GSDC
Global Skill Development Council

Project Management Office (PMO)

BOK

CERTIFIED PMO PROFESSIONAL CERTIFICATION (BOK)

A comprehensive guide to the knowledge and skills required for PMO professionals

Certified PMOProfessional Book ofKnowledge© Global SkillupCertificationPvt.Ltd.
100D Pasir Panjang RD, #05 - 03 Meissa, Singapore 118520

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1. INTRODUCTION

Thisdocumentprovidesthe body of knowledge (BOK) for the Certified PMO Professional Certification, a credential that validates the competence and credibility of project management office (PMO) professionals. The BOK covers the following topics:

1.1 Purpose of the Body of Knowledge

The purpose of the BOK is to define the scope and content of the certification exam, as well as to provide a reference for the candidates and the examiners. The BOK is based on the current best practices and standards in the field of PMO, as well as the feedback from the PMO practitioners and experts. The BOK is not intended to be a comprehensive or exhaustive source of PMO knowledge, but rather a concise and relevant summary of the essential concepts and skills that a PMO professional should possess.

1.2 Overview of Project Management Office (PMO)

A project management office (PMO) is a group or department within an organization that is responsible for defining, maintaining, and supporting the project management processes, standards, methodologies, tools, and governance. A PMO can have various functions and roles, depending on the organizational context, culture, and strategy. Some of the common functions and roles of a PMO are:

- ¶ Providing project management guidance, training, coaching, and mentoring to the project managers and teams
- ¶ Establishing and enforcing project management policies, procedures, templates, and best practices
- ¶ Facilitating project portfolio management, prioritization, selection, and alignment with the organizational goals and objectives
- ¶ Monitoring and controlling project performance, quality, risks, issues, and changes

- Reporting and communicating project status, progress, benefits, and outcomes to the stakeholders
- Managing project resources, budget, and procurement
- Conducting project audits, reviews, and lessons learned
- Driving project management maturity and continuous improvement

1.3 Certification Goals and Objectives

The goal of the certification is to recognize and certify the PMO professionals who have demonstrated the knowledge and skills required to perform effectively and efficiently in their PMO roles. The objectives of the certification are to:

- Enhance the credibility and recognition of the PMO profession
- Establish a common and consistent standard of PMO competence and excellence
- Promote the adoption and implementation of PMO best practices and standards
- Encourage the professional development and career advancement of PMO professionals
- Improve the quality and success of projects and programs within the organizations

2. FUNDAMENTALS OF PMO

A project management office (PMO) is a group or department within an organization that defines and maintains standards for project management. The PMO provides guidance, support, resources, and oversight to the project managers and teams responsible for delivering projects and programs. The PMO also aligns the strategic objectives of the organization with the execution of its projects and programs.

2.1 History and Evolution of PMO

The concept of PMO emerged in the 1950s, when large-scale projects in the defense and aerospace industries required centralized coordination and control. The PMO was initially seen as a bureaucratic function that imposed rules and procedures on the project managers and teams. However, over time, the PMO evolved to become a more agile and flexible entity that adapts to the changing needs and expectations of the organization and its stakeholders. The PMO also expanded its scope and influence to cover not only individual projects, but also portfolios and programs of interrelated projects. Some of the factors that contributed to the evolution of PMO are:

- The increasing complexity and uncertainty of the project environment, which demanded more effective planning, monitoring, and controlling of the project activities and outcomes.
- The growing recognition of the strategic value and competitive advantage of project management, which required more alignment and integration of the project objectives and deliverables with the organizational vision and mission.

- The emergence of new project management methodologies and standards, such as agile, lean, and PMBOK, which offered more guidance and best practices for the project management processes and practices.
- The development of new technologies and tools, such as software, cloud, and artificial intelligence, which enabled more collaboration and communication among the project stakeholders and enhanced the efficiency and quality of the project outputs.

2.2 Types of PMOs

There is no one-size-fits-all model for PMOs, as different organizations may have different goals, structures, cultures, and levels of maturity. However, based on the degree of authority and involvement in the project management processes, three common types of PMOs can be identified:

2.2.1 Supportive PMO:

¶This type of PMO provides consultative services and assistance to the project managers and teams, such as templates, tools, best practices, training, and mentoring. The supportive PMO has a low level of control and influence, and acts as a facilitator and advisor. The supportive PMO is suitable for organizations that have a decentralized and flexible project management approach, and where the project managers and teams have a high level of autonomy and responsibility. Some of the benefits of the supportive PMO are:

¶It allows the project managers and teams to choose the most appropriate project management methods and techniques for their specific projects and contexts.

¶It fosters a culture of learning and innovation among the project managers and teams, as they can access and share the knowledge and experience of the PMO and other project stakeholders.

¶It reduces the administrative and operational burden on the project managers and teams, as they can rely on the PMO for providing the necessary resources and support for their project activities.

2.2.2 Controlling PMO:

¶ This type of PMO provides more direct oversight and governance to the project managers and teams, such as monitoring, auditing, reporting, and compliance. The controlling PMO has a moderate level of control and influence, and acts as a regulator and coordinator. The controlling PMO is suitable for organizations that have a standardized and consistent project management approach, and where the project managers and teams have to follow certain guidelines and methodologies. Some of the benefits of the controlling PMO are:

¶ It ensures the quality and consistency of the project management processes and practices across the organization, as it enforces the adherence to the established standards and procedures.

¶ It enhances the visibility and transparency of the project performance and progress, as it collects and analyzes the project data and information and reports the results and outcomes to the relevant stakeholders.

¶ It improves the accountability and responsibility of the project managers and teams, as it evaluates and reviews their project activities and deliverables and provides feedback and recommendations for improvement.

2.2.3 Directive PMO:

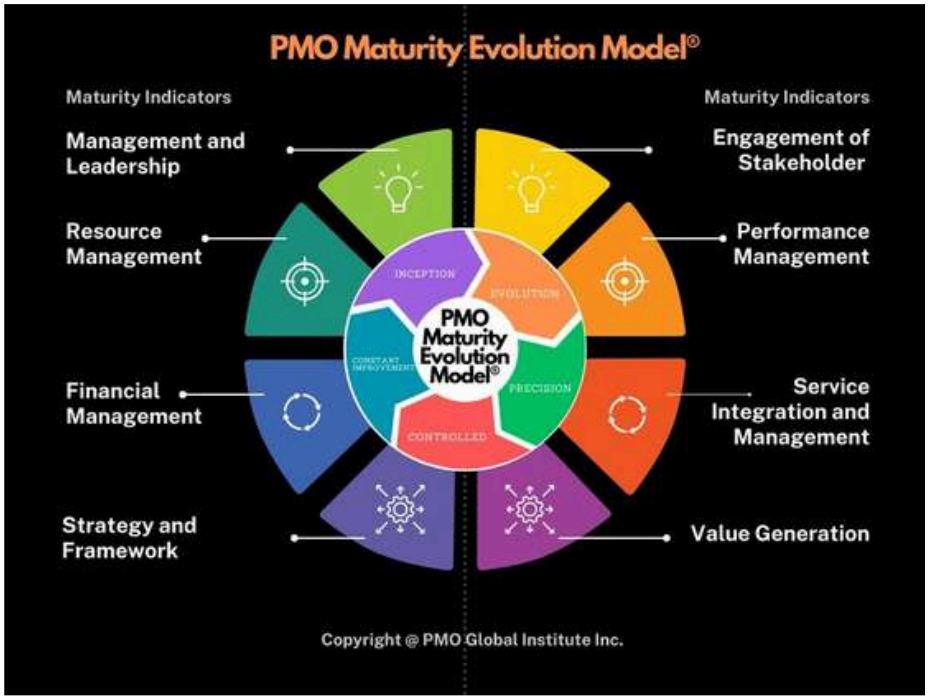
¶ This type of PMO provides the most intensive and comprehensive support and direction to the project managers and teams, such as managing, leading, and executing the projects and programs. The directive PMO has a high level of control and influence, and acts as a manager and leader. The directive PMO is suitable for organizations that have a centralized and integrated project management approach, and where the project managers and teams have a low level of autonomy and responsibility. Some of the benefits of the directive PMO are:

¶ It ensures the alignment and integration of the project objectives and deliverables with the organizational strategy and goals, as it defines and prioritizes the projects and programs based on the organizational needs and expectations.

¶ It maximizes the efficiency and effectiveness of the project resources and processes, as it allocates and optimizes the project budget, schedule, scope, and quality according to the project requirements and constraints.

¶ It minimizes the risks and uncertainties of the project outcomes, as it identifies and mitigates the potential issues and challenges that may affect the project success and stakeholder satisfaction.

2.3 PMO Frameworks and Models



Besides the types of PMOs> based on the degree of authority and involvement, there are also various frameworks and models that describe the functions and roles of PMOs within the organization. Some of the common frameworks and models are:

¶**PMO Maturity Model:** This model assesses the level of maturity and effectiveness of the PMO in terms of five stages: initial, repeatable, defined, managed, and optimized. The model helps the PMO to identify its strengths and weaknesses, and to plan for improvement and innovation. Some of the characteristics and activities of each stage are:

¶**Initial:** The PMO is newly established or informal, and has limited or unclear functions and roles. The PMO provides basic support and guidance to the project managers and teams, and has little or no influence on the project management processes and practices. The PMO has no defined goals or metrics, and does not measure or communicate its value and impact.

¶**Repeatable:** The PMO is more structured and organized, and has defined functions and roles. The PMO provides more consistent and standardized

support and guidance to the project managers and teams, and has some influence on the project management processes and practices. The PMO has some goals and metrics, and measures and communicates its value and impact to some extent. **Defined:** The PMO is more mature and professional, and has documented functions and roles. The PMO provides more comprehensive and customized support and guidance to the project managers and teams, and has significant influence on the project management processes and practices. The PMO has clear and realistic goals and metrics, and measures and communicates its value and impact effectively.

- **Managed:** The PMO is more proactive and strategic, and has aligned functions and roles. The PMO provides more integrated and collaborative support and guidance to the project managers and teams, and has substantial influence on the project management processes and practices. The PMO has SMART (specific, measurable, achievable, relevant, and time-bound) goals and metrics, and measures and communicates its value and impact efficiently.
- **Optimized:** The PMO is more innovative and adaptive, and has optimized functions and roles. The PMO provides more dynamic and flexible support and guidance to the project managers and teams, and has full influence on the project management processes and practices. The PMO has SMARTER (specific, measurable, achievable, relevant, time-bound, evaluated, and reviewed) goals and metrics, and measures and communicates its value and impact continuously.
- **PMO Value Ring:** This model defines the value proposition and the key performance indicators (KPIs) of the PMO based on eight steps: define stakeholders, define PMO functions, define PMO processes, define PMO performance, establish PMO value, monitor PMO value, evaluate PMO value, and increase PMO value. The model helps the PMO to measure and communicate its value and impact to the organization and its stakeholders. Some of the activities and outcomes of each step are:
- **Define stakeholders:** The PMO identifies and prioritizes the internal and external stakeholders who have an interest or influence on the PMO and its functions and roles. The PMO also determines the expectations and needs of each stakeholder group, and the level of satisfaction and engagement they have with the PMO.

- **Define PMO functions:** The PMO defines and categorizes the functions and services that it provides to the project managers and teams and the organization as a whole. The PMO also evaluates the importance and feasibility of each function and service, and the level of alignment and integration they have with the organizational strategy and goals. **Define PMO processes:** The PMO defines and documents the processes and procedures that it follows to perform its functions and services. The PMO also assesses the efficiency and effectiveness of each process and procedure, and the level of compliance and consistency they have with the project management standards and methodologies. **Define PMO performance:** The PMO defines and selects the KPIs that it uses to measure and monitor its performance and results. The PMO also establishes the targets and benchmarks for each KPI, and the level of alignment and integration they have with the stakeholder expectations and needs. **Establish PMO value:** The PMO calculates and quantifies the value and impact that it generates and delivers to the organization and its stakeholders. The PMO also identifies and communicates the benefits and outcomes that it produces and contributes to the organizational performance and results. **Monitor PMO value:** The PMO collects and analyzes the data and information that reflect its value and impact. The PMO also tracks and reports the progress and achievements that it makes and demonstrates to the organization and its stakeholders. **Evaluate PMO value:** The PMO compares and evaluates its value and impact against its targets and benchmarks. The PMO also solicits and receives the feedback and opinions of the organization and its stakeholders on its value and impact.

  Increase PMO value: The PMO identifies and implements the actions and initiatives that can improve and enhance its value and impact. The PMO also reviews and updates its functions and roles, processes and procedures, performance and results, and value and impact according to the changing needs and expectations of the organization and its stakeholders.

