

Project Portfolio Management

Current State Scorecard

PREPARED FOR:

David Duffy
Info-Tech Research Group

Fill out by yourself or with your team.



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INFO~TECH

RESEARCH GROUP

Data is comprised of feedback from 12 respondents, including: Craig Hockenbrough, Sarah Janes, Alvaro Jimenez, Martin King, Bob Klehm, Eduardo Lessa, Alan Levin, John McLaughlin, Shawn OConnell, sunil pinnamaneni, thomas streicher, Bryan Tuthill

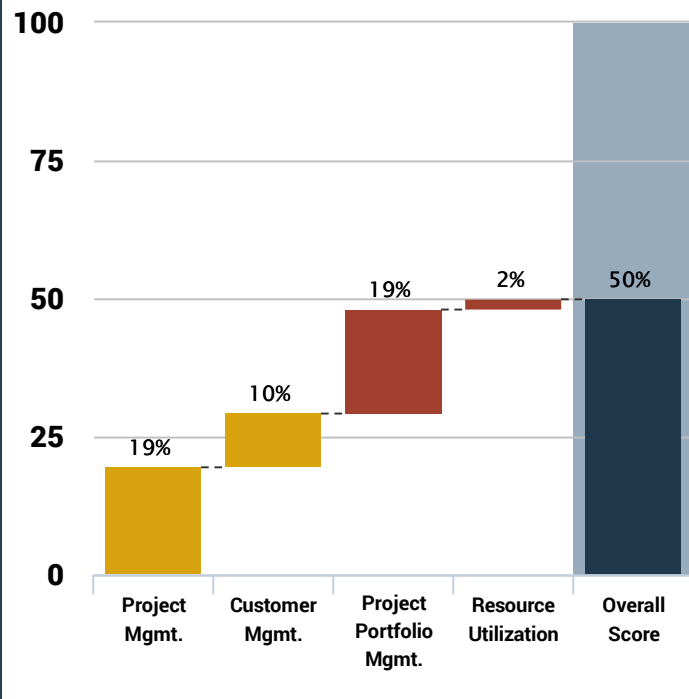
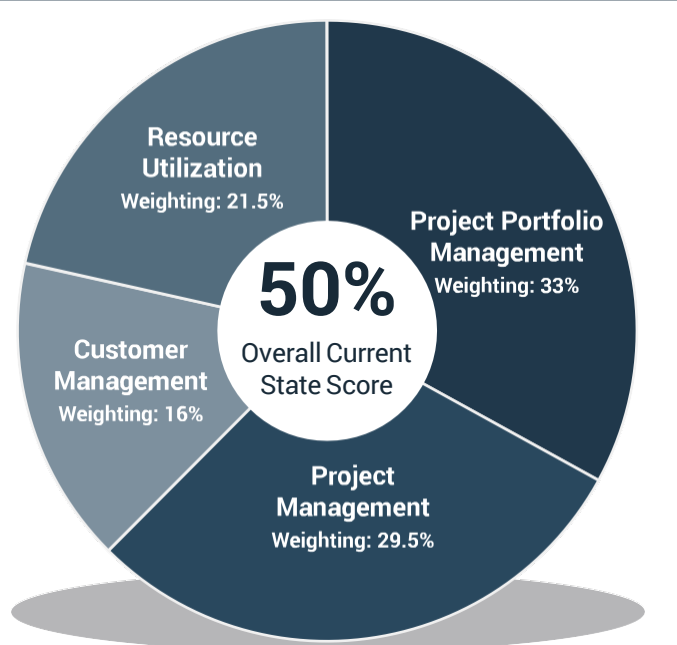


Use the information in this report to understand your Project Portfolio Management environment and identify areas for improvement.

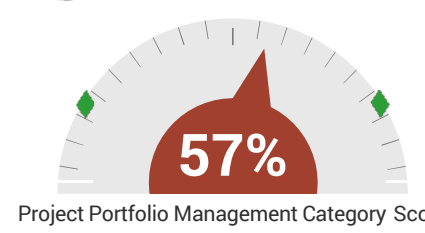
Scores in this report are based on the knowledge and perceptions of the Portfolio Owner, and are calculated using Info-Tech's weighting scale. Weightings in each category and subcategory, see the "Scoring Methodology" section of this report.

Evaluate PMO performance across 4 areas and 24 sub-areas. Determine which areas require improvement and use this report to help you get there.

OVERALL CURRENT STATE SCORE

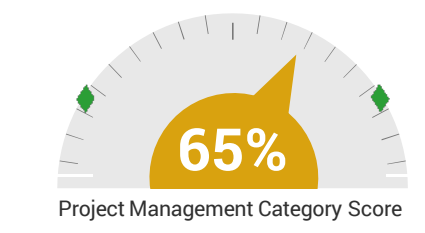


PROJECT PORTFOLIO MANAGEMENT



Project Portfolio Report Completeness Subcategory Weighting: 8%	Score 3.3/6	Project Portfolio Report Currency Subcategory Weighting: 19%	Score 3.4/6
Capacity Awareness Subcategory Weighting: 16%	Score 2.8/6	Resourcing Subcategory Weighting: 11%	Score 3/6
Strategic Alignment Subcategory Weighting: 15%	Score 4.3/6	Alignment with Operational Goals Subcategory Weighting: 11%	Score 4.1/6
Backlog Subcategory Weighting: 11%	Score 3.3/6	Capacity Quality Subcategory Weighting: 9%	Score 3.3/6

PROJECT MANAGEMENT



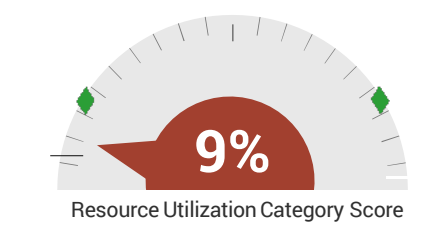
Quality Subcategory Weighting: 20%	Score 4.1/6	Communication Subcategory Weighting: 13.5%	Score 3.2/6
Productivity Subcategory Weighting: 10%	Score 3.6/6	Agility Subcategory Weighting: 7%	Score 3.6/6
Projects Delivered on Time Subcategory Weighting: 17%	Score 4.2/6	Projects Delivered on Budget Subcategory Weighting: 13.5%	Score 3.8/6
Projects Delivered in Scope Subcategory Weighting: 19%	Score 4.4/6		

CUSTOMER MANAGEMENT



Clarity of Business Goals Subcategory Weighting: 25%	Score 3.8/6	Analysis of Requirements Subcategory Weighting: 19%	Score 3.5/6
Involvement in Testing Subcategory Weighting: 31%	Score 3.3/6	Leadership in Change Communication Subcategory Weighting: 25%	Score 3.8/6

