



Start small, think big – PMO Transformation Strategy at an Top U.S. Healthcare Provider

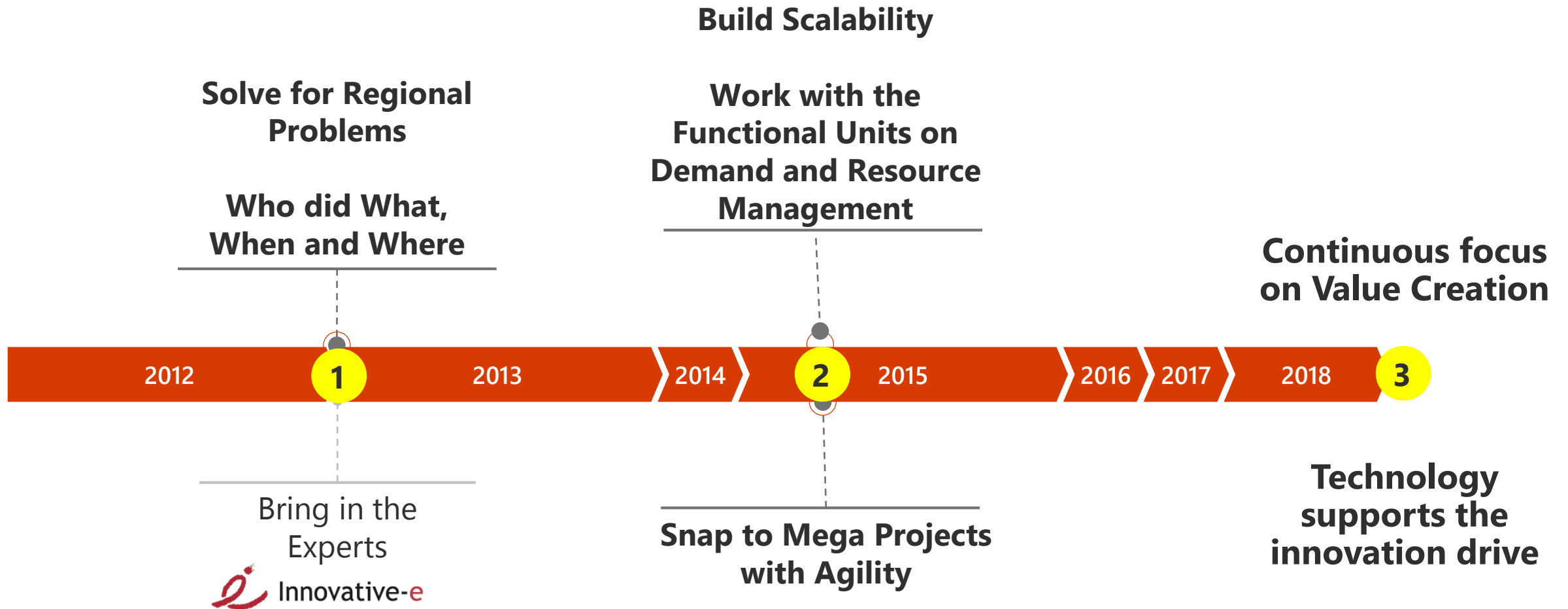