  PMO Cube: This model categorizes the PMOs based on three dimensions: organizational level (strategic, tactical, or operational), organizational structure (centralized, decentralized, or hybrid), and PMO role (supporting,

controlling, or directing). The model helps the PMO to understand and align its position and function within the organization. Some of the characteristics and implications of each dimension are: **Organizational level:** This dimension indicates the level of hierarchy and scope of the PMO within the organization. The strategic level PMO focuses on the long-term vision and goals of the organization, and oversees the portfolios and programs of interrelated projects. The tactical level PMO focuses on the medium-term objectives and plans of the organization, and manages the individual projects and their deliverables. The operational level PMO focuses on the short-term activities and tasks of the organization, and supports the project managers and teams and their processes and practices.

- **Organizational structure:** This dimension indicates the level of centralization and decentralization of the PMO within the organization. The centralized PMO is a single and unified entity that serves the entire organization and all its projects and programs. The decentralized PMO is a multiple and dispersed entity that serves specific business units or functions and their projects and programs. The hybrid PMO is a combination of both centralized and decentralized PMOs, and serves different levels and areas of the organization and their projects and programs.
- **PMO role:** This dimension indicates the level of authority and involvement of the PMO in the project management processes and practices. The supporting PMO provides consultative services and assistance to the project managers and teams, and has a low level of control and influence. The controlling PMO provides more direct oversight and governance to the project managers and teams, and has a moderate level of control and influence. The directive PMO provides the most intensive and comprehensive support and direction to the project managers and teams, and has a high level of control and influence.

3. PMO ROLES AND RESPONSIBILITIES

In this section, we will describe the typical roles and responsibilities of the PMO professionals, as well as the skills and competencies they needto perform their functions effectively.

3.1 PMO Structure and Governance

The PMO structure and governance refer to the way the PMO is organized and aligned with the organizational strategy, culture, and objectives. The PMO structure and governance also define the roles and responsibilities of the PMO staff and stakeholders, the reporting and communication lines, the decision-making and escalation processes, and the performance measurement and evaluation criteria. The PMO structure and governance should be flexible and adaptable to the changing needs and demands of the organization and its projects and programs.

3.2 Key Roles in PMO

The key roles in the PMO are the PMO director, the PMO manager, and the project managers. These roles may vary depending on the size, scope, and complexity of the PMO and the organization, and may have different titles and functions in different contexts. However, the general roles and responsibilities of these positions are as follows:

3.2.1 PMO Director

The PMO director is the senior executive who leads and oversees the PMO and its strategic alignment with the organizational vision and goals. The PMO director is responsible for:

- Establishing the PMO vision, mission, values, and objectives
- Developing and implementing the PMO strategy, policies, standards, and best practices
- Securing and allocating the PMO resources, budget, and funding
- Building and maintaining the PMO stakeholder relationships and engagement
- Advocating and promoting the PMO value proposition and benefits
- Ensuring the PMO compliance with the organizational and external regulations and requirements
- Monitoring and evaluating the PMO performance and outcomes
- Providing guidance and direction to the PMO manager and staff
- Resolving the PMO issues and challenges at the strategic level

3.2.2 PMO Manager

The PMO manager is the key person who manages and coordinates the PMO operations and activities. The PMO manager is responsible for:

- Planning and executing the PMO projects, programs, and portfolios
- Managing and supervising the PMO staff and project managers
- Providing support and assistance to the project managers and teams
- Implementing and enforcing the PMO policies, standards, and best practices
- Reporting and communicating the PMO status and progress to the PMO director and stakeholders
- Identifying and managing the PMO risks and issues
- Conducting and facilitating the PMO reviews and audits
- Improving and enhancing the PMO processes and practices
- Resolving the PMO issues and challenges at the operational level

3.2.3 Project Managers

The project managers are the PMO professionals who plan and execute the individual projects within the PMO scope and framework. The project managers are responsible for:

- Initiating and defining> the project scope, objectives, deliverables, and stakeholders
- Planning and scheduling the project activities, tasks, resources, and budget
- Executing and controlling the project work, quality, and changes

- Monitoring and tracking the project performance and progress
- Reporting and communicating the project status and results to the PMO manager and stakeholders
- Closing and handing over the project outputs and outcomes
- Identifying and managing the project risks and issues
- Applying and following the PMO policies, standards, and best practices
- Resolving the project issues and challenges at the tactical level

3.3 Skills and Competencies for PMO Professionals

The PMO professionals need to have a range of skills and competencies to perform their roles and responsibilities effectively and efficiently. These skills and competencies can be classified into three categories: technical, behavioral, and contextual.

Technical skills and competencies are the knowledge and abilities related to the specific project management tools, techniques, and methodologies. These include:

- Project management frameworks and standards, such as PMBOK, PRINCE2, or Agile
- Project management software and applications, such as Microsoft Project, Jira, or Trello
- Project management processes and practices, such as project initiation, planning, execution, monitoring, and closure
- Project management knowledge areas, such as scope, time, cost, quality, risk, communication, and stakeholder management

Behavioral skills and competencies are the personal and interpersonal attributes and behaviors that enable the PMO professionals to work effectively with others and cope with the challenges and uncertainties of the project environment. These include:

- Leadership and management skills, such as vision, strategy, motivation, delegation, and feedback
- Communication and collaboration skills, such as listening, speaking, writing, presenting, and negotiating
- Teamwork and relationship skills, such as trust, respect, diversity, and conflict resolution

- ¶ Problem-solving and decision-making skills, such as analysis, creativity, logic, and judgment
- ¶ Self-management and resilience skills, such as adaptability, flexibility, initiative, and stress management

Contextual skills and competencies are the understanding and awareness of the organizational and environmental factors and influences that affect the PMO and its projects and programs. These include:

- ¶ Organizational culture and values, such as vision, mission, goals, and ethics
- ¶ Organizational structure and governance, such as hierarchy, authority, and accountability
- ¶ Organizational strategy and alignment, such as objectives, priorities, and plans
- ¶ Organizational stakeholders and expectations, such as needs, interests, and power
- ¶ External environment and trends, such as market, industry, technology, and regulation

4. PROJECT MANAGEMENT METHODOLOGIES

4.1 Traditional Project Management

Traditional project management is a linear and sequential approach that follows a predefined plan and scope. It is based on the assumption that the project requirements are clear and stable, and that changes are minimal or costly. Traditional project management focuses on delivering a high-quality product that meets the customer's expectations and specifications. Some of the advantages of traditional project management are:

- ¶ It provides a clear and detailed roadmap for the project, with defined milestones and deliverables.
- ¶ It facilitates the coordination and communication among the project stakeholders, as everyone knows their roles and responsibilities.
- ¶ It ensures the quality and reliability of the product, as it undergoes rigorous testing and verification.

Some of the disadvantages of traditional project management are:

- ¶ It is rigid and inflexible, as it does not accommodate changes or uncertainties in the project environment.
- ¶ It is slow and inefficient, as it requires a lot of documentation and approval processes.
- ¶ It is customer-centric, as it does not involve the customer in the project development or feedback loops.

4.1.1 Waterfall Methodology

The waterfall methodology is one of the most widely used traditional project management methods. It divides the project into distinct phases, such as initiation, analysis, design, implementation, testing, and deployment. Each phase is completed before moving on to the next one, and there is no going back to a previous phase unless a major problem arises. The waterfall methodology is suitable for projects that have well-defined and fixed requirements, and that do not need frequent feedback or iterations. Some of the advantages of the waterfall methodology are:

- ¶It simplifies the project management process, as each phase has a clear start and end point.

- ¶ It reduces the risk of errors and defects, as each phase is thoroughly reviewed and tested before proceeding to the next one.
- ¶ It facilitates the measurement and control of the project progress, as each phase has specific deliverables and criteria.

Some of the disadvantages of the waterfall methodology are:

- ¶ It is unrealistic and impractical, as it assumes that the project requirements are static and predictable.
- ¶ It is wasteful and costly, as it does not allow for changes or improvements in the project scope or design.
- ¶ It is customer-unfriendly, as it does not incorporate the customer's feedback or satisfaction until the end of the project.

4.1.2 Critical Path Method (CPM)

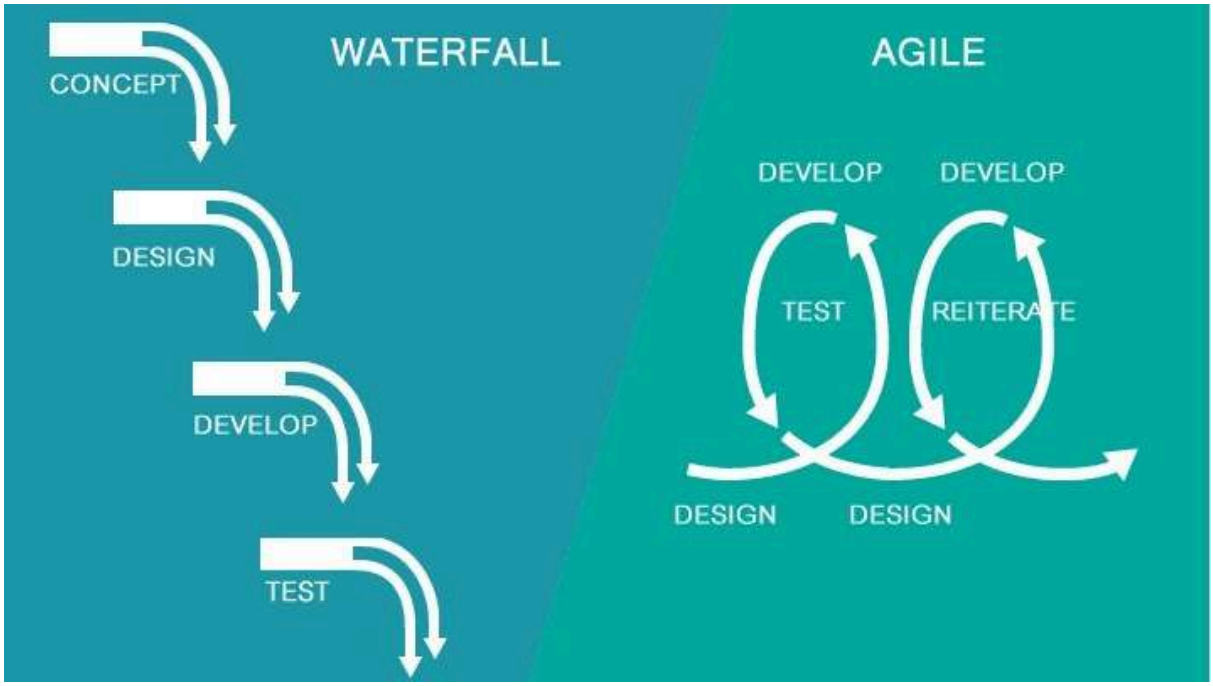
The critical path method (CPM) is a technique for scheduling and managing complex projects. It identifies the longest sequence of activities that must be completed on time to finish the project, known as the critical path. It also calculates the earliest and latest start and finish dates for each activity, and the amount of slack or float available for each activity. The CPM helps project managers to optimize the use of resources, avoid delays, and monitor the project progress. Some of the advantages of the CPM are:

- ¶ It provides a comprehensive and realistic view of the project schedule, as it considers the dependencies and constraints among the activities.
- ¶ It identifies the critical activities and the critical path, which are the most important for the project success and completion.
- ¶ It enables the project managers to prioritize and allocate the resources, as well as to identify and manage the risks and uncertainties.

Some of the disadvantages of the CPM are:

- ¶ It is complex and time-consuming, as it requires a lot of data collection and analysis.
- ¶ It is sensitive and volatile, as it depends on the accuracy and reliability of the estimates and assumptions.
- ¶ It is static and inflexible, as it does not reflect the changes or variations in the project environment or conditions.

4.2 Agile Project Management



Agile project management is an iterative and adaptive approach that responds to changing customer needs and expectations. It is based on the principle that the project requirements are dynamic and evolving, and that changes are welcome and beneficial. Agile project management focuses on delivering a high-value product that satisfies the customer's feedback and preferences. Some of the advantages of agile project management are:

- ¶ It is flexible and responsive, as it allows for changes and adjustments in the project scope or design.
- ¶ It is fast and efficient, as it delivers the product in small and frequent increments.
- ¶ It is customer-oriented, as it involves the customer in the project development and feedback loops.

Some of the disadvantages of agile project management are:

- ¶ It is vague and uncertain, as it does not provide a clear and detailed plan or scope for the project.
- ¶ It is risky and unstable, as it depends on the collaboration and communication among the project stakeholders.

¶ It is challenging and demanding, as it requires a high level of skill and commitment from the project team.

4.2.1 Scrum

Scrum is one of the most popular agile project management frameworks. It organizes the project into short cycles of work, called sprints, that typically last from one to four weeks. Each sprint produces a potentially shippable product increment that meets the customer's priorities and quality standards. Scrum involves three main roles: the product owner, who represents the customer and defines the product vision and backlog; the scrum master, who facilitates the scrum process and removes impediments; and the development team, who self-organizes and delivers the product increment. Some of the advantages of scrum are:

¶ It is simple and transparent, as it uses a common language and a common framework for the project.
¶ It is empirical and adaptive, as it relies on the inspection and adaptation of the product and the process.
¶ It is empowering and motivating, as it gives the autonomy and responsibility to the project team.