RESOURCE UTILIZATION



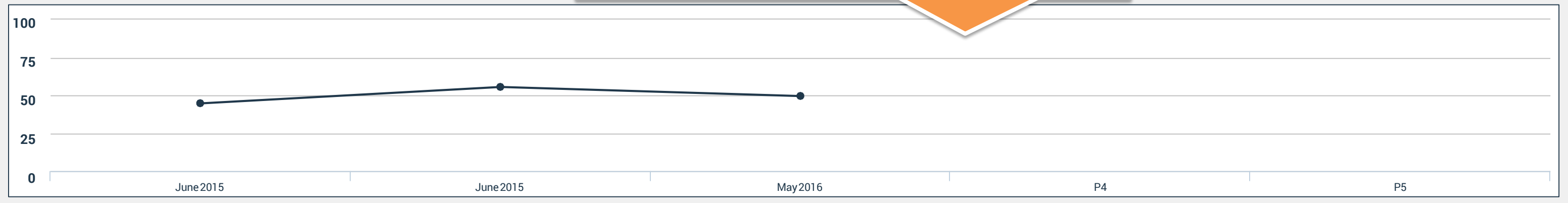
Cancelled Projects Subcategory Weighting: 28%	Waste 9%	Inefficiency Subcategory Weighting: 14%	Waste 16%
Suboptimal Assignment of Resources Subcategory Weighting: 9%	Waste 8%	Unassigned Resources Subcategory Weighting: 26%	Waste 6%
Analyzing, Fixing, Re-Deploying Subcategory Weighting: 23%	Waste 15%		



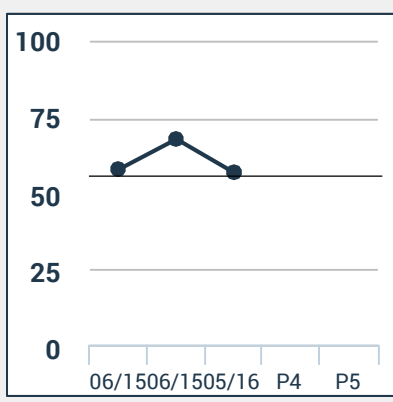
This page compares your current scores with those of previous periods

See how your performance is changing over time. Use this to communicate success to your team or stakeholders.

OVERALL CURRENT STATE SCORE

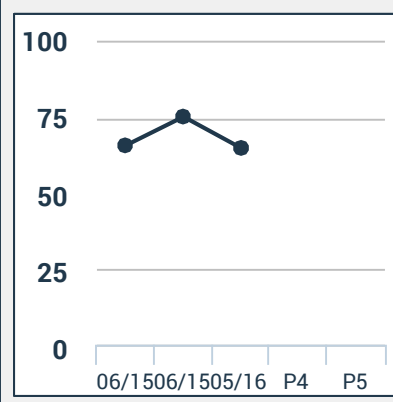


PROJECT PORTFOLIO MANAGEMENT



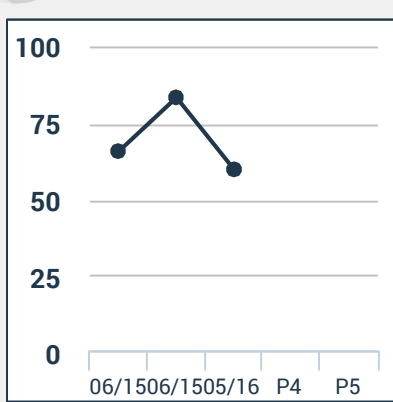
	06/15	06/15	05/16	P4	P5
Report Completeness	3.8/6	4.0/6	3.3/6		
Report Currency	4.1/6	4.0/6	3.4/6		
Capacity Awareness	3.0/6	4.8/6	2.8/6		
Resourcing	3.5/6	4.3/6	3.0/6		
Strategic Alignment	3.4/6	4.0/6	4.3/6		
Alignment with Operational Goals	2.8/6	3.8/6	4.1/6		
Backlog	3.6/6	3.8/6	3.3/6		
Capacity Quality	3.8/6	4.0/6	3.3/6		

PROJECT MANAGEMENT



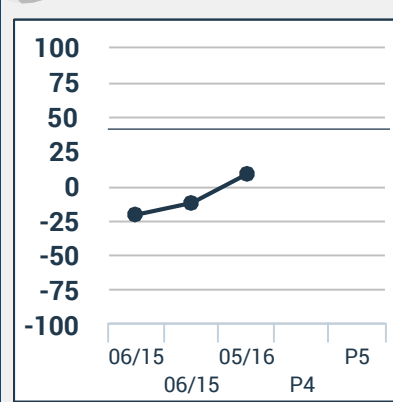
	06/15	06/15	05/16	P4	P5
Quality	3.8/6	4.5/6	4.1/6		
Communication	3.5/6	4.5/6	3.2/6		
Productivity	4.0/6	4.8/6	3.6/6		
Agility	3.8/6	4.8/6	3.6/6		
Projects Delivered on Time	4.1/6	5.0/6	4.2/6		
Projects Delivered on Budget	4.3/6	4.5/6	3.8/6		
Projects Delivered in Scope	4.3/6	4.0/6	4.4/6		

CUSTOMER MANAGEMENT



	06/15	06/15	05/16	P4	P5
Clarity of Business Goals	3.6/6	5.0/6	3.8/6		
Analysis of Requirements	4.1/6	4.8/6	3.5/6		
Involvement in Testing	4.1/6	5.3/6	3.3/6		
Leadership in Change Communication	4.0/6	5.0/6	3.8/6		

RESOURCE UTILIZATION



	06/15	06/15	05/16	P4	P5
Cancelled Projects	20.4%	21.3%	9.4%		
Inefficiency	12.6%	10.0%	15.9%		
Suboptimal Assignment of Resources	13.5%	16.3%	7.7%		
Unassigned Resources	13.6%	12.8%	5.6%		
Analyzing, Fixing, Re-Deploying	10.4%	6.8%	15.4%		

Get a prioritized list of PMO areas requiring immediate attention. Use this to focus work effort and build improvements.



This section consolidates and prioritizes the recommended action items that are currently solid, and maintain the effective practices you currently have in place.

es that are currently solid, and maintain the effective practices you currently have in place.

Resource Utilization
Analyzing, Fixing, Re-Deploying

Waste: 15%

! HIGH

Action
Make sure that quality and completeness are more important than pushing projects through to completion if they aren't truly done. Proper pacing of the project may result in missing a target date, but will ultimately avoid waste by reducing costly defects and unplanned phase two clean-up projects.