Case enterprise details



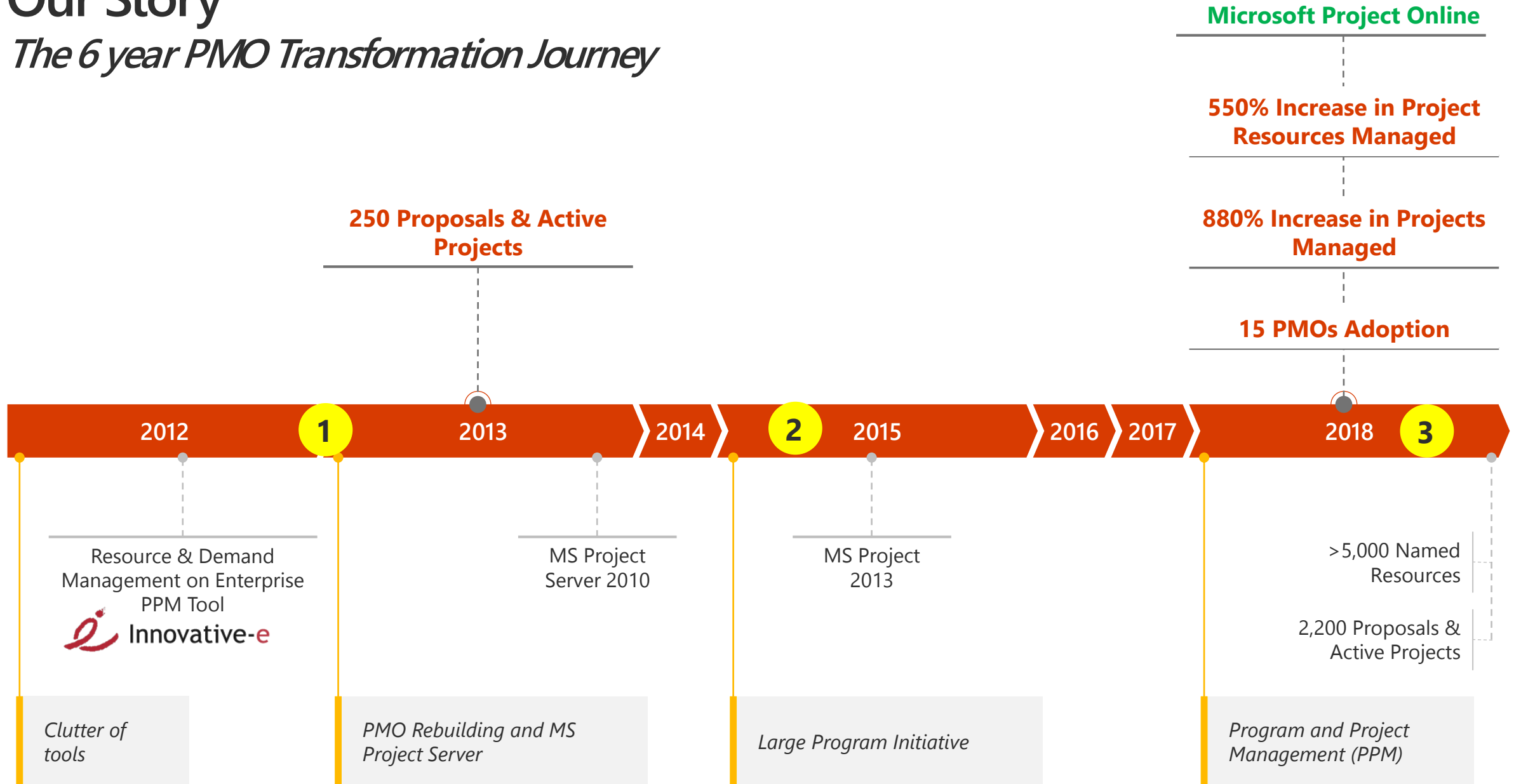
Our Story

From the Transformation Vision to the Realization of it.