Some of the disadvantages of scrum are:

¶ It is demanding and intensive, as it requires a high level of involvement and dedication from the project stakeholders.
¶ It is dependent and reliant, as it depends on the availability and suitability of the product owner and the scrum master.
¶ It is limited and constrained, as it may not be applicable or appropriate for some types of projects or environments.

4.2.2 Kanban

Kanban is another agile project management framework that emphasizes continuous flow and improvement. It visualizes the project workflow using a board with columns that represent different stages of the process, such as to-do, in progress, and done. Each work item is represented by a card that moves from one column to another as it progresses. Kanban limits the number of work items that can be in each column at any given time, known as the work in progress (WIP) limit. Kanban helps project teams to optimize the efficiency, quality, and delivery of their work. Some of the advantages of kanban are:

- ¶ It is visual and intuitive, as it provides a clear and easy-to-understand representation of the project status and progress.
- ¶ It is evolutionary and incremental, as it encourages the continuous improvement and optimization of the process and the product.
- ¶ It is flexible and adaptable, as it allows for changes and variations in the project priorities and demands.

Some of the disadvantages of kanban are:

- ¶ It is abstract and ambiguous, as it does not specify the roles and responsibilities of the project stakeholders.
- ¶ It is passive and reactive, as it does not prescribe the planning and execution of the project.
- ¶ It is challenging and complex, as it requires a high level of coordination and collaboration among the project team.

4.3 Hybrid Approaches

Hybrid approaches combine elements of both traditional and agile project management methods to suit the specific needs and characteristics of each project. They aim to balance the benefits of planning, control, and predictability with those of flexibility, responsiveness, and creativity. Some examples of hybrid approaches are:

4.3.1 Water-scrum-fall

Water-scrum-fall is a hybrid approach that uses the waterfall methodology for the initial and final phases of the project, and the scrum framework for the intermediate phases. It combines the advantages of both methods, such as:

- ¶ It provides a clear and comprehensive plan and scope for the project, as well as a flexible and iterative development and delivery process.
- ¶ It ensures the quality and reliability of the product, as well as the customer satisfaction and feedback.
- ¶ It facilitates the coordination and communication among the project stakeholders, as well as the empowerment and motivation of the project team.

It also mitigates the disadvantages of both methods, such as:

- ¶It avoids the rigidity and inflexibility of the waterfall methodology, as well as the uncertainty and instability of the scrum framework.

- ¶ It reduces the waste and cost of the waterfall methodology, as well as the risk and complexity of the scrum framework.
- ¶ It balances the customer-centricity and the team-centricity of the project, as well as the control and the creativity of the project management.

4.3.2 AgilePM

AgilePM is a hybrid approach that follows the principles and practices of agile project management, but also provides a clear structure and governance for the project. It is based on the DSDM (Dynamic Systems Development Method) framework, which is one of the oldest and most comprehensive agile methods. It defines eight principles for agile project management, such as:

- ¶ Focus on the business need
- ¶ Deliver on time
- ¶ Collaborate
- ¶ Never compromise quality
- ¶ Build incrementally from firm foundations
- ¶ Develop iteratively
- ¶ Communicate continuously and clearly
- ¶ Demonstrate control

It also provides a process model that consists of four stages, such as:

- ¶ Pre-project: where the project feasibility and viability are assessed and agreed.
- ¶ Foundation: where the project scope, objectives, and requirements are defined and prioritized.
- ¶ Evolutionary development: where the project solution is developed and delivered in iterations.
- ¶ Deployment: where the project solution is tested, verified, and deployed.

4.3.3 PRINCE2 Agile

PRINCE2 Agile is a hybrid approach that integrates the PRINCE2 methodology, which is a widely used traditional project management method, with the agile way of working. It combines the best of both worlds, such as:

- ¶ It provides a structured and disciplined framework for the project, as well as an agile and flexible mindset for the project team.

- ¶ It ensures the alignment and accountability of the project with the business objectives and the customer expectations.
- ¶ It enables the delivery and management of the project in an iterative and incremental manner, with frequent feedback and adaptation.

It also offers a guidance and a toolkit for applying the PRINCE2 principles, themes, and processes in an agile context, such as:

- ¶ It tailors the PRINCE2 principles to the agile environment, such as by emphasizing the customer focus and the empowerment of the team.
- ¶ It adapts the PRINCE2 themes to the agile situation, such as by using the agile behaviors and concepts for the project roles, plans, risks, quality, and change.
- ¶ It modifies the PRINCE2 processes to the agile delivery, such as by integrating the agile practices and techniques for the project initiation, direction, control, and closure.

It also aligns the PRINCE2 agile approach with the organizational strategy, by providing guidance on how to manage projects in a way that supports the strategic objectives and delivers value to the stakeholders.

5. STRATEGIC ALIGNMENT

5.1AligningProjectswithOrganizational Strategy

- Projectsare not isolated endeavors, but rather part of a larger context of the organization's vision, mission, goals, and values. Therefore, projects should be aligned with the organizational strategy, which defines the direction, scope, and priorities of the organization in the long term.
- Aligning projects with the organizational strategy ensures that the projects are relevant, beneficial, and feasible, and that they contribute to the achievement of the desired outcomes and outputs.
- To align projects with the organizational strategy, the following steps are recommended: Conduct a strategic analysis to understand the external and internal factors that affect the organization and its environment, such as the PESTLE (political, economic, social, technological, legal, and environmental) analysis, the SWOT (strengths, weaknesses, opportunities, and threats) analysis, or the stakeholder analysis. Define the strategic objectives and measures that express the desired results and performance of the organization, such as the balanced scorecard, the OKRs (objectives and key results), or the KPIs (key performance indicators). Identify and prioritize the strategic initiatives and projects that will enable the organization to achieve its strategic objectives and measures, such as the MoSCoW (must have, should have, could have, won't have) prioritization, the cost-benefit analysis, or the business case.
- Establish the governance and oversight mechanisms that will ensure the alignment and coordination of the projects with the organizational strategy, such as the project board, the steering committee, the project management office, or the portfoliomanagement.

5.2 Portfolio Management

- Portfoliomanagement is the coordinated management of a collection of projects and programs that are grouped together to facilitate the effective delivery of the organizational strategy and objectives. Portfolio management helps the organization to optimize the allocation and utilization of its resources, to balance the risks and benefits of its investments, and to monitor and evaluate the performance and value of its projects and programs.
- Portfolio management involves the following processes:

- Define the portfolio, which involves identifying, categorizing, and prioritizing the projects and programs that are aligned with the organizational strategy and objectives, and establishing the portfolio vision, scope, and boundaries. Manage
- the portfolio, which involves planning, executing, controlling, and closing the projects and programs in the portfolio, and ensuring the alignment, integration, and coordination of their delivery and dependencies. Review the portfolio, which
- involves monitoring, evaluating, and reporting the progress, performance, and value of the projects and programs in the portfolio, and identifying and implementing the necessary changes and improvements.

5.3 Benefits Realization Management

- Benefits realization management is the process of identifying, planning, managing, and measuring the benefits that> are expected to be delivered by the projects and programs in the portfolio. Benefits realization management helps the organization
- to ensure that the projects and programs are focused on delivering value to the stakeholders, and that the benefits are realized and sustained in the long term. Benefits realization
- management involves the following steps: Identify the benefits, which involves
- analyzing the needs and expectations of the stakeholders, defining the desired outcomes and outputs of the projects and programs, and specifying the benefits and their attributes, such as the type, source, owner, and value of the benefits.
- Plan the benefits, which involves developing a benefits realization plan that describes how the benefits will be delivered, tracked, and measured, and what resources, activities, and responsibilities are involved in the benefits realization process.
- Manage the benefits, which involves implementing, managing, and controlling the benefits realization plan, and ensuring that the benefits are aligned with the project and program delivery and the organizational strategy and objectives.
- Measure the benefits, which involves collecting, analyzing, and reporting the data and evidence that demonstrate the achievement and impact of the benefits, and evaluating the success and value of the projects and programs.

6. PMO PROCESSES AND TOOLS

APMO needsto have effective processesand tools to manage the projects and programs in the organization. These processes and tools help the PMO to align the projects and programs with the organizational strategy and objectives, deliver the benefits and value to the customers and stakeholders, and ensure the quality and ethics of the project and program outcomes. The main processes and tools that a PMO needs to focus on are project governance and compliance, risk management, resource management, and project management software and collaboration tools.

6.1 Project Governance and Compliance

Project governance and compliance are the rules and guidelines that govern how projects and programs are initiated, planned, executed, monitored, controlled, and closed in the organization. Project governance and compliance also ensure that the projects and programs follow the relevant internal and external regulations, standards, and best practices. Project governance and compliance are essential for the PMO to maintain the consistency, quality, and accountability of the project and program delivery and outcomes.

The PMO is responsible for developing and maintaining the project governance and compliance framework, methodology, and standards for the organization. The PMO also performs the following functions and tasks related to project governance and compliance:

- ¶It sets and enforces the criteria and processes for selecting, approving, and prioritizing the projects and programs that align with the organizational strategy and objectives.
- ¶It provides guidance, support, and oversight to the project and program managers and teams in following the project management framework, methodology, and standards.
- ¶ It conducts project audits, reviews, and evaluations to measure and assess the performance, quality, and risks of the projects and programs.
- ¶ It reports and escalates the project and program issues, changes, and status to the senior management and stakeholders, and facilitates the decision-making and problem-solving processes.
- ¶It facilitates the communication, coordination, and collaboration among the project and program stakeholders, and ensures that the project and program

deliverables and outcomes meet the customer and stakeholder expectations and requirements. It manages the project and program documentation and

¶ records, and
ensures that they are complete, accurate, and up-to-date.

¶ It promotes the project management culture, knowledge, and competencies in the organization, and provides training and mentoring to the project and program managers and teams.

6.2 Risk Management

Risk management is the process of identifying, analyzing, evaluating, treating, monitoring, and controlling the uncertainties and threats that may affect the project and program objectives, deliverables, benefits, and value. Risk management helps the PMO to anticipate and mitigate the potential problems and issues that may occur during the project and program life cycle, and to seize the opportunities that may improve the project and program performance and outcomes. Risk management is crucial for the PMO to manage the uncertainty and complexity of the projects and programs, and to ensure the success and sustainability of the project and program outcomes.

The PMO is responsible for developing and maintaining the risk management framework, methodology, and standards for the organization. The PMO also performs the following functions and tasks related to risk management:

¶It identifies and assesses the strategic, portfolio, program, and project risks at the organizational level, and evaluates the impact and probability of the risks.

¶It provides guidance, support, and oversight to the project and program managers and teams in identifying and assessing the operational, technical, and business risks at the project and program level, and evaluates the impact and probability of the risks.

¶ It develops and implements the risk response strategies and plans for the identified risks, and assigns the risk owners and actions.

¶ It monitors and reviews the risk status and performance, and updates the risk register and reports, and ensures that the risk response actions are executed and effective.

- It reports and escalates the risk issues, changes, and status to the senior management and stakeholders, and facilitates the decision-making and problem-solving processes. It facilitates the communication,
- coordination, and collaboration among the project and program stakeholders regarding the risk management activities and outcomes, and ensures that the risks are managed and controlled. It
- manages the risk management documentation and records, and ensures that they are complete, accurate, and up-to-date. It promotes the risk
- management culture, knowledge, and competencies in the organization, and provides training and mentoring to the project and program managers and teams.

6.3 Resource Management

Resource management is the process of planning, allocating, utilizing, and optimizing the resources that are required for the successful delivery of the projects and programs. Resources include human resources (such as staff, contractors, consultants, and volunteers), physical resources (such as equipment, materials, and facilities), financial resources (such as budget, funding, and revenue), and intangible resources (such as time, information, and knowledge). Resource management helps the PMO to ensure that the projects and programs have sufficient and appropriate resources to achieve the project and program objectives, deliverables, benefits, and value, and to manage the resource constraints and challenges.

The PMO is responsible for developing and maintaining the resource management framework, methodology, and standards for the organization. The PMO also performs the following functions and tasks related to resource management:

- It identifies and estimates the resource requirements and availability for the projects and programs, and considers the resource dependencies and interdependencies.
- It allocates and assigns the resources to the projects and programs based on the priority, demand, and capacity, and balances the resource distribution and allocation.
- It monitors and controls the resource utilization and performance, and resolves the resource conflicts and issues, and ensures that the resources are used efficiently and effectively.

- It optimizes the resource efficiency and effectiveness, and maximizes the resource value and return on investment, and ensures that the resources are aligned with the project and program outcomes. It reports and
- escalates the resource issues, changes, and status to the senior management and stakeholders, and facilitates the decision-making and problem-solving processes. It facilitates the communication, coordination,
- and collaboration among the project and program stakeholders regarding the resource management activities and outcomes, and ensures that the resources are managed and optimized. It manages the resource management documentation and records, and
- ensures that they are complete, accurate, and up-to-date. It promotes the resource management culture, knowledge, and
- competencies in the organization, and provides training and mentoring to the project and program managers and teams.