Resource Utilization
Cancelled Projects

Waste: 9%

! HIGH

Action
Formalize and streamline the new project request process in a single "channel" such as an intranet request form. Reduce cancelled project waste by ensuring that the wrong projects are not getting started, at-risk projects are cancelled or re-scoped as early as possible, and that you're not approving too many projects.

Project Portfolio Management
Capacity Awareness

Score: 2.8/6

! HIGH

Action
Make the portfolio managers responsible for a current view of the organization's capacity (i.e., maximum potential capacity, current allocation, and current available capacity), along with capacity projections into the near-term future.

Project Portfolio Management
Project Portfolio Report Currency

Score: 3.4/6

! HIGH

Action
If the portfolio data takes too much time to maintain, reduce the scope of the data or increase the resourcing allocated to it. Use the reports for regular portfolio reviews and new funding decisions to reinforce the fact that they need to be maintained.

Customer Management
Involvement in Testing

Score: 3.3/6

! HIGH

Action
Work with the customer throughout the project to develop documented evidence of how to test/validate project completion.

Project Portfolio Management
Resourcing

Score: 3/6

! HIGH

Action
Develop and maintain a database of the people and their applicable skill sets. This information is critical to the ability to forecast capacity into the future.

Project Management
Communication

Score: 3.2/6

! HIGH

Action
Project communication starts with a broad awareness of resourcing. Communicate the gaps between allocated resources and actual time spent on the project. Then focus on project status and project interdependencies.

Project Portfolio Management
Backlog

Score: 3.3/6

! HIGH

Action
Reduce the project backlog to the level that can be delivered in a reasonably short period (no longer than one fiscal year). It's unrealistic for pending projects to retain their scope for long periods, and it should be up to the requestor to maintain that request.

Project Portfolio Management
Capacity Quality

Score: 3.3/6

! HIGH

Action
Review the quality of work estimates and improve the approach through training and project management. Also make sure you're not over-allocating project work: either prioritize the project work above the non-project work, or reduce the project allocation.

Project Portfolio Management
Project Portfolio Report Completeness

Score: 3.3/6

! HIGH

Action
Make sure you've got current lists of active and pending projects, at a minimum. Review these reports with stakeholders to determine what's missing - or what should be removed. Remember that these reports do not have to be the definitive source of all project data; they need to help leaders decide on funding and resourcing priorities.

Project Portfolio Management

Customer Satisfaction



To be completed by customers of the PMO as well as the head of the PMO or Portfolio Owner.

PREPARED FOR:

Barry Cousins, Senior Director, PMO Practice
Info-Tech Research Group



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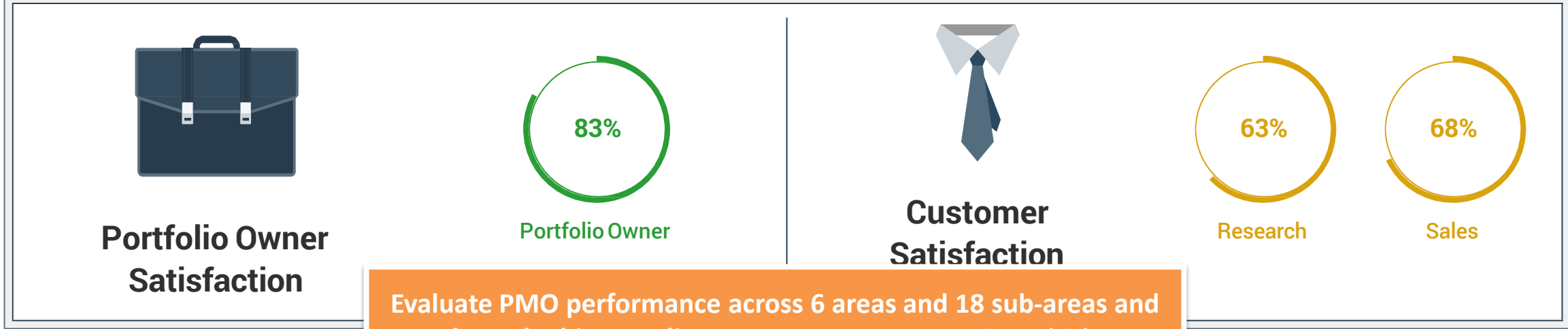
Data is comprised of feedback from 5 respondents, including: Barry Cousins, Barry Cousins, Matt Burton, Trevor Bieber, Travis Duncan



CUSTOMER SATISFACTION BY DEPARTMENT

These scores express customer satisfaction by department. They represent relevant response categories.

See overall PMO satisfaction and compare customer satisfaction with Portfolio Owner self-assessment.



Evaluate PMO performance across 6 areas and 18 sub-areas and see where the biggest alignment gaps are. Determine which areas require improvement and use this report to help you get there.

CUSTOMER SATISFACTION BY CATEGORY

PROJECT DELIVERY	CATEGORY SCORE: 69%
Project Delivered On Time Weighting: 8.0	Portfolio Owner: 83% Customer Avg.: 58% GAP: 25%
Projects Delivered On Budget Weighting: 5.0	Portfolio Owner: 83% Customer Avg.: 67% GAP: 16%
Projects Delivered In Scope Weighting: 9.0	Portfolio Owner: 83% Customer Avg.: 79% ALIGNED

PROJECT MANAGEMENT	CATEGORY SCORE: 73%
Quality Weighting: 8	Portfolio Owner: 83% Customer Avg.: 75% GAP: 8%
Communication Weighting: 7	Portfolio Owner: 83% Customer Avg.: 67% GAP: 16%
Productivity Weighting: 4	Portfolio Owner: 83% Customer Avg.: 83% ALIGNED
Agility Weighting: 6	Portfolio Owner: 83% Customer Avg.: 71% GAP: 12%

CUSTOMER MANAGEMENT	CATEGORY SCORE: 60%
Clarity of Business Goals Weighting: 10	Portfolio Owner: 83% Customer Avg.: 71% GAP: 12%
Analysis of Requirements Weighting: 5	Portfolio Owner: 83% Customer Avg.: 71% GAP: 12%
Involvement in Testing Weighting: 5	Portfolio Owner: 83% Customer Avg.: 54% GAP: 29%
Leadership in Change Communication Weighting: 7	Portfolio Owner: 83% Customer Avg.: 42% GAP: 41%

CAPACITY	CATEGORY SCORE: 68%
IT as a Bottleneck Weighting: 9	Portfolio Owner: 83% Customer Avg.: 71% GAP: 12%
IT Capacity Weighting: 8	Portfolio Owner: 83% Customer Avg.: 58% GAP: 25%
IT Value Contribution Weighting: 9	Portfolio Owner: 83% Customer Avg.: 75% GAP: 8%

PROJECT CANCELLATION	CATEGORY SCORE: 40%
Avoidance of Cancelled Projects Weighting: 10	Portfolio Owner: 83% Customer Avg.: 42% GAP: 41%
Handling of Cancelled projects Weighting: 8	Portfolio Owner: 83% Customer Avg.: 38% GAP: 45%

ALIGNMENT	CATEGORY SCORE: 71%
Strategic Alignment Weighting: 8	Portfolio Owner: 83% Customer Avg.: 88% GAP: 5%
Alignment with Operational Goals Weighting: 6	Portfolio Owner: 83% Customer Avg.: 50% GAP: 33%

DEPARTMENT SCORE

68%
Compared to all department score of: 64%

PROJECT DELIVERY

Despite the movement towards Agile, customers still think about the three-constraints model of time, cost, and scope.

