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A Whole New PMO:

Building-out St Cloud State University's PMO

Joe Perzel, PMP & Jodi Wroblewski, PMP

Dec 11 and 12, 2019



joe@jperzelinc.com - 612.801.0737 www.jperzelinc.com
<https://www.linkedin.com/in/jperzel>



Agenda

- Introductions and Background
- Major Drivers
- Initial Milestones & Resources
- What was Accomplished
- Looking Back
- Updates since 2016
- Summary



Administrivia

- Cell phones on stun
- If you need to stand-up, step out or walk around – please do so
- Bathrooms are ...
- Questions and sharing are encouraged, and rewarded
- Show respect – active listening and disagree with the idea not the person
- We may “park” a topic to help us stay on task
- More information in Addendum when you see a @
- Evaluation at end – please fill-out and comment
 - Content
 - Delivery
 - Examples
 - Anything else

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Introduction and Background

Project Management Background

- Project Management since 1982
- In Management Leadership position since 1983
 - ✓ 18 Years in Corporate
 - ✓ 3 Years in Non-profit
 - ✓ 2 Years in Government
 - ✓ 17 Years in Consulting & Staffing
 - ✓ Worked in Government, HealthCare, K-12, Higher-Education, Agri-business, Financial, Services, Manufacturing, Insurance, Consulting, Software, Audit/Compliance
 - ✓ Set-up PMO and Programs for multiple organizations both as manager within the organization and as an external consultant



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My Background

Some of the Larger, More Complex Projects

- Seven month project to create and roll out a family of business products for a healthcare company
- Managing the 2 year rewrite of a custom Sales and Marketing automation system for a global reinsurance company
- The development of a PMO office and corresponding policies, processes and artifacts for a Higher Ed organization
- The design and implementation of a data center move for a Fortune 500 company to an out of state location requiring no business hours downtime
- Planning, RFP creation, product selection, deployment and support of a 3 year ITIL and monitoring operations system for a company requiring 99.96% uptime
- The package selection, customization and deployment of all infrastructure, back-office and on-site systems for a 20-location, Fortune 500 distribution business
- The 3-year custom development project to design and create a multi-state workers compensation system that would be available for future “sale”



My Background – Joe Perzel

Some of my presentations include:

- How to be a Chameleon, a Key to Enterprise Project Success
- Top Ten Ways to Screw-up a Good Project
- How to Train your Dragon, a Project Sponsor Primer
- Managing Change and Surviving to Talk about it
- Yes, And... Advanced Negotiations in a Project World
- The Art of Selling and Salesmanship: Tools Everyone Needs to Utilize
- Surefire Scheduling
- Managing Innovation: When Thinking out-of-the-box is Required

This should tell you a couple of things...

- I find titles market & attract attention which leads to project success
- I can be irreverent, sarcastic and love debates; so comments and other opinions are appreciated
- I focus on the soft skills in project management



Introduction and Background

Goal for today

- Review the experiences – good & where there were areas for improvement – on the planning, execution and on-going operations for the PMO
 - ✓ We will do that by presenting content, engaging in a dialogue and supporting my points with examples from the engagement
 - ✓ And offering a bit of humor along the way
 - ✓ Evaluation at end – please fill-out and comment



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My Background – Jodi Wroblewski

- Worked in Project Management for approx. 15 years
- Certified Project Management Professional offered by the Project Management Institute
- Guest speaker for PMI.org and MnSCU on project management
- Developed a PMO office and corresponding policies, processes and artifacts for a Higher Ed organization
- Developed a PMO office and corresponding policies, processes and artifacts for an IT organization
- Worked in various roles and leadership in the following industries: software engineering, engineering, higher education, non-profit, and Infrastructure as a Service (IaaS)
- Conducted Strategic Planning Sessions for higher education organizations
- My philosophy: The 3 Ps to Passion [People + Potential + Progress = Passion]

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Introduction and Background



- Who here is a Portfolio Manager? Program Manger? Project Manager? Other organization roles?
- Who here is worked public sector? No-profit? Corporate?
- Who here has some level of PMO already in place? Department? Enterprise?
- Who has over 5 yrs. of Project experience?
- Who here enjoys the struggles of the politics of running a PMO?
- Who here has set-up the PMO and then have it take a “left turn” and become “interesting”?