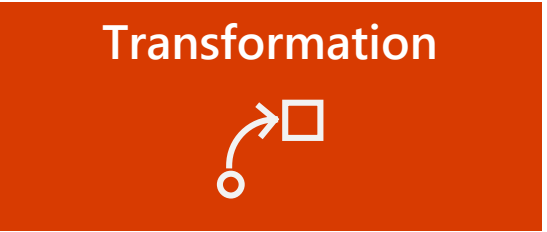


Our Story

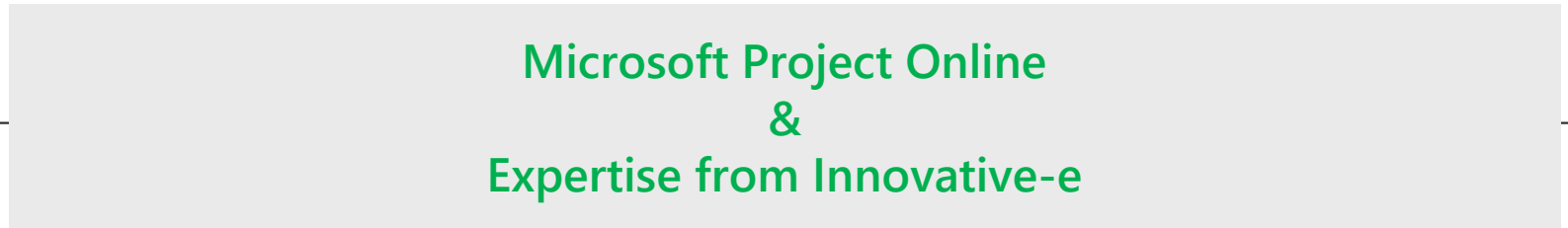
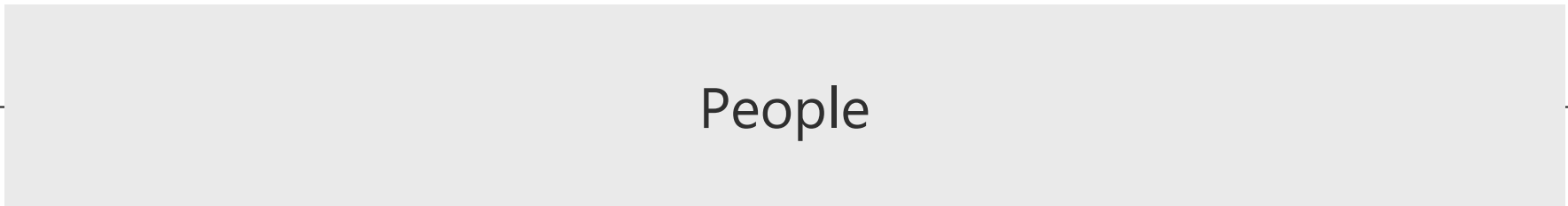
The 6 year PMO Transformation Journey



Strategy →



Benefits





Identification

People

Process

Technology

Identification



People

- Core PMO responsibilities & scope across our Region
- Skill gaps
- Resource constraints to support volume of activity
- Delivery & Quality



Process

- Regional Governance
- Intake & Demand Management
- Resource Management
- Portfolio, Program & Project Management



Technology

- Too many & inconsistent tool set usage
- Lack of ability to share knowledge
- Self reported metrics
- Real time, accurate information



Mission

Governance Structure

PM Tools Standardization

Centralized Resource Management

Project Prioritization & Transparency

Data Insights Driven Executive Reporting

Identification – People

PM Distribution Industry Standard is **60%** for Complex, **30%** for Small & **10%** on Mid-sized Projects

PM distribution **14%** on Complex, **39%** on Small & **47%** on Mid-sized Projects

Resource Optimization at the PM level became the first goal..

	Low Risk, Enhancement/Small Projects		Complex, High Risk, Political – Mega Projects
Project Characteristics	<ul style="list-style-type: none"> High organizational familiarity with project type Well-understood scope Familiar technology 		<ul style="list-style-type: none"> Large strategic impact Uncharted territory0new project type, new technology Many dependent projects
Desired Project Outcomes	<ul style="list-style-type: none"> Predictable execution/on-time, on-budget delivery Risk minimization Compliance and audit requirement adherence 		<ul style="list-style-type: none"> Business value maximization Expanding organizational competency in new terrains
Sources of Risk	<ul style="list-style-type: none"> Execution risk Compliance risk 		<ul style="list-style-type: none"> Business risk “Headline” risk Technology risk
Industry Standard %Total PM Distribution	30% of PMs	10% of PMs	60% of PMs
PMO IT Focused PMs	45% (10 PMs)	41% (9 PMs)	14% (3 PMs)
PMO Business Focused PMs	16% (1 PM)	68% (4 PMs)	16% (1 PM)
PMO PMs – Total	39% (11 PMs)	47% (13 PMs)	14% (4 PMs)

Identification – Process & Technology

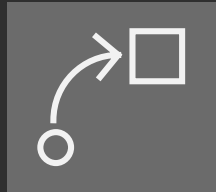
Going from **a number of Tools and Technologies** to deliver PMO Processes

SharePoint
Local MS Project Files
Resource Management in Shared Files
Various Tools and **Multiple Locations**



