

## Advanced PM Office Management Solutions from PMOSoft *(for the technical PM office)*

### Introduction

Business and government PM offices (PMO) invest heavily in QA standards and PM collaboration systems (CS) in an effort to improve project quality and performance.

*Why do they do it?* It's simple,

- customer retention in a highly competitive market demands performance,
- QA standards represent the single globally accepted path to *consistent and improving project management performance and product quality*, and
- collaboration systems reduce overhead costs and *increase productivity*.

Take the final step and synchronize the CS to meet PMO standards, and the stage is set for world class performance. A simple but very effective formula that is the hallmark of the best in class PMO.

*So what's the catch?* The significant time and cost required for QA standards definition, implementation, and management can be prohibitive. Additionally, while QA standards are tailored to the specific needs of the PMO, one size fits all PM collaboration systems are not. Collaboration systems are expensive out of the box, with implementation costs, duration, and complexity increasing dramatically with configuration flexibility. As a result, synchronizing a standard with a collaboration system can be extremely challenging and expensive.

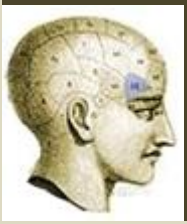
While well synchronized systems vastly improve performance, poorly synchronized systems have the opposite effect. For this reason, it's critical that PM organizations exhibit great care in platform selection. Otherwise, they face the specter of having spent a great deal of time and money only to end up worse off than they started.

*How can PMOSoft help?* By providing the expertise and tools needed to quickly establish a lean and well-synchronized standards and collaboration system, PMOSoft can quite simply, place any technical PM office on a path to world class performance in a matter of months.

PMIQ™, our QA synchronized PM collaboration system, can decrease both the time and cost to implement and operate a PMO QA system by more than 50%, and

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institutionalize the operational improvement mindset and mechanisms that characterize best in class PMO performance.

## Challenges facing the PMO

### *Defining the Mandate*

Managing projects is the job of project managers, but PMO leadership is responsible for ensuring a consistent and improving level of project management performance and product quality for all projects. This is the primary reason for the PMO to exist at all (its mandate).

In terms of ***project management***, the PMO is focused on how well each project is managed in terms of team effectiveness and with respect to plan versus actual comparisons surrounding scope, schedule, and budget.

In terms of ***product quality***, the PMO is focused on how well the final product of each project conforms to specifications, how it meets customer expectations, and how much rework/error correction is required following delivery. The PMO also works to assess and improve general customer satisfaction and identify specific areas of performance improvement/degradation that occur over time.

Understanding this mandate, the question becomes, how do best in class organizations fulfill it successfully? The answer is straight forward, tried, and true, but very challenging none-the-less.

### *Achieving the Mandate*

Compliance with well defined and comprehensive management standards is the single generally accepted method for establishing a consistent and improving level of performance for any organization. As a result, the PMO could be described as a quality assurance organization (where QA refers to process, not test).

If all PM's follow a single standard, then improving the standard will improve the performance of every PM across every project. If no standard exists, there is simply no way to achieve a consistent, much less improving, level of performance across the PMO. It follows then, that the success of the PMO is directly tied to the establishment of, and compliance to effective QA standards in a well managed quality management system (QMS).



The QMS is managed by the quality assurance (QA) team and comprised by a comprehensive collection of standards documents that govern two things, 1. how work gets done, and 2. how the standards themselves are complied with and improved over time.

A typical QMS contains project lifecycle, compliance (i.e. audit), document control, and process improvement procedures and templates. Project management activities are governed by lifecycle procedures while QA activities are governed by compliance, document control, and process improvement procedures which ensure ongoing performance against the adopted standard.

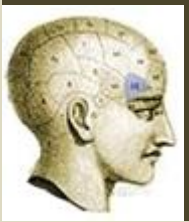
Conservatively, a startup QMS for a small PM office can take more than a year to implement with costs in excess of \$500,000+. Compliance management and process improvement will then add \$100,000+ to the annual QA budget depending on the size and complexity of the QMS and the degree to which automation (via management tools) reduces manual effort. Since most organizations implement their initial system from scratch, and manage it manually (without benefit of time saving tools), their annual maintenance budget will be much higher.

Management of a manual QMS can be very time consuming and error prone. In a manual QMS, documents, corrective and preventive actions, and audit plans and reports must be created and updated in flat files and stored manually in a user managed file system. All file and folder naming conventions and indexing must be written into governing procedures which must be read and followed by each user doing governed work. As a result, error rates, the size of related QA procedures, the level of user frustration, and QA administration effort are all elevated. It's not uncommon that team disdain for such a time intensive manual system will grow to the point that it threatens the very success of the QA standard.

