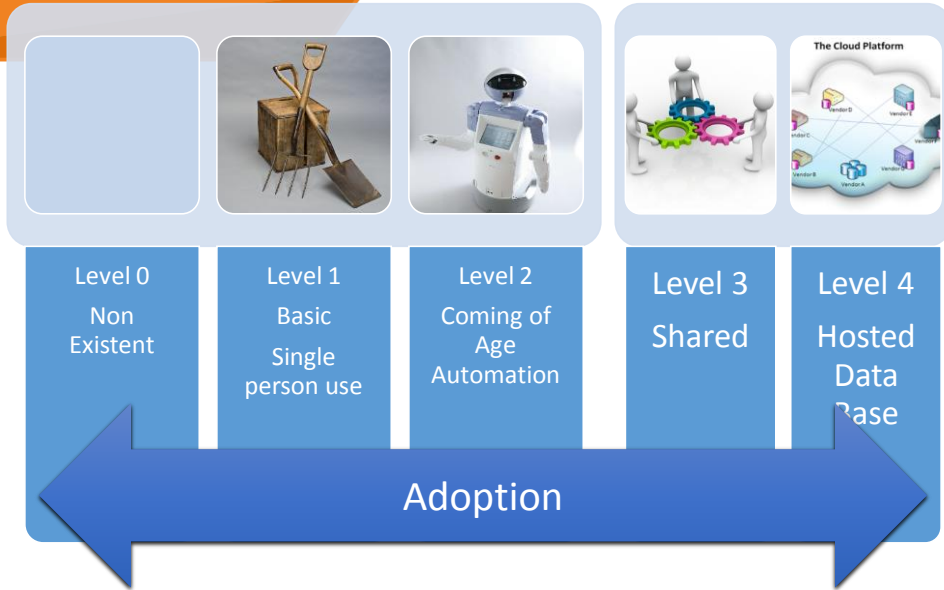
Develop a Menu of Services Cont…

- Consulting Services
  - Project Scope
  - Project Estimation
  - Project Planning
  - Full Lifecycle Project Management
  - Mentoring

- Tools
  - PM Information Systems

- Professional Organizations
  - PMI Membership Encouragement
  - PMI Membership Fee Reimbursement
  - Host Chapter Meetings

Tools Maturity

Level 0	Level 1	Level 2	Level 3	Level 4
Non Existent	Basic Single person use	Coming of Age Automation	Shared	Hosted Data Base

Adoption

DAIR Log Example

So What's my Score?

PMO Assessment Cube Score

	Strategic	Tactical	Operational
Enterprise	1.00	1.28	1.38
Departmental	1.75	1.94	2.19
Program/Project	1.70	2.31	2.25
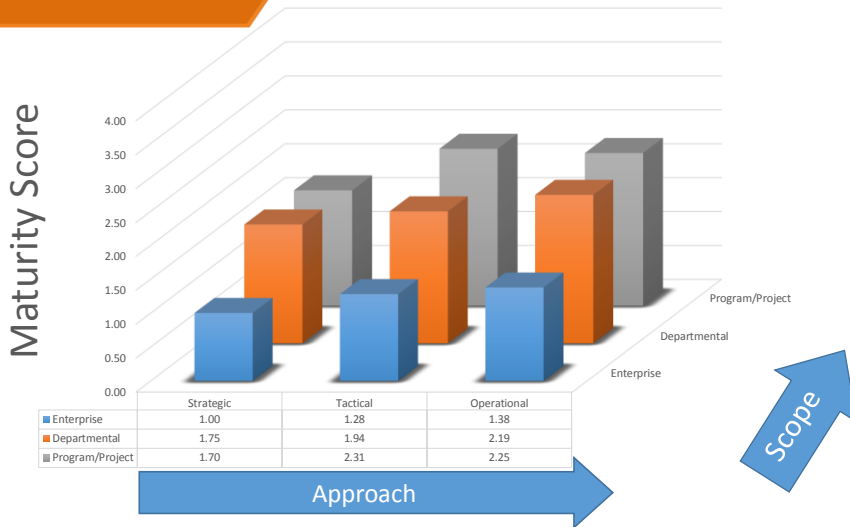
So What's my Score w/ SAAS tool

Comparison with using SAAS Tool

	Strategic		Tactical		Operational	
	Average of Score	Average of With SAAS tool Score:	Average of Score	Average of With SAAS tool Score:	Average of Score	Average of With SAAS tool Score:
Enterprise	1.00	2.30	1.28	2.61	1.38	2.06
Departmental	1.75	2.40	1.94	2.67	2.19	2.38
Program/Project	1.70	2.20	2.31	3.06	2.25	2.31
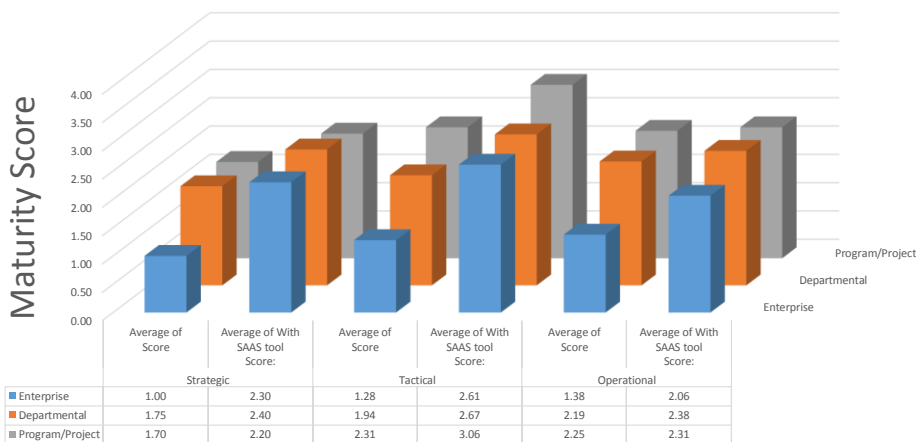
42 of 75 Questions are bumped to Max Score using SAAS Tool

PMO Assessment and Goal Setting

Just like Project Management - S.M.A.R.T.

- **S** – Specific
- **M** – Measurable
- **A** – Attainable
- **R** –Realistic Responsible
- **T** – Time-Bound
- **E** – Evaluate
- **R** - Reevaluate

PMO Tools and Assessments

Thank You!

PMO In A Box, Inc.

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Questions?

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Thank You!

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