Enterprise Project Management with Microsoft Project and SharePoint

PMO Processes & Deliverables	Original State		Current State
Detail project information	SharePoint	↻	Project Server/Online
Project plans	MS Project – Local		
Project issues and risks list	Various tools & locations		
Project financial reports	Various tools & locations		
Demand and resource management	Managed on shared drive (not actual project plans)		
Project health information	Limited/inconsistent data, various		
Project documents collaboration	SharePoint	✓	SharePoint
Project pipeline information	Various lists & locations	↻	Project Server/Online
Portfolio information	SharePoint		
Project intake information	Various tools & locations		



Transformation

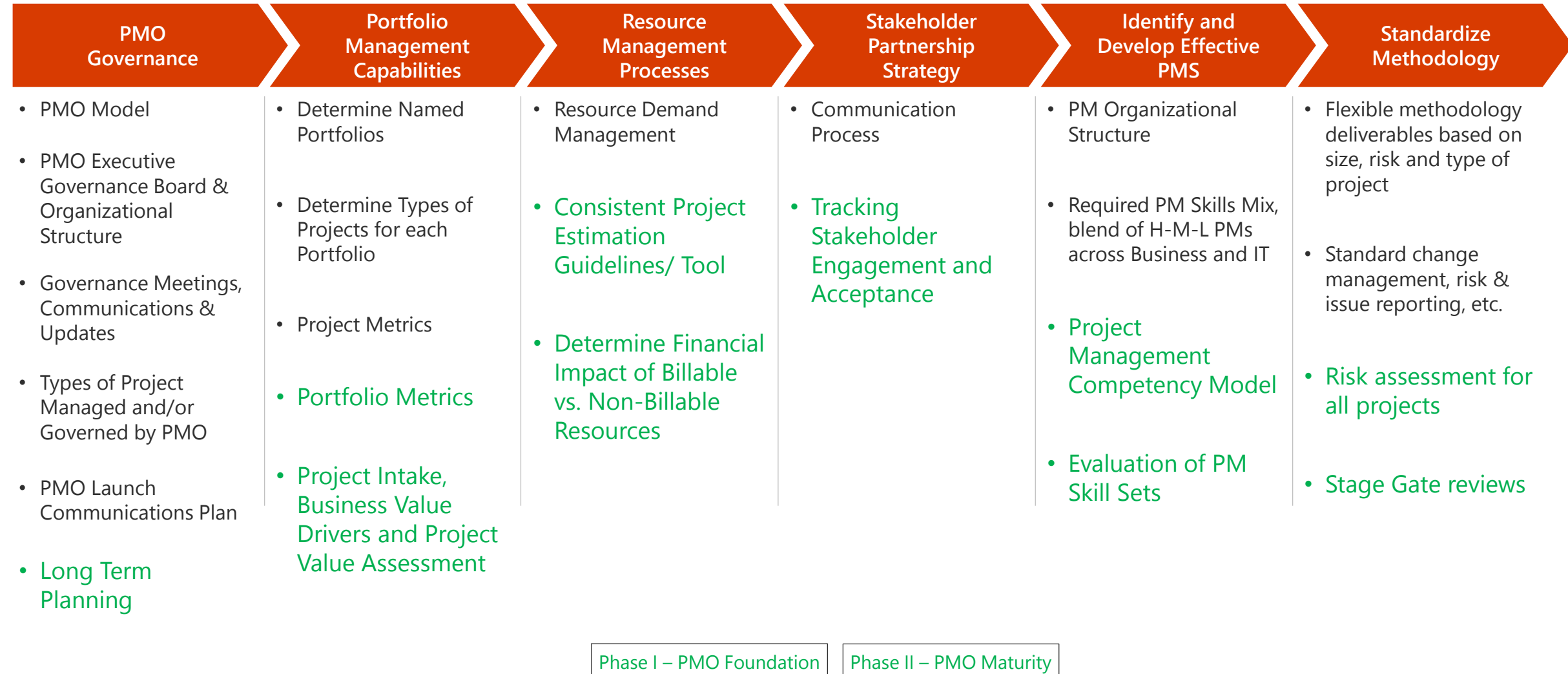
The Plan

High Level Strategy

MS Online

Transformation – High Level Strategy

PMO Launch Activities