Given the risk associated with a manual standards implementation, it becomes clear that effective QMS management applications are a necessary investment.

### *Surpassing Expectations*

While standards lay the foundation for achieving the PMO mandate, it is the addition of the collaboration system that increases team speed and productivity, setting the stage for performance-based competitive advantage. Promises are made by sales and product management teams, but promises are kept and



reputations built by PM teams. Nothing is as critical to customer satisfaction and loyalty (or future sales) as an efficient and high quality delivery experience at the hands of a truly professional PM organization.

An elegant, comprehensive, responsive, and always available PM collaboration system can reduce management of all QA and lifecycle activities to simple point and click operations. It can ensure that all program and project data is captured and stored in seamless compliance with PMO standards, cut the time to perform administrative tasks in half, and eliminate the need for the creation and maintenance of manual file systems.

A strong collaboration system will reduce, if not eliminate, process and user input errors, manual file/folder creation and management, indexing/naming convention issues, inconsistencies in management from project to project, the list goes on. Also, like standards, the CS helps to drive consistency in repeatable performance and establishes a common language amongst users, resulting in a PM office QA driven performance, as opposed to numerous individual PM team performances.

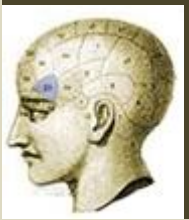
## Solution Options

### *QA Management*

While there are a host of enterprise document management platforms that meet the needs of QMS document control, most do not support equally critical process improvement or audit functions. In fact these systems aren't designed with the QMS in mind at all, but instead, for general enterprise wide document management.

This means standards users must leave the PMO environment and navigate through a general purpose system with its own unique structure, user interface, security, and administration. As a result document integration with PMIS applications will not be possible and added user and system administration and training will be required for all PMO administrators and users.

In contrast, PMIQ™ delivers a CS integrated QMS where all QA management activities are simplified to a few point and click operations. The responsive web applications enforce QMS procedure requirements through an intuitive user interface that reduces effort, prevents errors, and maintains thorough transaction



records within its enterprise class database system. To the delight of workers, the size of written procedures is reduced to a single page (in most cases) since many of the process steps are automated by the user interface, so they don't need to be written. QA document write access is limited to those users assigned document ownership/approval authority by the QA administrator, while read only access is granted to all QMS users at point of use in applications across the PMIQ system.

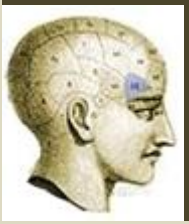
PMIQ™ QMS administration enforces version control in compliance with the requirements of any world class standard. A procedure may only be altered by its owner and built in workflow state machines ensure that no document is released until required review has been performed, and management and QA approvals have been made.

### *Collaboration Systems*

In terms of PM collaboration systems, there are also a number on the market, but none that tie QA system requirements to project information management tools and most are overly broad in terms of the types of projects they will support.

Without the ability to synchronize collaboration system functions with QA system requirements, collaboration system terminology, form, and function will often collide with written process. In fact, it can be extremely difficult for a PMO with existing standards to find a collaboration system that will work in concert with them. Many organizations will end up "putting the cart before the horse", by changing their standards to align with an off-the-shelf collaboration system in a feeble effort to force a workable end solution.

Most off-the-shelf CS platforms are generic in terms of the types of projects they support (to appeal to a larger market). These systems often include a great deal of functional content that a "technical PM office" will never use. As a result, system size and complexity ensure that every task will take longer to learn, every question will require more time to investigate, and large portions of the overall platform will go completely unused. One size fits all solutions never really fit all that well.



## How PMOSoft Can Help

### *Standards Definition & Management*

PMOSoft can help you design and vet standards to meet your specific PMO goals, align those standards to your existing methods and practices, and provide development, implementation, and change leadership to ensure your immediate and long term success. Our deep expertise, existing standards IP, and lean approach will reduce cost and time frame requirements. We can either establish a standalone system of standards or integrate them into PMIQ™ (see next section) to form a comprehensive automated PM office management system to maximize performance.

In terms of ongoing standards document and compliance management, we can help you avoid the costs associated with full time dedicated QA employees through a permanent part time service agreement, or train your direct employees to provide that support in-house.

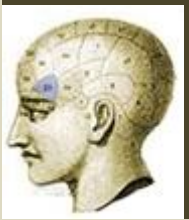
Standards form the key requirement needed to meet the PMO mandate, but QA expertise isn't a key PM competency for most PMO's. No problem, that's why PMOSoft was formed, and our experts are here whenever you need us and for as long as you need us to offer full time or part time support.