6.4 Tools and Software for PMO

Tools and software for PMO are the applications and systems that assist the PMO in performing the project and program management functions and tasks. Tools and software for PMO can help the PMO to improve the efficiency, effectiveness, and quality of the project and program delivery and outcomes, and to facilitate the communication, coordination, and collaboration among the project and program stakeholders. Tools and software for PMO can also help the PMO to automate and streamline some of the project and program management processes and tasks, and to integrate and consolidate the project and program information and data.

Some of the common tools and software for PMO are:

6.4.1 Project Management Software

Project management software is a tool that helps the PMO to plan, execute, monitor, control, and close the projects and programs. Project management software can provide various features and functionalities, such as:

- Project scheduling and tracking, such as creating and updating the project and program plans, timelines, milestones, and deliverables, and tracking the progress and status of the project and program activities and tasks.

- Project budgeting and costing, such as estimating and managing the project and program costs, revenues, and expenses, and tracking the variance and deviation of the project and program budget and financial performance.
- Project quality and risk management, such as defining and measuring the project and program quality and risks, and implementing the quality and risk response actions, and tracking the impact and effectiveness of the quality and risk management activities and outcomes.
- Project communication and collaboration, such as sharing and exchanging the project and program information, documents, and updates among the project and program stakeholders, and facilitating the feedback and input from the customers and stakeholders.
- Project reporting and dashboarding, such as generating and displaying the project and program performance, status, and outcomes using various charts, graphs, and indicators, and providing the visibility and transparency of the project and program information and data.

Some examples of project management software are Microsoft Project, Primavera, Smartsheet, Wrike, and Asana.

6.4.2 Collaboration Tools

Collaboration tools are tools that help the PMO to communicate, coordinate, and cooperate with the project and program stakeholders. Collaboration tools can provide various features and functionalities, such as:

- Instant messaging and chat, such as sending and receiving text, audio, or video messages in real time, and having instant and direct communication with the project and program stakeholders.
- Email and calendar, such as sending and receiving emails and attachments, and scheduling and managing appointments and events, and having formal and organized communication with the project and program stakeholders.
- Video and web conferencing, such as conducting and participating in online meetings, presentations, and trainings, and having interactive and engaging communication with the project and program stakeholders.
- File sharing and storage, such as uploading and downloading files and folders, and accessing and managing them from different devices and locations, and having secure and convenient sharing and storage of the project and program information and documents.

- Online workspace and community, such as creating and joining online groups and forums, and interacting and engaging with other members, and having collaborative and cooperative working and learning environment with the project and program stakeholders.

Some examples of collaboration tools are Slack, Zoom, Google Workspace, Dropbox, and Microsoft Teams.

7. PERFORMANCE MEASUREMENT AND METRICS

Performance measurement and metrics are the methods and tools used to monitor, evaluate, and communicate the progress and outcomes of a project or program. They help to ensure that the project or program is on track, aligned with the objectives and expectations of the stakeholders, and delivering value and benefits. Some of the aspects of performance measurement and metrics are:

7.1 Key Performance Indicators (KPIs)

Key Performance Indicators (KPIs) are the specific and measurable indicators that reflect the critical success factors of a project or program. They are used to track and compare the actual performance against the planned or expected performance, and to identify any gaps or deviations that need to be addressed. KPIs can be categorized into different types, such as input, output, outcome, process, quality, and impact indicators. Examples of KPIs are:

- **Input indicators:** These measure the resources and efforts that are invested in the project or program, such as time, money, staff, materials, and equipment. They help to assess the efficiency and productivity of the project or program. Examples of input indicators are budget, duration, staff hours, and materials used.
- **Output indicators:** These measure the products and services that are delivered by the project or program, such as deliverables, milestones, and outputs. They help to assess the quantity and quality of the project or program results. Examples of output indicators are number of deliverables, completion rate, defect rate, and customer feedback.
- **Outcome indicators:** These measure the effects and benefits that are achieved by the project or program, such as changes, improvements, and impacts. They help to assess the relevance and value of the project or

program outcomes. Examples of outcome indicators are customer satisfaction, stakeholder satisfaction, return on investment, and net present value. **Process indicators:** These measure the activities and methods that are used

¶ to implement the project or program, such as processes, procedures, and standards. They help to assess the effectiveness and compliance of the project or program execution. Examples of process indicators are adherence to schedule, adherence to scope, adherence to quality, and risk management.

¶ **Quality indicators:** These measure the degree of excellence and reliability of the project or program outputs and outcomes, such as quality, performance, and functionality. They help to assess the suitability and durability of the project or program deliverables. Examples of quality indicators are customer requirements, technical specifications, quality standards, and testing results.

¶ **Impact indicators:** These measure the long-term and sustainable effects and benefits that are generated by the project or program, such as social, environmental, and economic impacts. They help to assess the contribution and significance of the project or program outcomes. Examples of impact indicators are market share, customer loyalty, environmental footprint, and social responsibility.

7.2 Project Reporting and Dashboards

Project Reporting and Dashboards are the tools and formats used to present and communicate the performance data and information to the relevant stakeholders in a clear, concise, and timely manner. They provide an overview and summary of the current status and progress of the project or program, highlight the key issues and risks, and recommend the actions and decisions needed. Project reporting and dashboards can be customized according to the needs and preferences of the audience, such as using text, tables, charts, graphs, or visual aids. Examples of project reports and dashboards are:

¶**Status reports:** These are the regular and periodic reports that provide the basic and essential information about the project or program performance, such as the current status, achievements, issues, and risks. They help to keep the stakeholders informed and updated on the project or program progress. Examples of status reports are weekly reports, monthly reports, and quarterly reports.

- **Progress reports:** These are the detailed and comprehensive reports that provide the in-depth and extensive information about the project or program performance, such as the accomplishments, challenges, lessons learned, and recommendations. They help to share the insights and knowledge gained from the project or program implementation. Examples of progress reports are milestone reports, phase reports, and final reports.
- **Exception reports:** These are the specific and urgent reports that provide the critical and important information about the project or program performance, such as the deviations, problems, and issues that require immediate attention and action. They help to alert and notify the stakeholders about the project or program issues and risks. Examples of exception reports are issue reports, risk reports, and change requests.
- **Balanced scorecards:** These are the strategic and holistic reports that provide the balanced and integrated information about the project or program performance, such as the financial, customer, internal, and learning perspectives. They help to align and measure the project or program objectives and outcomes with the organizational vision and mission. Examples of balanced scorecards are strategy maps, performance scorecards, and outcome scorecards.

7.3 Continuous Improvement and Feedback Loops

Continuous Improvement and Feedback Loops are the processes and mechanisms used to collect, analyze, and incorporate the feedback and lessons learned from the performance measurement and metrics into the project or program management and improvement. They help to identify and implement the best practices and opportunities for enhancement, and to avoid or minimize the errors and pitfalls. Continuous improvement and feedback loops can involve various methods and techniques, such as surveys, interviews, focus groups, audits, reviews, and benchmarking. Examples of continuous improvement and feedback loops are:

- **Plan-Do-Check-Act cycle**: This is a four-step cycle that involves planning the project or program activities and objectives, executing the project or program activities and deliverables, checking the project or program results and performance, and acting on the project or program feedback and improvement. It helps to apply the scientific method and the iterative approach to the project or program management and improvement.

- **Agile methodology:** This is a flexible and adaptive methodology that involves delivering the project or program outputs and outcomes in small and incremental iterations, collaborating and communicating with the project or program stakeholders and customers, and responding and adjusting to the project or program changes and feedback. It helps to apply the customer-centric and value-driven approach to the project or program management and improvement. **Six Sigma:** This is a data-driven and
- statistical methodology that involves
  defining the project or program problem and goal, measuring the project or program data and performance, analyzing the project or program data and causes, improving the project or program processes and solutions, and controlling the project or program results and quality. It helps to apply the rigorous and systematic approach to the project or program management and improvement.

8. CHANGE MANAGEMENT

Change management is the process of planning, implementing, and managing the changes that occur in a project or program. Change management aims to minimize the negative impacts of change, maximize the positive outcomes of change, and ensure that the project or program objectives are met. In this section, we will discuss the following topics:

¶**Understanding change management:** This involves recognizing the types, sources, and impacts of change, as well as the benefits, risks, and challenges of change. It also involves identifying the stakeholders, sponsors, and champions of change, and their roles and responsibilities in the change process.

¶**Change management frameworks:** These are the models, methods, and tools that help to guide and support the change management process. Some examples of change management frameworks are Kotter's eight-step model, ADKAR model, Lewin's three-stage model, and Bridges' transition model. Each framework has its own advantages and disadvantages, and can be adapted to suit the specific context and needs of the project or program.

¶**Integrating change management with PMO:** This involves aligning the change management activities and deliverables with the project or program management activities and deliverables, and ensuring that both are coordinated and consistent. It also involves establishing the roles and responsibilities of the PMO and the change management team, and communicating and collaborating effectively throughout the change process.

8.1 Understanding Change Management

Change is inevitable in any project or program, as it is influenced by various internal and external factors, such as stakeholder expectations, customer feedback, market trends, technological innovations, regulatory requirements, and organizational strategies. Change can be positive or negative, planned or unplanned, incremental or radical, and adaptive or transformative. Change can have various impacts on the project or program scope, schedule, cost, quality, risk, and benefits, as well as on the people, processes, and culture involved.

Understanding change management is essential for any project or program manager, as it helps them to:

- Assess the need and readiness for change, and the potential benefits and risks of change.
- Develop a clear vision and objectives for change, and a compelling case for change.
- Identify and engage the stakeholders, sponsors, and champions of change, and understand their expectations, needs, and concerns.
- Design and implement a change management strategy and plan, and align it with the project or program management plan.
- Monitor and control the change management process, and measure and report the progress and outcomes of change.
- Manage the resistance and issues that may arise during the change process, and address them effectively.
- Reinforce and sustain the change, and ensure that the desired benefits and value are realized and maintained.

8.2 Change Management Frameworks

Change management frameworks are the models, methods, and tools that help to guide and support the change management process. They provide a structured and systematic approach to plan, implement, and manage change, and to address the technical, organizational, and human aspects of change. There are various change management frameworks available, and each one has its own strengths and weaknesses, and can be adapted to suit the specific context and needs of the project or program. Some of the common change management frameworks are:

- **Kotter's eight-step model:** This model was developed by John Kotter, a renowned change management expert and author. It consists of eight steps that cover the phases of creating, implementing, and sustaining change. The steps are:

1) Create a sense of urgency
2) Build a guiding coalition
3) Form a strategic vision and initiatives
4) Enlist a volunteer army
5) Enable action by removing barriers
6) Generate short-term wins
7) Sustain acceleration
8) Institute change.

- **ADKAR model:** This model was developed by Prosci, a leading change management research and consulting firm. It is based on five elements that represent the individual and organizational levels of change. The elements are:

  1) Awareness of the need for change
  2) Desire to participate and support the change
  3) Knowledge of how to change
  4) Ability to implement the change
  5) Reinforcement to sustain the change.

- **Lewin's three-stage model:** This model was developed by Kurt Lewin, a pioneer of social psychology and organizational change. It consists of three stages that describe the process of unfreezing, changing, and refreezing. The stages are:

  1) Unfreeze the current state
  2) Change to the desired state
  3) Refreeze the new state.

- **Bridges' transition model:** This model was developed by William Bridges, a prominent change management consultant and author. It focuses on the psychological and emotional aspects of change, and the transition that people go through during change. It consists of three phases that describe the process of letting go, entering the neutral zone, and embracing the new beginning. The phases are:

  1) Ending, losing, and letting go,
  2) The neutral zone, and
  3) The new beginning.

8.3 Integrating Change Management with PMO

Integrating change management with PMO is crucial for the success of any project or program, as it ensures that the change management activities and deliverables are aligned with the project or program management activities and deliverables,

and that both are coordinated and consistent. It also ensures that the roles and responsibilities of the PMO and the change management team are clearly defined and agreed upon, and that both teams communicate and collaborate effectively throughout the change process. Some of the benefits of integrating change management with PMO are:

¶ Enhanced stakeholder engagement and satisfaction, as the stakeholders are involved and informed throughout the change process, and their expectations, needs, and concerns are addressed.

¶ Improved project or program performance and outcomes, as the change management activities and deliverables support the achievement of the project or program objectives and benefits.

¶ Reduced risks and issues, as the change management activities and deliverables help to identify, mitigate, and resolve the potential and actual risks and issues that may arise during the change process.

¶ Increased adoption and sustainability of change, as the change management activities and deliverables help to prepare, equip, and support the people, processes, and culture for the change, and to reinforce and maintain the change.

Some of the best practices for integrating change management with PMO are:

¶ Establish a clear governance structure and process for change management, and define the roles and responsibilities of the PMO and the change management team, and their relationship and reporting lines.