Transformation – The Plan

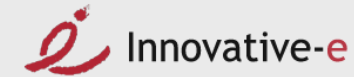
Robust Functionality

Simple, targeted value, local focus with enterprise scalability



Partnership

Bringing in the SMEs and Leveraging best practices



Intake, Assessment
& Estimation

Project Plan
& Project Information

Demand & Resource
Management

Integrated RAIDS
Tracking

PMO, Project and
Resource Department
Financial Reporting

• Adoption Agility

- Foundation operational in ~30 days
- RBS Structure – Flexibility & Scalability
- Portfolio Selection/Analyzer
- Reporting/BI & Analysis

• Continuous Incremental Success

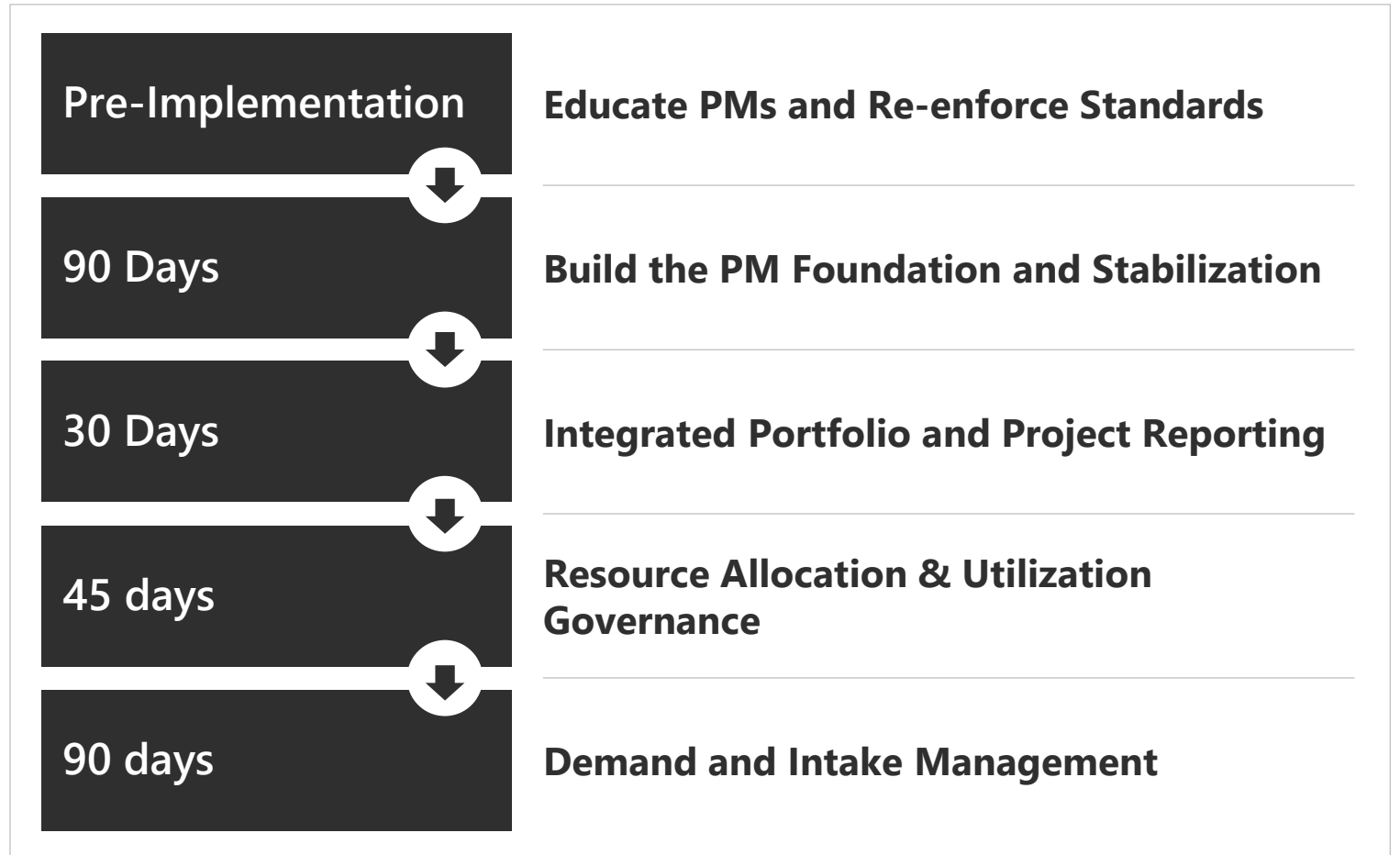
- Multiple upgrades and expansions
- Migration to Project Online and enhancements
- Standards, Process & Training for multiple iterations of growth and expansion
- Ongoing partnership as business and technology needs continue to evolve