### *PM Information & Quality (PMIQ™) Management System*

PMOSoft is also able to offer a comprehensive information (aka collaboration) and quality management system (PMIQ™) that synchronizes standards and project information management in a single package. The system delivers with a full suite of common PM procedures that can then evolve as you learn.

PMIQ™ can spring board your team to consistent and repeatable performance in a fraction of the time and cost associated with traditional consulting engagements. This is accomplished by delivering a comprehensive suite of fully functional and integrated QMS procedures and PM web applications right out of the box (ready to use).

The key to establishing the integrated baseline system, is the identification of the subset of PMO procedures that are truly common (required by all technical PMO's)



and limiting their content to the minimum set of requirements. This reduces the likelihood of waste given that each procedure is 100% editable so client PMO teams can improve (or replace) each as required by ongoing QMS improvement efforts.

Some examples of PMIQ integrated procedures and applications are shown below (*not an exhaustive list*):

#### **Procedure Documents**

QMS Document Control  
QMS Corrective/Preventive Actions  
QMS Lessons Learned  
Program Requirements Management  
Project Change Management  
Project Escalation Management  
Project Milestone Management  
Project Deliverable Management  
Project Risk Management  
Project Issue Management  
Project Action Management

#### **Web applications**

QA Document Admin  
CAR Admin  
Lessons Learned Admin  
Requirements Admin  
Change Admin  
Escalations Admin  
Milestones Admin  
Deliverables Admin  
Risk Items Admin  
Issues Admin  
Actions Admin

Every PM office manages the work represented by the listed pairs above. PMIQ™ delivers a basic initial process with a full featured application to establish an operational baseline QA framework. The client PMO may then adopt the process as is, make changes/improvements, or replace it entirely based on their own unique requirements and priorities.

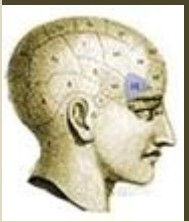
Key benefits:

Reduced time and cost to implement QA standards (> 50%)

- Cost avoidance in excess of \$250,000.00
- Implementation duration reduced by as much as 3-6 months

Reduced cost of ongoing standards compliance verification (> 50%)

- PMIQ web applications enforce quality steps and automate the capture of audit artifacts
- PMIQ reports provide indexing and immediate access to any project artifacts requested by auditors
- Most audits can be handled directly by QA staff without requiring interviews of PM team members



Improved project management cost, speed, quality, and reputation driven by

- QA standards compliance
- Fast and friendly data management applications
- Automated real time reporting to all stakeholders

Continuous PM performance improvement

- *Corrective & Preventive Action methods & web apps*
- *Lessons Learned methods & web apps*
- *QA document control methods & web apps*

## Executive Management and Stakeholders Benefits

PMOSoft can help executives take control of project performance by engineering consistency and efficiency in project execution through synchronized standards and collaboration systems. An engineered PM office environment provides PMO management with the knobs and dials needed to tune performance.

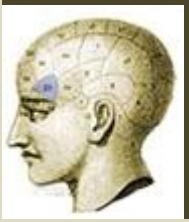
PMOSoft standards experts draw on existing IP and deep organizational, process, and change management skills to craft baseline standards that will place your PMO on a path to consistent quality and improving performance in fulfillment of the PMO mandate. A complete solution and the knowledge to evolve it as your business grows.

PMIQ™ enables management and stakeholder collaboration through real time reporting that provides real time status and health information for every milestone, deliverable, activity, task, risk, issue, action, etc..., underway in each project and program.

- Applies to apples project metrics support a better grasp of true performance project over project
- Remain on top of ongoing projects via quick and easy access to program and project summary reports and dashboards with the ability to drill down where issues and exposures require a deeper dive.
- Make PMIQ a selling point with customers as proof of your commitment to excellence and your ability to deliver the highest levels of quality and service (true competitive advantage)

## Executive summary

World class PMO's synchronize their collaboration system with standards to



increase consistency and improve team productivity. While understanding this requirement is important, achieving the outcome is not, and a poor outcome could be catastrophic for your PMO. PMOSoft is uniquely positioned to deliver the expertise, baseline standards, and collaboration tools needed to take your technical PMO all the way to CMMI level 5.

*Contact us today at 469.941.0270 or visit us on the web at <http://pmosoft.com> for further details. At PMOSoft, we're out to deliver the promise of project management excellence one PM office at a time.*