¶ Develop a change management strategy and plan, and align it with the project or program management strategy and plan, and ensure that both are updated and reviewed regularly.

¶ Conduct a change impact assessment and a stakeholder analysis, and use the results to inform the change management and the project or program management activities and deliverables.

¶ Implement a change management communication and engagement plan, and coordinate it with the project or program management communication and engagement plan, and ensure that both are consistent and effective.

¶ Monitor and control the change management process, and measure and report the progress and outcomes of change, and use the feedback and data to improve the change management and the project or program management activities and deliverables.

- Conduct a change management readiness and adoption assessment, and use the results to evaluate the success and sustainability of change, and to identify and address any gaps or issues. Conduct a change management
- lesson learned and best practices review,
  and use the results to capture and share the knowledge and experience gained from the change process, and to identify and implement any improvement opportunities.

9. COMMUNICATION AND STAKEHOLDER MANAGEMENT

Communication and stakeholder management are essential aspects of change management, as they involve informing, engaging, and influencing the people who are affected by or involved in the change process. Effective communication and stakeholder management can help to build trust, reduce resistance, increase commitment, and achieve the desired outcomes of change.

9.1 Communication Strategies

Communication strategies are the plans and methods for delivering information and messages to the target audiences of change. Communication strategies should be aligned with the change vision, objectives, and plan, and should consider the following elements:

- The purpose and scope of communication: what is the main goal and content of communication, and how does it support the change process?
- The communication channels and tools: how will the information and messages be delivered, and what are the advantages and disadvantages of each option?
- The communication frequency and timing: how often and when will the communication take place, and how does it fit with the change milestones and activities?
- The communication roles and responsibilities: who will be responsible for creating, delivering, and receiving communication, and what are their expectations and accountabilities?
- The communication feedback and evaluation: how will the communication effectiveness and impact be measured and monitored, and what are the feedback mechanisms and improvement opportunities?

Some examples of communication strategies are:

¶ A change newsletter that provides regular updates and highlights on the change progress, benefits, and achievements, and that features success stories and testimonials from the change agents and champions.

¶ A change intranet site that serves as a central repository of information and resources related to the change, and that allows users to access and share relevant documents, videos, podcasts, webinars, FAQs, and forums.

¶ A change roadshow that involves visiting different locations and departments to present and discuss the change vision, plan, and impacts, and to solicit feedback and input from the stakeholders.

¶ A change town hall meeting that brings together senior leaders, change sponsors, and key stakeholders to communicate and demonstrate the strategic importance and urgency of the change, and to address any concerns and questions.

¶ A change workshop that engages the stakeholders in interactive and experiential learning activities to familiarize them with the new processes, systems, or behaviors, and to provide them with opportunities to practice and apply the change.

9.2 Stakeholder Analysis and Engagement

Stakeholder analysis and engagement are the processes of identifying, assessing, and involving the people who have an interest or stake in the change process. Stakeholder analysis and engagement should be conducted throughout the change lifecycle, and should consider the following elements:

¶The stakeholder identification and mapping: who are the stakeholders of change, and how are they categorized and prioritized based on their power, influence, interest, and attitude?

¶The stakeholder needs and expectations: what are the stakeholders' concerns> and desires regarding the change, and how do they perceive the benefits and risks of the change?

¶The stakeholder communication and involvement: what are the appropriate and effective ways to inform, consult, collaborate, and empower the stakeholders, and how do they vary according to the stakeholder segments and phases of change?

¶ The stakeholder resistance and support: what are the potential sources and signs of stakeholder resistance or support, and how can they be managed and leveraged to facilitate the change process?

¶ The stakeholder feedback and evaluation: how will the stakeholder satisfaction and engagement be measured and monitored, and what are the feedback mechanisms and improvement opportunities?

Some examples of stakeholder analysis and engagement are:

A stakeholder matrix that plots the stakeholders on a grid based on their level of interest and influence, and that assigns different strategies for each quadrant, such as monitor, inform, consult, or involve.

¶ A stakeholder profile that summarizes the key information and characteristics of each stakeholder group, such as their role, impact, needs, expectations, communication preferences, and readiness for change.

¶ A stakeholder survey that collects and analyzes the data and opinions of the stakeholders on various aspects of the change, such as their awareness, understanding, agreement, commitment, and adoption.

¶ A stakeholder interview that involves conducting one-on-one or focus group discussions with the stakeholders to explore and understand their perspectives, feelings, and experiences related to the change.

¶ A stakeholder workshop that engages the stakeholders in co-creating and co-designing the change solutions, and that solicits their input and feedback on the change plan, processes, and outcomes.

9.3 Managing Expectations and Feedback

Managing expectations and feedback are the processes of setting and aligning the stakeholder expectations and providing and receiving the stakeholder feedback throughout the change process. Managing expectations and feedback should be based on trust, transparency, and mutual respect, and should consider the following elements:

¶**The expectation setting and alignment:** what are the realistic and achievable expectations for the change process and outcomes, and how are they communicated and agreed upon by the stakeholders?

¶**The feedback provision and reception:** what are the constructive and actionable feedback for the change process and outcomes, and how are they delivered and received by the stakeholders?

¶ **The feedback analysis and response:** what are the key insights and implications from the feedback, and how are they used to inform and improve the change process and outcomes?

¶ **The expectation and feedback management roles and responsibilities:** who will be responsible for setting, aligning, providing, receiving, analyzing, and responding to the expectations and feedback, and what are their expectations and accountabilities?

¶ **The expectation and feedback management feedback and evaluation:** how will the expectation and feedback management effectiveness and impact be measured and monitored, and what are the feedback mechanisms and improvement opportunities?

Some examples of managing expectations and feedback are:

¶ An expectation contract> that specifies and documents the roles, responsibilities, deliverables, timelines, and success criteria for the change process and outcomes, and that serves as a reference and agreement for the stakeholders.

¶ A feedback form that provides a structured and standardized format for collecting and providing feedback on the change process and outcomes, and that covers areas such as strengths, weaknesses, opportunities, and threats.

¶ A feedback report that summarizes and presents the feedback data and findings, and that highlights the key themes, patterns, gaps, and issues related to the change process and outcomes.

¶ A feedback meeting that involves discussing and reviewing the feedback report with the stakeholders, and that allows for clarifying, validating, and prioritizing the feedback items.

¶ A feedback action plan that outlines and implements the actions and solutions for addressing and resolving the feedback items, and that assigns the owners, resources, deadlines, and measures for each action.

10. PMO MATURITY AND EVOLUTION

The project management office(PMO) is notastatic entity that remains the same over time. Rather, it is a dynamic and adaptive organization that evolves in response to the changing needs and expectations of its stakeholders, the complexity and uncertainty of the projects it supports, and the maturity and capability of its processes and practices. Therefore, it is important for a PMO to assess its current level of maturity and plan for its future development and improvement.

10.1 PMO Maturity Models

A PMO maturity model is a framework that describes the characteristics and best practices of a PMO at different levels of maturity, from initial to optimized. A PMO maturity model can help a PMO to:

¶Benchmark its current performance and identify its strengths and weaknesses. For example, a PMO can use a maturity model to evaluate how well it aligns its projects with the organizational strategy, how effectively it governs and controls its project portfolio, how efficiently it executes and delivers its projects, how consistently it applies its processes and methods, how adequately it utilizes its tools and resources, how competently it develops and manages its people, how positively it influences the organizational culture, and how successfully it demonstrates its value and benefits.

¶Determine the gaps and opportunities for improvement and prioritize them based on their value and feasibility. For example, a PMO can use a maturity model to identify the areas where it falls short of the expected or desired level of performance, the root causes of the gaps, the potential solutions and alternatives for closing the gaps, the expected outcomes and benefits of the improvement, and the challenges and risks of the improvement.

¶Define the vision and goals for the desired level of maturity and align them with the strategic objectives of the organization. For example, a PMO can use a maturity model to set a clear and realistic target for its maturity level, based on the organizational vision, mission, values, and goals, the stakeholder needs and expectations, the industry standards and benchmarks, and the PMO's own capabilities and aspirations.

¶ Establish a roadmap and action plan for achieving the maturity goals and monitor and measure the progress and results. For example, a PMO can use a maturity model to develop a detailed and comprehensive plan for implementing the improvement initiatives and actions, assigning the roles and responsibilities, allocating the resources and budget, managing the risks and issues, tracking and evaluating the performance and outcomes, and reporting and communicating the status and achievements.

There are various PMO maturity models available in the literature and practice, such as the PMI's Organizational Project Management Maturity Model (OPM3), the Portfolio, Program, and Project Management Maturity Model (P3M3), and the Project Management Maturity Model (PMMM). These models differ in their scope, dimensions, criteria, and assessment methods, but they generally share some common features, such as:

¶ They define a series of maturity levels, usually ranging from 1 to 5, with higher levels indicating higher degrees of sophistication, integration, standardization, and optimization. For example, a PMO at level 1 may have ad hoc and inconsistent practices, a PMO at level 2 may have repeatable and documented practices, a PMO at level 3 may have defined and standardized practices, a PMO at level 4 may have measured and controlled practices, and a PMO at level 5 may have optimized and innovative practices.

¶ They describe the attributes and practices of a PMO at each maturity level, across multiple domains or areas, such as strategy, governance, processes, methods, tools, people, culture, and performance. For example, a PMO maturity model may describe how a PMO at each level aligns its projects with the organizational strategy, how it governs and controls its project portfolio, how it executes and delivers its projects, how it applies its processes and methods, how it utilizes its tools and resources, how it develops and manages its people, how it influences the organizational culture, and how it demonstrates its value and benefits.

¶ They provide a method for assessing the current and desired maturity levels of a PMO, using various techniques, such as self-assessment, interviews, surveys, audits, or benchmarking. For example, a PMO maturity model may provide a questionnaire or a checklist for the PMO to self-assess its maturity level, or it may provide a set of criteria or indicators for an external auditor or a benchmarking partner to evaluate the PMO's maturity level.

¶ They provide guidance and recommendations for improving the maturity level of a PMO, based on the assessment results and the improvement objectives. For example, a PMO maturity model may provide a set of best practices or action items for the PMO to implement in order to improve its maturity level, or it may provide a roadmap or a framework for the PMO to follow in order to achieve its maturity goals.

10.2 Assessing PMO Maturity

Assessing the maturity level of a PMO is a critical step for developing and enhancing the PMO's capabilities and value. A PMO maturity assessment can help a PMO to:

¶Understand its current state and performance, and how it compares to the industry standards and best practices. For example, a PMO maturity assessment can help a PMO to determine how well it performs in each domain or area of the maturity model, what are its strengths and weaknesses, what are the areas of satisfaction and dissatisfaction, and how it ranks among its peers or competitors.

¶Identify the areas of improvement and the root causes of the problems or issues. For example, a PMO maturity assessment can help a PMO to identify the gaps between its current and desired maturity levels, the reasons behind the gaps, the impact and consequences of the gaps, and the opportunities and benefits of closing the gaps.

¶Prioritize the improvement initiatives and allocate the resources accordingly. For example, a PMO maturity assessment can help a PMO to prioritize the improvement initiatives and actions based on their value and feasibility, their urgency and importance, their alignment with the organizational and PMO goals, and their dependencies and interrelationships. It can also help a PMO to allocate the resources and budget for the improvement project, based on the scope and complexity of the improvement, the availability and constraints of the resources, and the expected return on investment.

¶Communicate the improvement needs and benefits to>the stakeholders and gain their support and commitment. For example, a PMO maturity assessment can help a PMO to communicate the improvement needs and benefits to the stakeholders, such as the senior management, the project sponsors, the project managers, the project teams, and the project

customers, and explain how the improvement will align with their interests and expectations, how it will enhance the PMO's performance and value, and how it will contribute to the organizational success. It can also help a PMO to gain the support and commitment of the stakeholders, by involving them in the assessment and improvement process, soliciting their feedback and input, addressing their concerns and objections, and recognizing and rewarding their contributions and achievements.

¶ Demonstrate the improvement results and achievements and celebrate the successes. For example, a PMO maturity assessment can help a PMO to demonstrate the improvement results and achievements to the stakeholders, by measuring and reporting the improvement performance and outcomes, comparing the before and after states of the PMO's maturity level, highlighting the benefits and value of the improvement, and showcasing the best practices and success stories. It can also help a PMO to celebrate the successes of the improvement project, by acknowledging and appreciating the efforts and accomplishments of the improvement team and the stakeholders, sharing the lessons learned and the best practices, and rewarding and recognizing the excellence and innovation.

A PMO maturity assessment can be conducted using various approaches, such as:

¶ Using a predefined maturity model and following its assessment method and criteria. For example, a PMO can use an existing maturity model, such as OPM3, P3M3, or PMMM, and follow its assessment method and criteria, such as a questionnaire, a checklist, a scorecard, or a rating scale, to assess its maturity level. This approach can provide a standardized and consistent way of assessing the PMO's maturity level, and enable a comparison and benchmarking with other PMOs or organizations that use the same maturity model.