Project Delivered On Time	Weighting	8
<p>?"Our project are delivered on time."</p> <p>! Project timeliness depends on making sure you get the resources that were allocated.</p>	Strongly disagree	Strongly agree
Port. Owner	[Progress Bar: 5/5]	
Department	[Progress Bar: 5/5]	
ALIGNED		
Projects Delivered On Budget	Weighting	5
<p>?"Our projects are delivered without exceeding the original budget estimate."</p> <p>! Hold to realistic timelines early in the project to contain the people-related costs.</p>	Strongly disagree	Strongly agree
Port. Owner	[Progress Bar: 5/5]	
Department	[Progress Bar: 5/5]	
ALIGNED		
Projects Delivered In Scope	Weighting	9
<p>?"Our projects are delivered within the intended scope of results."</p> <p>! Putting the right processes in place is the key to managing scope in any project management paradigm.</p>	Strongly disagree	Strongly agree
Port. Owner	[Progress Bar: 4/5]	
Department	[Progress Bar: 4/5]	
GAP		

CAPACITY

IT capacity is a fundamental driver of throughput, satisfaction, and value.

IT as a Bottleneck	Weighting	9
<p>?"To what extent is your group constrained by IT from reaching its strategic goals?"</p> <p>! IT services can drive or impede strategic goals.</p>	Very constrained	Very unconstrained
Port. Owner	[Progress Bar: 3/5]	
Department	[Progress Bar: 3/5]	
GAP		
IT Capacity	Weighting	8
<p>?"To what extent are you satisfied with your ability to get IT capacity to complete projects?"</p> <p>! Your analysis should distinguish IT's capacity from their ability to execute.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 2/5]	
Department	[Progress Bar: 2/5]	
GAP		
IT Value Contribution	Weighting	9
<p>?"To what extent are you satisfied with the value IT delivers on completed projects?"</p> <p>! Rather than simply delivering technology services, look to IT for the value they contribute.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 3/5]	
Department	[Progress Bar: 3/5]	
GAP		

CUSTOMER RESPONDENTS — Barry Cousins

PROJECT MANAGEMENT

Effective project delivery revolves around clear communication, prudent prioritization, and realistic expectations. Ensure that your funding goals are properly aligned with the level of resourcing.

Quality	Weighting	8
<p>?"Overall, how satisfied are you with the quality of project results?"</p> <p>! Emphasize quality to keep the projects moving forward.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 5/5]	
Department	[Progress Bar: 5/5]	
ALIGNED		
Communication	Weighting	7
<p>?"Overall, how satisfied are you with the quality of project communications?"</p> <p>! Communication is fundamentally about aligning resources with requirements.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 5/5]	
Department	[Progress Bar: 5/5]	
ALIGNED		
Productivity	Weighting	4
<p>?"Overall, how satisfied are you with the productivity of your project teams?"</p> <p>! Productivity is not about how much you do, it's about what you get done.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 5/5]	
Department	[Progress Bar: 5/5]	
ALIGNED		
Agility	Weighting	6
<p>?"Overall, how satisfied are you with the agility of project teams when the scope, resourcing, or timing of projects needs to change?"</p> <p>! Agility requires timely analysis of the changing requirements to maintain quality and effectiveness.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 4/5]	
Department	[Progress Bar: 4/5]	
GAP		

PROJECT CANCELLATION

Cancelled project costs are the purest form of resource waste.

Avoidance of Cancelled Projects	Weighting	10
<p>?"How satisfied are you that the organization minimizes spending if projects get cancelled before completion?"</p> <p>! Effective project portfolio management limits waste by recognizing projects that shouldn't be started in the first place. This is an essential skill for traditional (i.e. non-Agile) organizations.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 3/5]	
Department	[Progress Bar: 3/5]	
GAP		
Handling of Cancelled projects	Weighting	8
<p>?"How satisfied are you that the organization stops spending time and money as early as possible if projects are cancelled?"</p> <p>! If a project needs to be cancelled, then the sooner the better. This is an essential skill for Agile organizations.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 3/5]	
Department	[Progress Bar: 3/5]	
GAP		

CUSTOMER MANAGEMENT

As more organizations move toward Agile methodologies, customers are becoming increasingly involved throughout the project cycle. Clarifying customer roles, requirements, and expectations is important for project success.

Clarity of Business Goals	Weighting	10
<p>?"How satisfied are you that project goals are clearly stated by the customer and understood by the project teams?"</p> <p>! Project quality suffers when the business goals are unclear or unstable.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 4/5]	
Department	[Progress Bar: 4/5]	
GAP		
Analysis of Requirements	Weighting	5
<p>?"How satisfied are you that the project teams are helping the customer to understand the broader implications of their project requirements?"</p> <p>! The project customer needs to be aware of the broader impact of their requirements to ensure their improvement doesn't cause another area to suffer.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 4/5]	
Department	[Progress Bar: 4/5]	
GAP		
Involvement in Testing	Weighting	5
<p>?"How satisfied are you that the project teams are getting the customers engaged in the appropriate amount of testing and validation of the project deliverables?"</p> <p>! Customer validation needs to ensure quality before changes are made.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 3/5]	
Department	[Progress Bar: 3/5]	
GAP		
Leadership in Change Communication	Weighting	7
<p>?"How satisfied are you that the customer takes the lead in communicating the rationale, timing, and impact of project-related changes?"</p> <p>! Communications are more effective coming from the area that sponsored the project.</p>	Very dissatisfied	Very satisfied
Port. Owner	[Progress Bar: 3/5]	
Department	[Progress Bar: 3/5]	
GAP		

ALIGNMENT

The integrity of your project intake process is measured by Strategic and Operational alignment.