Transformation – A 10 month Adoption Journey

A Timephased Transformation Approach

Covering

- Enablement
- PM Foundation
- Integrated Portfolio Reporting
- Resource Governance
- Intake Management





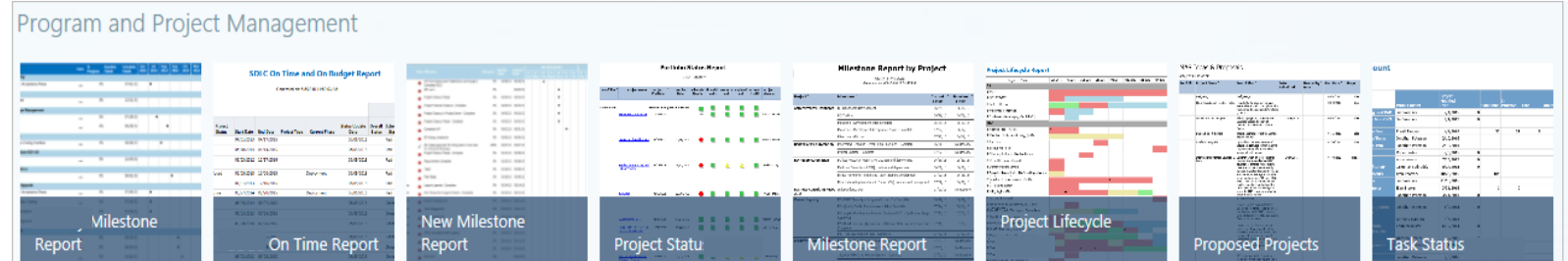
Innovation

Innovation & Value

Putting Technology to the task

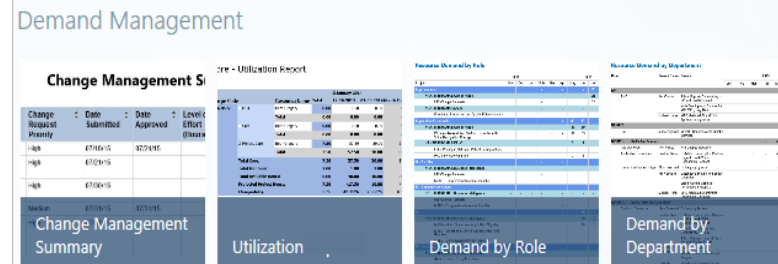
Program and Project Management

- Weekly Milestone Report
- SDLC On-time Report
- New Milestone Report
- Project Life Cycle Report .. Etc..



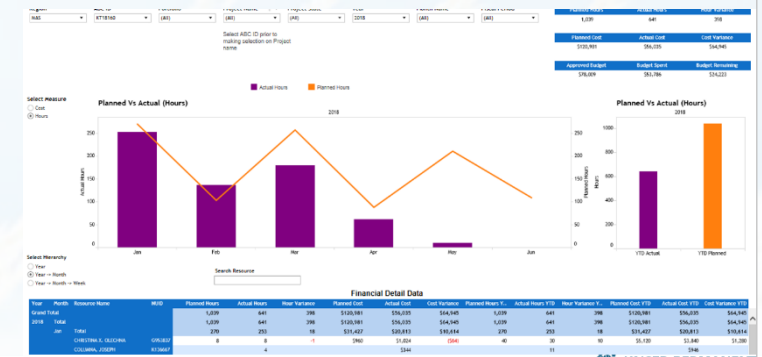
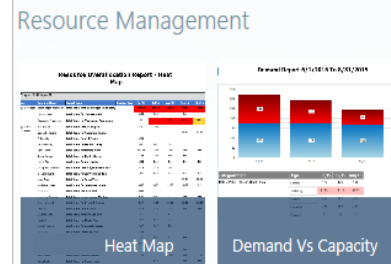
Demand Management