¶ Adapting or customizing an existing maturity model to suit the specific context and needs of the PMO. For example, a PMO can adapt or customize an existing maturity model, such as OPM3, P3M3, or PMMM, to suit its specific context and needs, such as its organizational structure, culture, strategy, goals, and priorities, its project portfolio, complexity, and uncertainty, and its stakeholder needs and expectations. This approach can

provide a more relevant and tailored way of assessing the PMO's maturity level, and enable a more realistic and achievable improvement plan.

¶ Developing a customized maturity model and assessment method based on the PMO's own goals and standards. For example, a PMO can develop its own maturity model and assessment method, based on its own goals and standards, such as its vision and mission, its values and principles, its best practices and lessons learned, and its performance indicators and measures. This approach can provide a more unique and innovative way of assessing the PMO's maturity level, and enable a more creative and flexible improvement plan.

Regardless of the approach, a PMO maturity assessment should follow some general steps, such as:

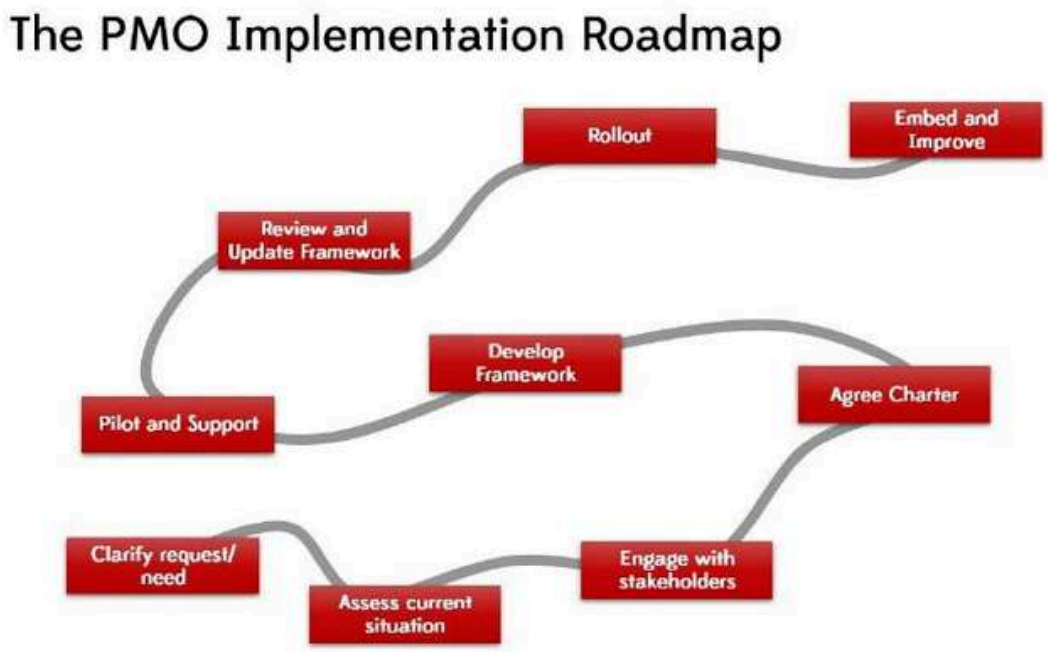
1. Define the scope and objectives of the assessment and select the maturity model and assessment method. For example, a PMO should define the scope and objectives of the assessment, such as the purpose and rationale of the assessment, the scope and boundaries of the assessment, the expected outcomes and benefits of the assessment, and the stakeholders and roles involved in the assessment. It should also select the maturity model and assessment method, such as the predefined, adapted, or customized maturity model, and the self-assessment, interview, survey, audit, or benchmarking assessment method.
2. Collect and analyze the data and evidence related to the PMO's attributes and practices, using various sources and techniques, such as documents, interviews, surveys, observations, or audits. For example, a PMO should collect and analyze the data and evidence related to the PMO's attributes and practices, such as the PMO's strategy, governance, processes, methods, tools, people, culture, and performance, using various sources and techniques, such as the PMO's documents, such as policies, procedures, plans, reports, or templates, the PMO's interviews, such as with the PMO director, staff, or stakeholders, the PMO's surveys, such as questionnaires, checklists, or rating scales, the PMO's observations, such as site visits, workshops, or meetings, or the PMO's audits, such as internal or external audits, or benchmarking partners.
3. Evaluate and score the PMO's maturity level for each domain or area, and aggregate the scores to obtain the overall maturity level. For example, a PMO

should evaluate and score the PMO's maturity level for each domain or area, such as strategy, governance, processes, methods, tools, people, culture, and performance, based on the maturity model and assessment method, such as the predefined, adapted, or customized maturity model, and the self-assessment, interview, survey, audit, or benchmarking assessment method. It should also aggregate the scores for each domain or area to obtain the overall maturity level, such as by using a weighted average, a simple average, or a maximum score.

4. Compare the current maturity level with the desired or target maturity level and identify the gaps and improvement opportunities. For example, a PMO should compare the current maturity level with the desired or target maturity level, such as the level that the PMO aspires to achieve, the level that the organization or the stakeholders expect the PMO to achieve, or the level that the industry or the best practices suggest the PMO to achieve. It should also identify the gaps and improvement opportunities, such as the areas where the PMO falls short of the desired or target maturity level, the reasons behind the gaps, the impact and consequences of the gaps, and the potential solutions and alternatives for closing the gaps.

5. Prepare and present the assessment report and findings, and solicit the feedback and validation from the stakeholders. For example, a PMO should prepare and present the assessment report and findings, such as the summary and overview of the assessment process and results, the details and analysis of the PMO's current and desired or target maturity levels, the gaps and improvement opportunities, and the recommendations and action items for the improvement. It should also solicit the feedback and validation from the stakeholders, such as the senior management, the project sponsors, the project managers, the project teams, and the project customers, and ensure that the assessment report and findings are accurate, complete, relevant, and reliable.

10.3 Roadmap for PMO Development



A roadmap for PMO development is a plan that outlines the actions and steps for improving the maturity level of a PMO and achieving its vision and goals. A roadmap for PMO development can help a PMO to:

¶Translate the assessment results and findings into concrete and actionable improvement initiatives. For example, a roadmap for PMO development can help a PMO to translate the assessment results and findings, such as the gaps and improvement opportunities, the recommendations and action items, and the expected outcomes and benefits, into concrete and actionable improvement initiatives, such as the specific and measurable improvement objectives, the scope and deliverables of the improvement project, the roles and responsibilities of the improvement team and the stakeholders, and the resources and budget required for the improvement project.

¶Sequence and schedule the improvement initiatives based on their dependencies, priorities, and resources. For example, a roadmap for PMO development can help a PMO to sequence and schedule the improvement initiatives, based on their dependencies, priorities, and resources, such as the logical and chronological order of the improvement initiatives, the urgency and importance of the improvement initiatives, the alignment of the

improvement initiatives with the organizational and PMO goals, and the availability and constraints of the resources and budget.

¶ Assign the roles and responsibilities for implementing and managing the improvement initiatives. For example, a roadmap for PMO development can help a PMO to assign the roles and responsibilities for implementing and managing the improvement initiatives, such as the leader and sponsor of the improvement project, the members and contributors of the improvement team, the stakeholders and beneficiaries of the improvement project, and the roles and responsibilities for planning, executing, monitoring, and controlling the improvement project.

¶ Define the measures and indicators for tracking and evaluating the improvement progress and outcomes. For example, a roadmap for PMO development can help a PMO to define the measures and indicators for tracking and evaluating the improvement progress and outcomes, such as the performance and outcome measures and indicators, such as the quality, time, cost, scope, and value of the improvement project, the baseline and target values for the measures and indicators, such as the current and desired or target maturity levels, the data collection and analysis methods and tools, such as the surveys, audits, reports, or dashboards, and the frequency and format of the reporting and feedback, such as the weekly, monthly, or quarterly reports, or the meetings, workshops, or presentations.

¶ Communicate and align the improvement plan and expectations with the stakeholders and secure their buy-in and support. For example, a roadmap for PMO development can help a PMO to communicate and align the improvement plan and expectations with the stakeholders, such as the senior management, the project sponsors, the project managers, the project teams, and the project customers, and explain how the improvement plan and expectations are aligned with their interests and expectations, how the improvement project will enhance the PMO's performance and value, and how the improvement project will contribute to the organizational success. It can also help a PMO to secure the buy-in and support of the stakeholders, by involving them in the improvement project, soliciting their feedback and input, addressing their concerns and objections, and recognizing and rewarding their contributions and achievements.

A roadmap for PMO development can be developed using various tools and techniques, such as:

¶ Using a maturity model and following its guidance and recommendations for improving the PMO's maturity level. For example, a PMO can use a maturity model, such as OPM3, P3M3, or PMMM, and follow its guidance and recommendations for improving the PMO's maturity level, such as the best practices or action items for each domain or area, the roadmap or framework for achieving the maturity goals, and the examples or case studies of successful PMO improvement projects. This tool or technique can provide a structured and systematic way of developing a roadmap for PMO development, and enable a consistent and comprehensive improvement plan.

¶ Using a project management approach and applying the project management processes, methods, tools, and best practices for planning, executing, monitoring, and controlling the improvement project. For example, a PMO can use a project management approach, such as the PMI's Project Management Body of Knowledge (PMBOK), and apply the project management processes, methods, tools, and best practices for planning, executing, monitoring, and controlling the improvement project, such as the project charter, the project plan, the work breakdown structure, the schedule, the budget, the risk register, the change log, the issue log, the quality plan, the communication plan, the stakeholder register, the status report, the lessons learned, and the closure report. This tool or technique can provide a proven and effective way of developing a roadmap for PMO development, and enable a successful and efficient improvement project.

¶ Using a change management approach and applying the change management principles, models, strategies, and techniques for managing the people and behavioral aspects of the improvement change. For example, a PMO can use a change management approach, such as the Kotter's 8-Step Change Model, and apply the change management principles, models, strategies, and techniques for managing the people and behavioral aspects of the improvement change, such as the urgency, the vision, the coalition, the communication, the empowerment, the short-term wins, the consolidation, and the anchoring. This tool or technique can provide a human and behavioral way of developing a roadmap for PMO development, and enable a smooth and sustainable improvement change.

Regardless of the tool or technique, a roadmap for PMO development should include some key elements, such as:

- The vision and goals for the PMO's desired maturity level and the benefits and value it will deliver. For example, a roadmap for PMO development should include the vision and goals for the PMO's desired maturity level, such as the level that the PMO aspires to achieve, the level that the organization or the stakeholders expect the PMO to achieve, or the level that the industry or the best practices suggest the PMO to achieve, and the benefits and value it will deliver, such as the improvement in the PMO's performance and value, the alignment with the organizational strategy and goals, and the contribution to the organizational success. The current and
- target maturity levels for each domain or area and the gap analysis>results. For example, a roadmap for PMO development should include the current and target maturity levels for each domain or area, such as strategy, governance, processes, methods, tools, people, culture, and performance, based on the maturity model and assessment method, such as the predefined, adapted, or customized maturity model, and the self-assessment, interview, survey, audit, or benchmarking assessment method, and the gap analysis results, such as the areas where the PMO falls short of the desired or target maturity level, the reasons behind the gaps, the impact and consequences of the gaps, and the potential solutions and alternatives for closing the gaps. The improvement initiatives and actions for each
- domain or area and their alignment with the PMO's vision and goals. For example, a roadmap for PMO development should include the improvement initiatives and actions for each domain or area, such as the specific and measurable improvement objectives, the scope and deliverables of the improvement project, the roles and responsibilities of the improvement team and the stakeholders, and the resources and budget required for the improvement project, and their alignment with the PMO's vision and goals, such as how the improvement initiatives and actions will help the PMO to achieve its desired or target maturity level, and how they will support the PMO's vision and goals. The timeline and milestones for completing the improvement initiatives and actions and achieving the maturity goals. For
- example, a roadmap for PMO development should include the timeline and milestones for completing the improvement initiatives and actions and achieving the maturity goals, such as the start and end dates, the duration, the dependencies, the critical path, the milestones, and the deliverables of the improvement project, and how

they will be tracked and monitored, such as the frequency and format of the status report, the meetings, the workshops, or the presentations. The roles and responsibilities for the improvement team and the stakeholders and their involvement and contribution. For example, a roadmap for PMO development should include the roles and responsibilities for the improvement team and the stakeholders and their involvement and contribution, such as the leader and sponsor of the improvement project, the members and contributors of the improvement team, the stakeholders and beneficiaries of the improvement project, and the roles and responsibilities for planning, executing, monitoring, and controlling the improvement project, and how they will be involved and engaged, such as the communication plan, the feedback and input mechanisms, the concerns and objections resolution, and the recognition and reward systems. The resources and budget required for implementing the improvement initiatives and actions and securing their availability and allocation. For example, a roadmap for PMO development should include the resources and budget required for implementing the improvement initiatives and actions and securing their availability and allocation, such as the human, physical, financial, and technological resources, the estimated and actual costs, the sources and constraints of the resources and budget, and the availability and allocation plan, and how they will be managed and controlled, such as the resource management plan, the budget management plan, the change management plan, and the issue management plan. The risks and issues that may affect the improvement project and the mitigation and contingency plans. For example, a roadmap for PMO development should include the risks and issues that may affect the improvement project and the mitigation and contingency plans, such as the potential and actual threats and opportunities, the probability and impact of the risks and issues, the risk and issue register, the risk and issue analysis and response plan, and the escalation and resolution process, and how they will be managed and controlled, such as the risk management plan, the issue management plan, the change management plan, and the quality management plan.