Strategic Alignment	Weighting	8
<p>?"To what extent is your project portfolio aligned with the organization's business strategy?"</p> <p>! Avoid a high-quality focus on the wrong projects.</p>	Not at all aligned	Fully aligned
Port. Owner	[Progress Bar: 4/5]	
Department	[Progress Bar: 4/5]	
GAP		
Alignment with Operational Goals	Weighting	6
<p>?"To what extent is your project portfolio aligned with the organization's operational goals?"</p> <p>! Align the portfolio with operational metrics to avoid causing new problems as you solve the old ones.</p>	Not at all aligned	Fully aligned
Port. Owner	[Progress Bar: 3/5]	
Department	[Progress Bar: 3/5]	
GAP		

Project Portfolio Management

Assessment

Fill out by yourself or with your team.

PREPARED FOR:

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Info-Tech Research Group



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RESEARCH GROUP

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Evaluate PM performance across 5 areas. Determine which areas require improvement and use this report to help you get there.



INSIGHT OVERVIEW

- PPM Administration** (42%)
If the portfolio grows, revisit the potential to centralize administrative support.
- Project Leadership** (79%)
Review your PMO's involvement in project management and PM training to identify opportunities to improve overall portfolio success.
- PPM Governance** (65%)
Your moderate amount of PMO and project governance is not driving overall portfolio success. Consider a deeper commitment to capacity management and portfolio reporting.
- Oversight** (47%)
Look for ways to right-size your PPM practice for a relatively small portfolio.
- Organizational Structure** (50%)
Improve your overall portfolio management success by formalizing the PMO and related staffing levels.



- Project Intake** (64%)
You have a moderate amount of spending on the project intake process already, yet too many projects are being approved. Make sure that the intake process is approving the right amount of the right projects.
- Project Resourcing** (48%)
When you find deficiencies in the portfolio management throughput or satisfaction, look to solve the gap in resourcing. However, add any needed controls and processes to make sure you're not just "throwing resources" at the problem.
- Portfolio Reporting** (62%)
Keep your focus on the currency and quality of your portfolio reporting as you look for improvements in your processes, staffing, and tools.
- Project Closure** (83%)
Recognize the efforts of your project teams as a natural part of the project closure process.



PPM SUCCESS

These scores express your perceptions of overall PPM success. Your answers to these questions inform the recommendations throughout this report.

? "To what extent do you agree with the following statements?"

"Our projects are delivered on time, within budget, and within the intended scope."	67% Project Delivery	"Our project customers are satisfied by the process and results."	75% Customer Satisfaction	"Overall project portfolio spending delivers maximum value based on organizational needs."	63% Portfolio Value
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Insight: A successful PPM practice needs a balance of successful project delivery, satisfied customers, and organizational value. Use the following recommendations to take it to the next level.

Overall Recommendations:

- Ensure that your volume of approved projects and the related PM and PPM processes are supported with sufficient resourcing in both the PMO and the project teams.
- Look for opportunities to evolve the oversight (i.e. use of scorecard for project intake, rec
- Improve the project intake process by making it faster, more repeatable, and more repres
- Focus on improving the content, currency, and delivery of your portfolio reporting.

Assess PM performance across 5 metrics. Determine which metrics you'd like to focus on improving and follow the report to learn how.



TOOLS

The sophistication of project and portfolio management tools needs to line up with the intensity of the data being managed.

Tools in use:



Insight: Internally developed PPM solutions are the primary tool set for two thirds of Info-Tech's Members. Be sure to refine the solution as needed to support your processes and avoid under-funding your own solution.



Portfolio Management Roles

PPM Administration, Project Leadership and PPM Governance

Evaluate the effectiveness of individual PPM areas and sub-areas.
For low scoring areas, follow recommended actions to start improvement efforts



PPM GOVERNANCE - Portfolio governance is essential, but opinions vary on whether that includes project governance.

65%

PROJECT PROGRESS REPORTING

WEIGHTING: 9/10

KEY METRIC

PROJECT PROGRESS

- "How often does your PMO publish current project progress reporting?"
- Perpetually current project progress reporting is a key component of success with PPM.

Recommended Action: Frequently current project portfolio reporting is a critical factor in PPM success.

50% Annually As Required Never Daily

ORGANIZATIONAL CAPACITY MGMT.

WEIGHTING: 10/10

KEY METRIC

- "Our PMO maintains current reporting of organizational capacity for new projects."
- It's essential that people approving projects have a current view of the organization's capacity for more work.

Recommended Action: Check to see if more investment in this information could make the portfolio easier to manage.

67% Strongly Disagree Strongly Agree

PROJECT GOVERNANCE

WEIGHTING: 2/10

- "To what extent does your PMO provide Project Management governance?"
- When the PMO provides Project Management governance, their resources are taxed along with the resources of the project teams. The effort should pay back in process repeatability and reporting consistency across the entire project organization.

54% Not at all Fully

Recommended Action: Since you're concerned about the level of resourcing in the PMO and/or project teams, be sure to address the level of resourcing before getting the PMO more engaged in Project Management governance.

SCHEDULING AND RESOURCING

WEIGHTING: 6/10

- "Our PMO schedules approved projects and assigns resources."
- Most PMOs establish timelines and resourcing plans for projects under their purview.

88% Not at all Fully

Recommended Action: Ensure that the PMO has ample resources to ensure success in this role.

PROJECT LEADERSHIP - Having the PMO provide project managers and/or project management training can be important, but only after the portfolio itself is well managed.

79%

PM RESOURCING

WEIGHTING: 5/10

- "To what extent does your PMO provide staffing of Project Managers to the underlying projects?"
- Deploying PM resources from the PMO can make sense as long as they provide excellent examples of process and governance standards.

96% Not at all Fully

Recommended Action: You indicated a concern about the level of resourcing in the PMO and/or project teams, so be sure to address the level of resourcing before altering the organizational model.

PM TRAINING

WEIGHTING: 5/10

- "To what extent does your PMO provide Project Manager training?"
- When internal processes and tools are unique and proprietary, it's optimal to deliver the related training internally. Otherwise, This function may be better outsourced.

63% Not at all Fully

Recommended Action: You indicated concerns with the level of resourcing in the PMO and/or project teams. Avoid adding more PM training services as a PMO function unless you add more resources. Consider outsourcing existing training if that helps to free up capacity for project delivery.

PPM ADMINISTRATION - It makes sense to centralize some administrative function in the PMO, but only after the strategic role of the PMO is mastered.

42%

PROJECT TIME ACCOUNTING

WEIGHTING: 2/10

- "To what extent does your PMO report on the actual time spent on projects vs. the original estimate?"
- If you're reporting on planned vs. actual time-driven costs, you run the risk that the actual costs are misrepresented in time sheets.