- Change Management Summary
- Utilization Report
- Demand by Role
- Demand by Department



Resource Management

- Resource Heat Map
- Demand Vs Capacity



Innovation & Value – Reporting for Anybody, Anytime, Anywhere



Features

Real Time, fully automated, fact / system driven data, links to detailed status report



Benefits

\$60k Labor Savings Annually



Value

Consistent & repeatable format/content for all consumers enterprise wide

Multiple Portfolios

5/17/2018 9:43:19 AM

Project End Date	Go-Live Date	Schedule Health	Financial Health	Resource Health	Region Health
Number of Projects in Portfolio: 10					
Number of Projects in Portfolio: 32					
Number of Projects in Portfolio: 24					
Number of Projects in Portfolio: 26					
05/15/2018	03/01/2018				
08/14/2018	06/08/2018				
12/31/2018	06/13/2018				
05/21/2018	01/30/2018				
12/31/2018	06/29/2018				
01/31/2019	01/15/2019				

Innovation & Value – Portfolio & Project Status Reporting



Features

Real Time, automated calculations & data pulls from schedule, RAIDs, project data, etc.



Benefits

\$260k Savings Annually



Value

Consistent & repeatable format/content for all consumers enterprise wide

Project Status Report for Reporting Period: 05/19/2018

Project Information:	
Project Name:	Enhancement
Project Manager:	Vi
Business Owner:	Al
Business Segment Partner:	Jc on
Current Phase:	Waterfall.Dev-Build
Estimated Project Completion Date:	08/28/2018
Description:	Background:

Overall Project Health:	
National Health	
Regional Health	
Project Schedule Health	
Financial Health	
Resource Health	

Innovation & Value – Demand vs Capacity Reporting



Features

Real Time, automated Generic and named resource demand – proposals and project schedules



Benefits

- 3 Month ROI
- \$100k Savings Annually

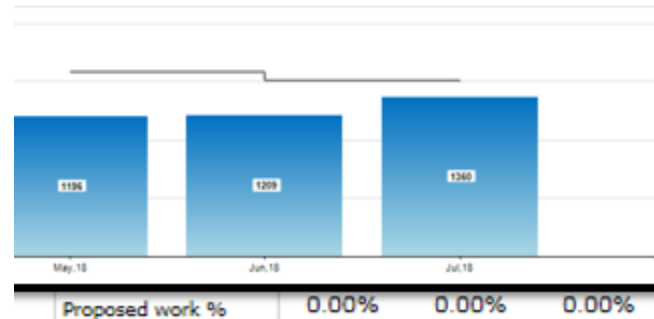


Value

Consistent, fact driven data for immediate decision making

Type	May,18	Jun,18	Jul,18
Capacity	1584	1512	1512
Availability	388	303	152
Demand	1196	1209	1360
Capacity		0	0
Availability		(19)	(101)
Demand		19	101
Committed		19	19
Committed			42
Committed			40
Allocated work %	0.00%	0.00%	0.00%
Capacity	176	168	168
Availability	5	9	(7)
Demand	171	159	175

Demand Report 5/1/2018 To 7/31/2018



Innovation & Value – Integrated Financial Dashboard



Features

Near real time integration of multiple data sources for automated project burn, month end close and department level forecasting