- The measures and indicators for monitoring and evaluating the improvement performance and results and the reporting and feedback mechanisms. For example, a roadmap for PMO development should include

the measures and indicators for monitoring and evaluating the improvement performance and results and the reporting and feedback mechanisms, such as the performance and outcome measures and indicators, such as the quality, time, cost, scope, and value of the improvement project, the baseline and target values for the measures and indicators, such as the current and desired or target maturity levels, the data collection and analysis methods and tools, such as the surveys, audits, reports, or dashboards, and the frequency and format of the reporting and feedback, such as the weekly, monthly, or quarterly reports, or the meetings, workshops, or presentations, and how they will be managed and controlled, such as the performance management plan, the quality management plan, the communication management plan, and the stakeholder management plan.

11. CASE STUDIES AND BEST PRACTICES

This sectionprovidessomeexamples ofsuccessfuland unsuccessful PMO implementations, as well as some best practices for establishing and running a PMO.

11.1 Successful PMO Implementations

There are many examples of organizations that have implemented PMOs and achieved positive results, such as improved project performance, increased customer satisfaction, enhanced strategic alignment, and reduced costs. Some of these examples are:

- The United Nations Development Programme (UNDP) established a global PMO in 2014 to support its portfolio of more than 6,000 projects across 170 countries. The PMO provided standardized processes, tools, and templates for project management, as well as training, coaching, and mentoring for project staff. The PMO also facilitated knowledge sharing, collaboration, and reporting across the organization. As a result, the UNDP improved its project delivery rate from 56% in 2013 to 73% in 2017, and increased its stakeholder satisfaction from 75% to 85%. The PMO also helped the UNDP align its projects with its strategic goals and priorities, and demonstrate its value and impact to donors and partners.
- The Royal Bank of Scotland (RBS) created a PMO in 2012 to manage its large-scale transformation program, which involved more than 300 projects and 10,000 staff. The PMO provided governance, oversight, and coordination for the program, as well as guidance and support for the project teams. The PMO also implemented a robust change management and communication strategy, and a comprehensive performance measurement and reporting system. As a result, the RBS delivered its transformation program on time and within budget, and achieved significant benefits, such as improved customer service, increased operational efficiency, reduced risk, and enhanced reputation.
- The National Aeronautics and Space Administration (NASA) established a PMO in 2005 to manage its portfolio of more than 100 projects and programs, ranging from small research projects to large-scale missions. The PMO provided a consistent and integrated framework for project management, as well as best practices, standards, and methodologies. The

PMO also enabled cross-functional collaboration, stakeholder engagement, and knowledge management across the organization. As a result, the NASA improved its project success rate from 60% in 2004 to 90% in 2019, and increased its innovation, agility, and adaptability.

11.2 Lessons Learned from PMO Failures

However, not all PMO implementations are successful. There are also many examples of organizations that have failed to establish or sustain a PMO, or that have experienced negative outcomes from their PMO initiatives. Some of the common reasons for PMO failures are:

¶ Lack of clear vision, mission, and objectives for the PMO, leading to confusion, ambiguity, and misalignment among the stakeholders.

¶ Lack of senior management support and sponsorship for> the PMO, resulting in insufficient resources, authority, and influence for the PMO.

¶ Lack of stakeholder involvement and buy-in for the PMO, causing resistance, distrust, and conflict among the project teams and other organizational units.

¶Lack of alignment and integration between the PMO and the organizational strategy, culture, and processes, creating silos, duplication, and inefficiencies.

¶Lack of flexibility and agility for the PMO, making it unable to cope with changing business needs, customer expectations, and environmental factors.

¶Lack of value delivery and impact measurement for the PMO, preventing it from demonstrating its contribution and benefits to the organization and its stakeholders.

11.3 Applying Best Practices in PMO

To avoid the pitfalls of PMO failures and ensure the success of PMO implementations, there are some best practices that can be followed, such as:

¶ Define the purpose, scope, and role of the PMO, and align them with the organizational vision, mission, and goals.

¶ Secure the commitment and support of the senior management and key stakeholders for the PMO, and communicate the value proposition and benefits of the PMO to them.

- Engage and consult with the project teams and other organizational units, and understand their needs, expectations, and challenges.
- Adopt a tailored and fit-for-purpose approach for the PMO, and customize the processes, tools, and services according to the context and characteristics of the organization and its projects. Establish a clear and effective governance structure and process for the PMO, and define the roles, responsibilities, and accountabilities of the PMO and its stakeholders. Build a competent and capable PMO team, and provide them with adequate training, coaching, and development opportunities.
- Monitor and evaluate the performance and results of the PMO, and use relevant measures and indicators to track and report the progress and outcomes of the PMO.
- Continuously review and improve the PMO, and incorporate feedback, lessons learned, and best practices to enhance the PMO's efficiency, effectiveness, and maturity.

12. PROFESSIONAL PRACTICE

As PMO professionals,itis essentialto uphold high standards of professional practice and conduct oneself in an ethical and responsible manner. In this chapter, we will discuss the following topics:

12.1 Ethical Considerations: The principles and guidelines that govern the ethical behavior of PMO professionals, and the potential consequences of unethical conduct.

12.2 Career Development for PMO Professionals: The opportunities and challenges for PMO professionals to advance their careers, and the skills and competencies required to succeed in different PMO roles.

12.3 Networking and Professional Organizations: The benefits and strategies of building and maintaining a network of professional contacts, and the role and value of joining and participating in professional organizations related to PMO and project management.

12.1 Ethical Considerations

Ethics is the study of moral principles and values that guide human actions and decisions. Ethics is not only about knowing what is right or wrong, but also about applying those principles consistently and appropriately in different situations. Ethics is especially important for PMO professionals, who often have to deal with complex and sensitive issues that involve multiple stakeholders, resources, and risks. PMO professionals are expected to act with honesty, integrity, respect, fairness, and professionalism in all aspects of their work.

To help PMO professionals uphold ethical standards, there are several sources of guidance and support available, such as:

¶The Code of Ethics and Professional Conduct of the Project Management Institute (PMI), which defines the core values and expectations for PMI members and credential holders. The code covers four main areas: responsibility, respect, fairness, and honesty. The code also provides examples of ethical and unethical behaviors, and the process for reporting and resolving ethical violations.

¶The PMO Maturity Model (P3M3), which includes a dimension on organizational governance and ethics. This dimension assesses how well the organization ensures that its PMO and project management practices are

aligned with its vision, mission, values, and policies, and how it monitors and controls the ethical performance and compliance of its PMO and projects.

¶ The Organizational Project Management Maturity Model (OPM3), which includes a best practice on developing and implementing a code of ethics for project management. This best practice describes how to establish and communicate the ethical principles and expectations for the organization, the PMO, and the project teams, and how to provide training and support for ethical decision making and problem solving.

¶ The International Standard for Business Analysis (ISO 20700), which includes a clause on professional conduct and ethics for business analysts. This clause outlines the ethical responsibilities and obligations of business analysts, such as protecting the interests and confidentiality of their clients and stakeholders, avoiding conflicts of interest and undue influence, and adhering to applicable laws and regulations.

By following these and other relevant ethical codes and standards, PMO professionals can enhance their credibility, reputation,> and trustworthiness, and contribute to the success and sustainability of their PMO and projects. On the other hand, failing to act ethically can have serious negative consequences, such as:

¶ Damage to the reputation and image of the PMO, the project, the organization, and the profession.

¶ Loss of confidence and trust from the stakeholders, sponsors, clients, and team members.

¶ Legal liability and sanctions for breaching contracts, laws, or regulations.

¶ Dissatisfaction and demotivation of the PMO and project staff.

¶ Poor quality and performance of the PMO and project deliverables and outcomes.

¶ Waste of resources and opportunities.

12.2 Career Development for PMO Professionals

PMO professionals have a variety of career paths and opportunities available to them, depending on their interests, goals, skills, and experiences. PMO professionals can work in different types of PMOs, such as project, program, or portfolio PMOs, or in different functions, such as governance, support, or delivery. PMO professionals can also work in different domains, industries, sectors, or

regions, depending on the nature and scope of the projects and programs they support or manage.

To advance their careers, PMO professionals need to continuously develop and update their skills and competencies, and demonstrate their value and contribution to the PMO and the organization. Some of the skills and competencies that are essential for PMO professionals are:

- **Project management skills:** The ability to plan, execute, monitor, control, and close projects effectively and efficiently, following the best practices and standards of project management.
- **Program management skills:** The ability to coordinate, integrate, and align multiple projects and activities to achieve strategic objectives and benefits, following the best practices and standards of program management.
- **Portfolio management skills:** The ability to select, prioritize, and balance the investments and resources across the organization's projects and programs, following the best practices and standards of portfolio management.
- **Business analysis skills:** The ability to elicit, analyze, validate, and manage the requirements and expectations of the stakeholders, and to ensure that the PMO and project deliverables and outcomes meet the business needs and objectives.
- **Strategy management skills:** The ability to understand, align, and communicate the vision, mission, goals, and objectives of the organization, and to ensure that the PMO and project activities and outputs support and enable the organizational strategy.
- **Change management skills:** The ability to plan, implement, and manage the changes and transitions that result from the PMO and project initiatives, and to help the stakeholders and users adapt and adopt the new processes, systems, or behaviors.
- **Stakeholder management skills:** The ability to identify, engage, and influence the stakeholders who have an interest or impact on the PMO and project outcomes, and to build and maintain positive and collaborative relationships with them.
- **Risk> management skills:** The ability to identify, analyze, evaluate, and respond to the uncertainties and threats that may affect the PMO and project objectives, and to mitigate or exploit them as appropriate.

¶ **Quality management skills:** The ability to ensure that the PMO and project processes, products, and services meet or exceed the standards and expectations of quality, and to implement continuous improvement initiatives.

¶ **Communication skills:** The ability to convey and receive information and messages effectively and efficiently, using various modes, methods, and tools of communication, and adapting to different audiences, situations, and contexts.

¶ **Leadership skills:** The ability to inspire, motivate, and guide the PMO and project teams and stakeholders, and to create a shared vision, direction, and culture for the PMO and project success.

¶ **Teamwork skills:** The ability to collaborate and cooperate with the PMO and project team members and stakeholders, and to leverage the diversity, strengths, and contributions of each individual.

¶ **Problem-solving skills:** The ability to identify, analyze, and resolve the issues and challenges that arise during the PMO and project lifecycle, and to apply creative and critical thinking skills to find effective and efficient solutions.

¶ **Decision-making skills:** The ability to make timely and informed decisions based on the available data and information, and to consider the consequences and implications of each decision.

¶ **Learning skills:** The ability to acquire, retain, and apply new knowledge and skills, and to seek and use feedback, lessons learned, and best practices to improve oneself and one's work.

In addition to these skills and competencies, PMO professionals can also enhance their careers by obtaining relevant certifications, degrees, or credentials that demonstrate their knowledge and expertise in PMO and project management. Some of the common and recognized certifications, degrees, or credentials for PMO professionals are:

¶ The Project Management Professional (PMP) certification from PMI, which validates the competence and experience of project managers who lead and direct projects.

¶ The Program Management Professional (PgMP) certification from PMI, which validates the competence and experience of program managers who manage multiple related projects and programs.

¶ The Portfolio Management Professional (PfMP) certification from PMI, which validates the competence and experience of portfolio managers who manage and align the organization's portfolio of projects and programs. The Certified
¶ Associate in Project Management (CAPM) certification from
PMI, which validates the basic knowledge and understanding of project management principles and practices. The Professional in Business Analysis
¶ (PBA) certification from PMI, which validates the competence and experience of business analysts who work with projects and programs. The Agile Certified Practitioner (ACP) certification from PMI, which
¶ validates the competence and experience of project managers who use agile methodologies and practices in their projects. The PRINCE2 Practitioner certification from AXELOS, which validates the competence and experience
¶ of project managers who use the PRINCE2 method in their projects. The Master of> Project Management (MPM) degree from various universities, which provides advanced education and training in project management
¶ theories, methods, and tools. The Master of Business Administration (MBA) degree from various universities, which provides general education and training in business administration and management. The PMO Value Ring
¶ Certified Practitioner (PMO-CP) credential from the PMO Global Alliance, which validates the competence and experience of PMO professionals who use the PMO Value Ring methodology in their PMOs.