50% Not at all Fully

Recommended Action: Few organizations provide comprehensive reporting on the planned vs. actual time per project because of the difficulty in getting accurate, meaningful time sheet data.

PROJECT TEAM ADMINISTRATIVE SUPPORT

WEIGHTING: 7/10

- "To what extent does your PMO provide administrative support for the project teams?"
- When project team members are mostly focused on project work, it can make sense to centralize administrative support in the PMO.

33% Not at all Fully

Recommended Action: You indicated concerns with the level of resourcing for both the PMO and projects. Look for opportunities to justify more PMO resources by adding administrative support services for the project teams.

PROJECT COST RECONCILIATION

WEIGHTING: 5/10

- "To what extent does your PMO reconcile the overall cost of projects to the original budget, based on a combination of time and capital/expense costs?"
- Reconciliation of project costs can drive a closer attention to detail throughout the life of the project.

42% Not at all Fully

Recommended Action: Review your PPM practice to see if a closer attention to cost accounting can help in the planning and execution of project work.

ADMIN SUPPORT FOR THE STEERING COMMITTEE / PORTFOLIO OWNER

WEIGHTING: 7/10

- "To what extent does your PMO provide administrative support for the Steering Committee?"
- A formalized Steering Committee benefits from administrative support, and the PMO is a natural choice.

50% Not at all Fully

Recommended Action: You indicated concerns with the level of resourcing for the PMO, so avoid taking on further administrative support for the Steering Committee without getting the needed resources.

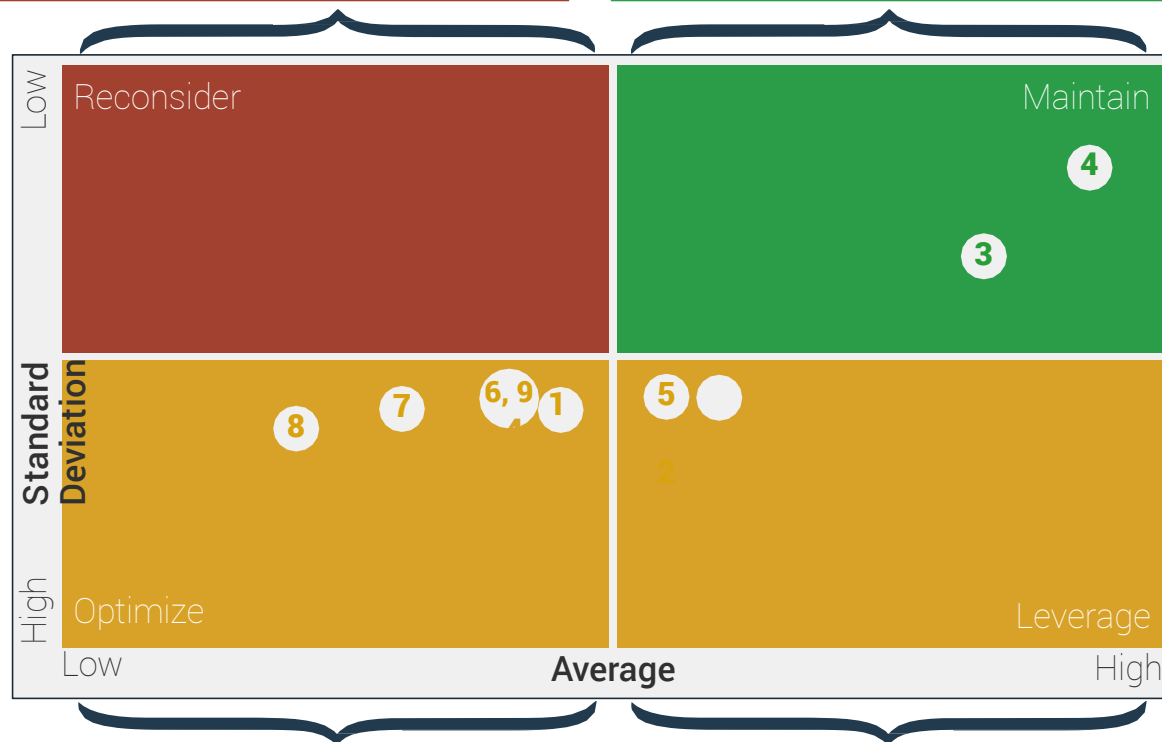


Overview: Project Portfolio Management functions best when all team members are on the same page. This page shows your team's alignment – their relative opinions and degree of consensus – on the various capabilities, procedures, and practices that determine your Portfolio Management Role effectiveness. Use this information to facilitate knowledge transfer, leverage team member insights, address gaps and discrepancies, and optimize your PPM practices.

59%

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Keys to success

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- **Designate a moderator.** Someone needs to structure the discussion and keep it moving. The moderator

Determine whether you and your peers agree on performance. Conduct a team exercise to build alignment and prioritize issues.

1 PPM GOVERNANCE - PROJECT GOVERNANCE					
Top Critics			Top Supporters		
Travis Duncan	3/6	<input type="checkbox"/>	Barry Cousins	5/6	<input type="checkbox"/>
Trevor Bieber	1/6	<input type="checkbox"/>	Matt Burton	4/6	<input type="checkbox"/>
3 PPM GOVERNANCE - SCHEDULING AND RESOURCING					
Top Critics			Top Supporters		
			Barry Cousins	6/6	<input type="checkbox"/>
			Matt Burton	6/6	<input type="checkbox"/>
			Trevor Bieber	5/6	<input type="checkbox"/>
			Travis Duncan	4/6	<input type="checkbox"/>
5 PROJECT LEADERSHIP - PM TRAINING					
Top Critics			Top Supporters		
Trevor Bieber	3/6	<input type="checkbox"/>	Barry Cousins	5/6	<input type="checkbox"/>
Travis Duncan	2/6	<input type="checkbox"/>	Matt Burton	5/6	<input type="checkbox"/>
7 PPM ADMINISTRATION - PROJECT COST RECONCILIATION					
Top Critics			Top Supporters		
Barry Cousins	3/6	<input type="checkbox"/>	Matt Burton	4/6	<input type="checkbox"/>
Travis Duncan	2/6	<input type="checkbox"/>			
Trevor Bieber	1/6	<input type="checkbox"/>			
9 PPM ADMIN - ADMIN SUPPORT FOR STEERING COMMITTEE					
Top Critics			Top Supporters		
Travis Duncan	3/6	<input type="checkbox"/>	Matt Burton	4/6	<input type="checkbox"/>
Barry Cousins	1/6	<input type="checkbox"/>	Trevor Bieber	4/6	<input type="checkbox"/>