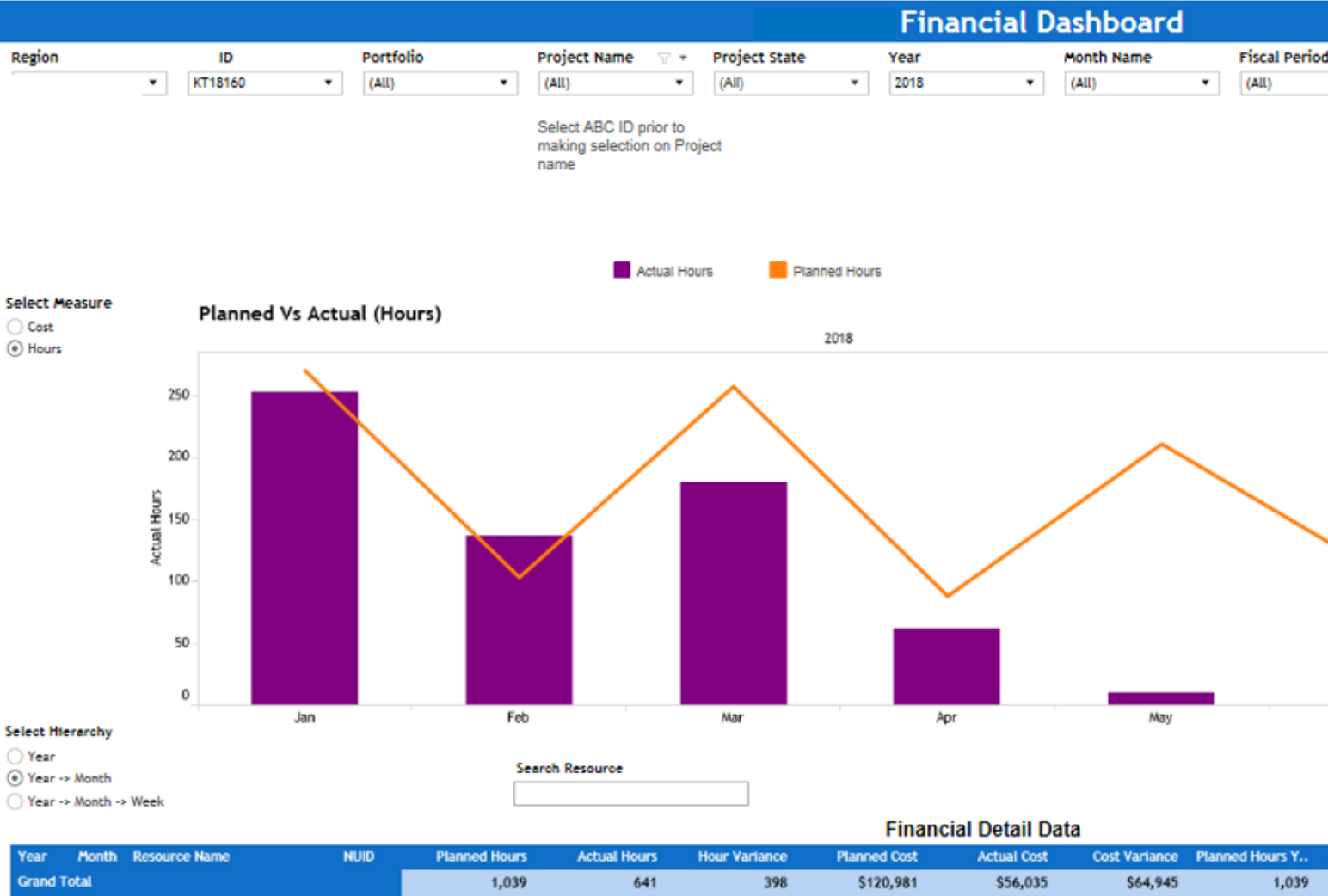
Benefits

Target 600k annually



Value

Fully automated, fact driven project and accounting level forecasting



Mission Achieved

Consolidation, Consistency
& Standardization

Improved Resource &
Demand Forecasting Accuracy



Benefits Realized

Benefits Realized

Consolidation, Consistency & Project Management Effectiveness

- **2 Primary Systems** & 12 Core Processes
- More accurate and **up to date** project scheduling
- **Portfolio Level** awareness and **insight**
- **92% on time on budget delivery**

Increased Productivity

- **Automation and integration** of standard PM deliverables
- Reporting, information that took hours to assemble now **available on demand**

Improved Resource & Demand Forecasting Accuracy

- **Accuracy** of resource demand & "overhead" forecasts **improved from +/- 35% to +/- 5%**

Enhanced Transparency & Visibility

- **Fewer surprises** on projects
- Everyone looking at same information, **less confusion**
- Fact-based **Executive level** decisions
- **Data driven** vs self reported metrics

Thank You