¶

12.3 Networking and Professional Organizations

Networking is the process of building and maintaining a network of professional contacts who can provide support, advice, information, opportunities, or referrals for one's career development and advancement. Networking can be done in various ways, such as attending events, conferences, seminars, or workshops; joining online forums, groups, or communities; exchanging business cards, emails, or messages; asking for introductions, recommendations, or endorsements; or engaging in social media, blogs, or podcasts.

Networking can bring many benefits for PMO professionals, such as:

¶ Learning new knowledge and skills from experts, mentors, peers, or colleagues.

¶ Sharing ideas, insights, experiences, or best practices with other PMO professionals.

¶ Getting feedback, suggestions, or solutions for one's PMO or project challenges or issues.

¶ Finding new opportunities or leads for one's PMO or project work or career advancement.

¶ Expanding one's visibility, reputation, or influence in the PMO or project management community or industry.

¶ Building trust, rapport, or collaboration with potential or existing PMO or project stakeholders, sponsors, clients, or partners.

To network effectively and efficiently, PMO professionals need to follow some basic principles and tips, such as:

¶ Define one's networking goals and objectives, and identify one's target network or audience.

¶ Research and select the most appropriate and relevant networking platforms, channels, or events for one's networking purposes.

¶ Prepare and practice one's self-introduction, elevator pitch, or value proposition, and highlight one's PMO or project achievements, skills, or interests.

¶ Initiate and maintain contact with one's network, and follow up on any promises, requests, or referrals.

¶ Be proactive, confident, and courteous, and show genuine interest and curiosity in others.

¶ Listen actively, ask open-ended questions, and provide value-added information or assistance.

¶ Be respectful, ethical, and professional, and avoid being pushy, aggressive, or self-centered.

¶ Keep track and update one's network, and acknowledge and appreciate any support or help received.

One of the best ways to network is to join and participate in professional organizations that are related to PMO and project management. Professional organizations are associations or groups that represent, promote, and> support

the interests, standards, and development of a specific profession or field. Some of the benefits of joining and participating in professional organizations are:

¶ Access to exclusive resources, publications, tools, or databases that can enhance one's PMO or project knowledge and skills.

¶ Opportunity to attend or speak at conferences, seminars, webinars, or workshops that can provide learning, networking, or recognition opportunities.

¶ Eligibility to apply for or receive certifications, credentials, awards, or scholarships that can validate or advance one's PMO or project competence and career.

¶ Ability to influence or contribute to the development or improvement of the PMO or project management standards, practices, or policies.

¶ Affiliation or identification with a reputable and recognized PMO or project management community or industry.

Some of the common and popular professional organizations for PMO and project management are:

¶ The Project Management Institute (PMI), which is the world's leading association for project management professionals, with over 600,000 members and credential holders in more than 200 countries. PMI offers various certifications, standards, publications, events, and chapters for project management and related fields.

¶ The International Project Management Association (IPMA), which is a federation of more than 70 national project management associations around the world. IPMA offers a four-level certification system, a competence baseline, a code of ethics, and an award program for project management excellence.

¶ The Association for Project Management (APM), which is the chartered body for the project management profession in the UK, with over 30,000 members and affiliates. APM offers various qualifications, publications, events, and branches for project management and related fields.

¶ The PMO Global Alliance, which is the largest global community of PMO professionals, with over 10,000 members in more than 100 countries. The PMO Global Alliance offers a PMO certification, a PMO maturity model, a PMO awards program, and a PMO online platform.

- The International Institute of Business Analysis (IIBA), which is the leading association for business analysis professionals, with over 29,000 members and credential holders in more than 120 countries. IIBA offers various certifications, standards, publications, events, and chapters for business analysis and related fields.

13. APPENDICES

This section provides some supplementary information and resources that can help project managers, PMO professionals, and business analysts in their roles and responsibilities. The appendices include a glossary of terms, additional resources, sample templates and tools, and references and further reading.

13.1 Glossary of Terms

This appendix defines some common terms and acronyms used in project management, PMO, and business analysis. The definitions are based on the standards and best practices of the APM, the PMO Global Alliance, and the IIBA.

¶ **APM:** Association for Project Management, the chartered body for the project management profession in the UK.

¶ **BAC:** Business Analysis Core Concept Model, a framework that describes the six fundamental concepts that underlie business analysis: change, need, solution, stakeholder, value, and context.

¶**BABOK:** A Guide to the Business Analysis Body of Knowledge, a publication that provides a comprehensive guide to the principles, practices, techniques, and competencies of business analysis.

¶ **BAU:** Business as usual, the normal operations and activities of an organization or a project.

¶ **CBA:** Cost-benefit analysis, a technique that compares the costs and benefits of a project or a solution to determine its feasibility and value.

¶ **CPE:** Continuous professional development, a process of maintaining and enhancing one's skills, knowledge, and competencies through learning activities, such as training, certification, mentoring, coaching, etc.

¶**CPD:** Chartered Project Professional, a designation awarded by the APM to project managers who demonstrate the highest level of competence and professionalism in project management.

¶ **CR:** Change request, a formal document that proposes a change to the scope, schedule, budget, quality, or any other aspect of a project or a solution.

¶ **ECBA:** Entry Certificate in Business Analysis, a certification offered by the IIBA to individuals who are new to business analysis or want to demonstrate their basic knowledge and understanding of business analysis.

¶ **MoSCoW:** A prioritization technique that categorizes the requirements or features of a project or a solution into four groups: must have, should have, could have, and won't have. **PMBOK:** A Guide to the Project Management
¶ Body of Knowledge, a
publication that provides a comprehensive guide to the standards,
processes, practices, and competencies of project management. **PMI:** Project
¶ Management Institute, a global association for project management professionals, with over 600,000 members and credential holders in more than 200 countries. **PMO:** Project management office, an organizational unit
¶ that provides
support, guidance, governance, and oversight to projects, programs, and
portfolios within an organization or a domain. **PMP:** Project Management
¶ Professional, a certification offered by the PMI to project managers who demonstrate the knowledge, skills, experience, and ethics of> project management. **PRINCE2:** Projects in Controlled Environments, a structured
¶ project management methodology that provides a set of principles, themes, processes, and roles for managing projects effectively. **RACI:** A matrix that defines the roles and responsibilities of the stakeholders involved in a
¶ project or a process, using four categories: responsible, accountable, consulted, and informed. **SMART:** A mnemonic that describes the characteristics of effective goals and objectives: specific, measurable, achievable, relevant, and time-bound.
¶ **SWOT:** A technique that analyzes the strengths, weaknesses, opportunities, and threats of a project, a solution, an organization, or a situation.
¶

13.2 Additional Resources

This appendix provides some additional resources that can help project managers, PMO professionals, and business analysts in their learning and development. The resources include websites, blogs, podcasts, webinars, forums, communities, and events related to project management, PMO, and business analysis.

¶**APM website:** [URL]/ - The official website of the APM, where you can find information about the APM qualifications, publications, events, branches, and membership benefits.

¶**PMO Global Alliance website:** [URL]/ - The official website of the PMO Global Alliance, where you can find information about the PMO certification,

maturity model, awards program, online platform, and membership benefits.

IIBA website: [URL]/ - The official website of the IIBA, where you can find information about the IIBA certifications, standards, publications, events, chapters, and membership benefits.

ProjectManagement.com: [URL]/ - A website that provides a variety of resources for project management professionals, such as articles, blogs, podcasts, webinars, templates, tools, and communities.

PMO Flashmob: [URL]/ - A website that organizes informal and social events for PMO professionals, such as meetups, workshops, conferences, and online sessions.

BATimes: [URL]/ - A website that provides a variety of resources for business analysis professionals, such as articles, blogs, podcasts, webinars, templates, tools, and communities.

13.3 Sample Templates and Tools

This appendix provides some sample templates and tools that can help project managers, PMO professionals, and business analysts in their work and deliverables. The templates and tools include documents, forms, checklists, charts, diagrams, and software applications related to project management, PMO, and business analysis.

Project Charter Template: A document that defines the purpose, scope, objectives, benefits, risks, assumptions, constraints, stakeholders, roles, responsibilities, authority, and governance of a project.

Stakeholder Register Template: A document> that identifies and analyzes the stakeholders involved in a project or a solution, including their names, roles, interests, expectations, influence, communication needs, and engagement strategies.

Requirements Document Template: A document that specifies the functional and non-functional requirements of a project or a solution, including their attributes, sources, dependencies, assumptions, validations, and prioritizations.

Risk Register Template: A document that records and tracks the risks associated with a project or a solution, including their descriptions, probabilities, impacts, ratings, responses, owners, and statuses.

- **Project Plan Template:** A document that outlines the scope, schedule, budget, quality, resources, communication, procurement, and stakeholder management plans of a project. **Status Report Template:** A document that summarizes the progress,
- performance, issues, and risks of a project or a solution, usually on a weekly or monthly basis. Lessons Learned Template: A document that captures the knowledge, experience, and feedback gained from a project or a solution, including what went well, what went wrong, and what can be improved for future projects or solutions. **Gantt Chart Tool:** A tool that creates a graphical representation of the tasks,
- durations, dependencies, and milestones of a project or a process, showing the start and end dates, the critical path, and the progress of each task. **PERT Chart Tool:** A tool that creates a graphical representation of the tasks,
- durations, dependencies, and uncertainties of a project or a process, showing the optimistic, pessimistic, and most likely estimates of each task and the expected completion time of the project or process. **WBS Tool:** A tool that creates a graphical representation of the work breakdown structure of a
- project or a process, showing the hierarchy and decomposition of the deliverables, activities, and resources required to complete the project or process.

  Use Case Diagram Tool: A tool that creates a graphical representation of
- the use cases and actors of a system or a solution, showing the interactions and relationships between them.

  ERD Tool: A tool that creates a graphical representation of the entities,
- attributes, and relationships of a database or a data model, showing the cardinality, optionality, and constraints of each relationship.

13.4 References and Further Reading

This appendix provides some references and further reading materials that can help project managers, PMO professionals, and business analysts in their research and knowledge. The references and further reading materials include books, journals, articles, reports, and standards related to project management, PMO, and business analysis.

- APM Body of Knowledge, 7th edition, APM, 2019 - A book that provides a comprehensive guide to the concepts, terms, techniques, and competencies of project management, based on the APM standards and best practices.
- PMO Value Ring Methodology, PMO Global Alliance, 2018 - A book that provides a comprehensive guide to the methodology, framework, and> tools for creating, managing, and measuring the value of PMOs, based on the PMO Global Alliance standards and best practices.
- A Guide to the Business Analysis Body of Knowledge (BABOK Guide), 3rd edition, IIBA, 2015 - A book that provides a comprehensive guide to the principles, practices, techniques, and competencies of business analysis, based on the IIBA standards and best practices.
- A Guide to the Project Management Body of Knowledge (PMBOK Guide), 6th edition, PMI, 2017 - A book that provides a comprehensive guide to the standards, processes, practices, and competencies of project management, based on the PMI standards and best practices.
- The Standard for Portfolio Management, 4th edition, PMI, 2017 - A book that provides a comprehensive guide to the standards, processes, practices, and competencies of portfolio management, based on the PMI standards and best practices.
- The Standard for Program Management, 4th edition, PMI, 2017 - A book that provides a comprehensive guide to the standards, processes, practices, and competencies of program management, based on the PMI standards and best practices.
- Managing Successful Projects with PRINCE2, 6th edition, AXELOS, 2017 - A book that provides a comprehensive guide to the methodology, principles, themes, processes, and roles of PRINCE2, based on the AXELOS standards and best practices.
- Project Management Journal, Wiley, ISSN: 8756-9728 - A peer-reviewed academic journal that publishes original research articles, reviews, case studies, and commentaries on project, program, and portfolio management and related fields.
- International Journal of Project Management, Elsevier, ISSN: 0263-7863 - A peer-reviewed academic journal that publishes original research articles, reviews, case studies, and commentaries on project, program, and portfolio management and related fields.

- Journal of Modern Project Management, PMO Global Alliance, ISSN: 2317-3963 - A peer-reviewed academic journal that publishes original research articles, reviews, case studies, and commentaries on project, program, and portfolio management and related fields. Business Analysis Journal, IIBA, ISSN: 1938-6478 - A peer-reviewed academic journal that publishes original research articles, reviews, case studies, and commentaries on business analysis and related fields. Pulse of the Profession, PMI, annual - A series of reports that provide insights and trends on the current state and future direction of project, program, and portfolio management and related fields, based on global surveys and interviews of practitioners and executives. PMO Benchmark Report, PMO Global Alliance, annual - A series of reports that provide insights and trends on the current state and future direction of PMOs and related fields, based on global surveys and interviews of practitioners and executives.
- State of the BA Profession, IIB> A, annual - A series of reports that provide insights and trends on the current state and future direction of business analysis and related fields, based on global surveys and interviews of practitioners and executives.

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