2 PPM GOVERNANCE - ORGANIZATIONAL CAPACITY MANAGEMENT					
Top Critics			Top Supporters		
Travis Duncan	2/6	<input type="checkbox"/>	Barry Cousins	6/6	<input type="checkbox"/>
			Matt Burton	4/6	<input type="checkbox"/>
			Trevor Bieber	4/6	<input type="checkbox"/>
4 PROJECT LEADERSHIP - PM RESOURCING					
Top Critics			Top Supporters		
			Barry Cousins	6/6	<input type="checkbox"/>
			Trevor Bieber	6/6	<input type="checkbox"/>
			Travis Duncan	6/6	<input type="checkbox"/>
			Matt Burton	5/6	<input type="checkbox"/>
6 PPM ADMINISTRATION - PROJECT TIME ACCOUNTING					
Top Critics			Top Supporters		
Barry Cousins	2/6	<input type="checkbox"/>	Matt Burton	4/6	<input type="checkbox"/>
Travis Duncan	2/6	<input type="checkbox"/>	Trevor Bieber	4/6	<input type="checkbox"/>
8 PPM ADMINISTRATION - PROJECT TEAM ADMINISTRATIVE SUPPORT					
Top Critics			Top Supporters		
Trevor Bieber	2/6	<input type="checkbox"/>	Matt Burton	4/6	<input type="checkbox"/>
Barry Cousins	1/6	<input type="checkbox"/>			
Travis Duncan	1/6	<input type="checkbox"/>			

Project Portfolio Management

Project Management Assessment



Fill out by yourself or with your team.

PREPARED FOR:

Barry Cousins, Senior Director, PMO Practice
Info-Tech Research Group



Powered by:

INFO~TECH

RESEARCH GROUP

Data is comprised of feedback from 4 respondents, including: Barry Cousins, Matt Burton, Trevor Bieber, Travis Duncan



INSIGHT OVERVIEW

Project Planning

61%

Planning activities vary between Project Management methodologies, but they have the same overall needs.

Key Insight: Inefficiency and poor project results can usually be tracked back to deficiencies in planning. Improve pre-project planning and ensure that a minimal level of clarity and currency is maintained throughout.

Project Resourcing

56%

The quality and quantity of resourcing plays a key role in the project success.

Key Insight: Maintaining a highly effective resourcing strategy is difficult in an era of high turnover and multiple projects. Keep visibility on these issues to ensure that time and talent are sufficient for success.

Project Execution

67%

A high quality project portfolio depends on repeatable processes.

Key Insight: Continue to look for ways to right-size the amount of process rigor in your projects.



Evaluate PM performance across 5 areas. Determine which areas require improvement and use this report to help you get there.

Time Tracking

Organizations tracking staff time need to ensure it's both accurate and valuable.

67%

Key Insight: There are obvious cases where time needs to be tracked for the purpose of re-billing. Beyond that, it's becoming less common to have detailed time tracking for knowledge workers. At a minimum, it's worth distinguishing the actual time spent on projects vs. non-projects to ensure that the high level allocations are realistic for projects, support, operations, ad-hoc, administrative, etc. Organizations need to realistically approve the amount of project work that will be realized (i.e. "Realized Project Capacity").

Reporting

Project reporting drives the ability to manage a portfolio over the long term.

35%

Key Insight: Increase the focus on project portfolio reporting to drive more precise project management.



PM PERCEIVED SUCCESS

These scores express your perceptions of overall project management success. Your answers to these questions inform the recommendations throughout this report.

? "To what extent do you agree with the following statements?"

Our projects are delivered on time, within budget, and within the intended scope.

71%

Project Delivery

Our projects produce high quality results.

88%

Quality

Our project management processes are highly efficient, allowing us to maximize throughput.

63%

Throughput

Our project customers are satisfied by the process and results.

92%

Customer Sat.

The people on our project teams are engaged and satisfied with the process and results.

67%

Staff Sat.

Insight: A successful project management practice needs a balance of successful project delivery, project throughput, satisfied staff, satisfied customers, and quality.
Overall Recommendations: While your resourcing metrics do not generally raise urgent concerns, focus on the recommendations in this report to improve your results.

Assess PM performance across 5 metrics. Determine which metrics you'd like to focus on improving and follow the report to learn how.



TOOLS

The sophistication of project and portfolio management tools needs to line up with the intensity of the data being managed.

Tools in use:

Some tasks not tracked

Manually

Insight: A successful project management practice needs a balance of successful project delivery, project throughput, satisfied staff, satisfied customers, and quality.

Overall Recommendations: Since your task planning is reasonably high level, focus on adopting the simplest task management tool or paradigm possible. It may not even be necessary to expect that every project team uses the same tool.

REPORT OVERVIEW

01

Dashboard

02

Project Planning

03

Project Resourcing

04

Project Execution

05

Reporting and Time Tracking

Evaluate the effectiveness of individual PM areas and sub-areas.
For low scoring areas, follow recommended actions to start improvement efforts



PROJECT PLANNING - Planning activities vary between Project Management methodologies, but they have the same overall needs.

61%
KEY METRIC

PLANNING SUFFICIENCY - WEIGHTING: 10/10



- ❓ "Projects (or sprints, in the case of Agile) are planned sufficiently to get reasonable and realistic expectations of budget, resources, and timelines."
- ❗ Sponsors and stakeholders need to know what they're committing to. For Agile, it's one sprint at a time. Traditionally, planning is harder and more costly.



Recommended Action: Projects need plans for what is being accomplished, who is doing it, when they are doing it, and how much it will cost. Implement a planning process that ensures decision makers have a stronger sense of what they are funding.

KEY METRIC

REQUIREMENTS CURRENCY - WEIGHTING: 10/10



- ❓ "Project requirements are clearly identified up-front, and are maintained on an ongoing basis over the course of the project."
- ❗ Requirements can change, but the need for clarity never gets old.



Recommended Action: Continually ensure requirements clarity at both the project and portfolio level.

KEY METRIC

CHARTER - WEIGHTING: 10/10

- ❓ "There a reasonable Project Charter (or other control document) that is maintained throughout the project."
- ❗ The Charter is essential to getting stakeholder buy-in and avoiding mission creep.



Recommended Action: The Project Charter encourages a minimum level of rigor for projects of all sizes and risk levels. Improve the consistency of your Charter to ensure that projects can be understood and compared by others.

STAKEHOLDER ANALYSIS - WEIGHTING: 8/10

- ❓ "Project stakeholders are identified and an optimal communications plan is in place to address each individual or group."
- ❗ Proactive and deliberate management of stakeholders is critical to smooth change management.



Recommended Action: Determine roles up front, along with the frequency and style of project-related communications for each role.

RE-PLANNING - WEIGHTING: 8/10

- ❓ "Projects are re-planned as needed to maintain the validity of the plan throughout the project."
- ❗ Out of date plans cause irreparable damage to the organization's credibility.



Recommended Action: Ensure that projects are planned at a depth that you're guaranteed to maintain. Plans that don't get maintained add very little value to the organization.

AGILITY - WEIGHTING: 6/10

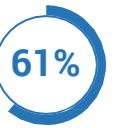
- ❓ "Projects and project teams are flexible and agile (i.e., they react to changes as needed)."
- ❗ Regardless of methodology, projects must be responsive to change.



Recommended Action: Allow timelines and budgets to be re-estimated when scope changes. Then, project teams have no reason to be inflexible.

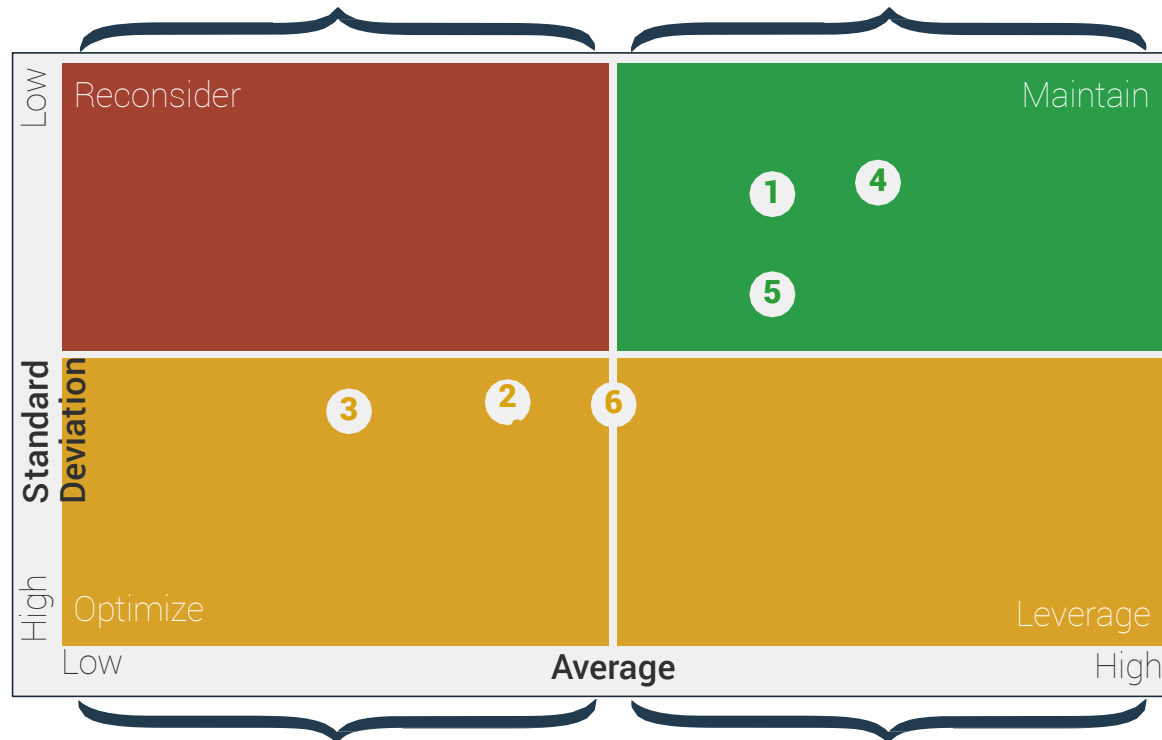


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1 PLANNING SUFFICIENCY			
Top Critics <input type="checkbox"/>		Top Supporters <input type="checkbox"/>	
		Barry Cousins	5/6 <input type="checkbox"/>
		Matt Burton	4/6 <input type="checkbox"/>
		Trevor Bieber	4/6 <input type="checkbox"/>
		Travis Duncan	4/6 <input type="checkbox"/>

2 CHARTER			
Top Critics <input type="checkbox"/>		Top Supporters <input type="checkbox"/>	
Travis Duncan	3/6 <input type="checkbox"/>	Barry Cousins	5/6 <input type="checkbox"/>
Matt Burton	2/6 <input type="checkbox"/>		
Trevor Bieber	2/6 <input type="checkbox"/>		

3 STAKEHOLDER ANALYSIS			
Top Critics <input type="checkbox"/>		Top Supporters <input type="checkbox"/>	
Matt Burton	2/6 <input type="checkbox"/>	Travis Duncan	4/6 <input type="checkbox"/>
Trevor Bieber	2/6 <input type="checkbox"/>		
Barry Cousins	1/6 <input type="checkbox"/>		

4 RE-PLANNING			
Top Critics <input type="checkbox"/>		Top Supporters <input type="checkbox"/>	
		Barry Cousins	5/6 <input type="checkbox"/>
		Trevor Bieber	5/6 <input type="checkbox"/>
		Travis Duncan	5/6 <input type="checkbox"/>
		Matt Burton	4/6 <input type="checkbox"/>

5 AGILITY			
Top Critics <input type="checkbox"/>		Top Supporters <input type="checkbox"/>	
Matt Burton	3/6 <input type="checkbox"/>	Trevor Bieber	5/6 <input type="checkbox"/>
		Travis Duncan	5/6 <input type="checkbox"/>
		Barry Cousins	4/6 <input type="checkbox"/>

6 REQUIREMENTS CURRENCY			
Top Critics <input type="checkbox"/>		Top Supporters <input type="checkbox"/>	
Barry Cousins	2/6 <input type="checkbox"/>	Matt Burton	5/6 <input type="checkbox"/>
Travis Duncan	2/6 <input type="checkbox"/>	Trevor Bieber	5/6 <input type="checkbox"/>

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Use our proven Diagnostocs Program - the simplest way to collect the data you need, turn it into actionable insights, and communicate with stakeholders across the organization.

BUILD A DATA-DRIVEN IT STRATEGY

Use IT assessments to make data-driven IT strategy your most effective weapon.



CIO BUSINESS VISION



CIO-CEO ALIGNMENT DIAGNOSTIC



ASSESS CORE IT PROCESSES



IT STAFFING ASSESSMENT



APPLICATION PORTFOLIO ASSESSMENT



END USER SATISFACTION PROGRAM



PROJECT PORTFOLIO MANAGEMENT DIAGNOSTIC PROGRAM



IT SECURITY DIAGNOSTIC PROGRAM



DATA QUALITY SCORECARD

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