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A Whole New PMO

Any QUESTIONS



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Building-out SCSU's PMO

PMO Defined:

- A **project management office (PMO)** is a management structure that standardizes the project-related governance processes and facilitates the sharing of resources, methodologies, tool and techniques.
- The responsibilities of a PMO can range from providing project management support functions to actually being responsible for the direct management of one or more projects.
- Several types of PMOs – each with a varying degree of control and influence.



Project Management Body of Knowledge (PMBOK Guide) 5th addition definition.

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View of PMO/Portfolio Management

Mechanics:

- Set-up/Creation
 - ✓ Stakeholder Analysis & Interviews
 - ✓ Policy/Procedures
 - ✓ Templates and Artifacts
 - ✓ Metric Definition
- Enforcement
 - ✓ Portfolio, Program and Project Reporting
 - ✓ Metric Tracking
 - ✓ Targeted Communication

Execution:

- Running project and programs
- Overseeing project management corps

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Building-out SCSU's PMO

Introductions and Background

- The University
- The Department
- The Need
- The Players
- 3 projects at the same time



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A Building-out SCSU's PMO

Major Drivers:

- Lack of process and procedures
- To tell ITS' story to executives
- Manage project workflow and workload
- Budget changes



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Building-out SCSU's PMO

Initial Milestones & Resources:

- ITS Leadership organized and all on the same page and developed a plan of attack:
 - Start-up: Collaboration site [Jan-Feb \(2015\)](#)
 - PMO Governance: Develop Charter, clarify roles, sync the team, etc. [Jan-May](#)
 - Project planning: ownership and alignment [Mar-Jul](#)
 - Project Intake: planning [Jul-Aug](#)
 - Workflows: Intake, Exception & Change management [Aug-Sep](#)
 - Communication and socialization plan [May – Oct](#)
 - Project governance: campus buy-in [Aug-Nov](#)
 - Project Intake: Cycle 1 analysis [Sept-Nov](#)
 - Project prioritization: ITS, IT Adv and President's Council [Nov-Dec](#)
 - Cycle 0: clean-up projects in-progress [Sept – Dec](#)
 - Cycle 1 kick-off [Jan \(2016\)](#)



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A Building-out SCSU PMO: Next Steps

Proposed Roll-out: Initial Plan

- 2nd Cycle
 - Cycle 2 kick-off: [Aug \(2016\)](#)
 - Cycle 2 combined with Cycle 3 – [Nov 2016](#)
 - Cycle 2 project intake & planning: [Nov 2016 – Jan 2017](#)
 - Cycle 2/3 completion: [June 2017](#)
- Next Areas of Focus
 - Resource Time Tracking: [On-going](#)
 - Intake alignment w/enterprise budget process – [Jan 2017](#)
 - Cycle 4 prioritization – [May 2017](#)
 - Cycle 4 kick off – [July 2017](#)
- Inevitable Change
 - Gap and SWOT analysis: [Jun-Jul 2017](#)
 - Strategy and Tactics planning: [Jul-Aug 2017](#)
 - Roles and Responsibilities: [Jul-Aug](#)
 - Focus on Operations & other Non-Dev areas
 - Change in University Leadership & Impact on ITS

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A Whole New PMO

What Really Happened Next:

- Many High Level Leadership Changes
- PMO team member changes
- Intake cadence changed
- Recommendations by IT only
- Increased emphasis on Strategic Plan for projects
- Process being reviewed / updated



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What Has Been Accomplished... First Steps

- Developed Project Governance
- Time Tracking and Capacity Snap-shot
- Gathered comprehensive project list
- Developed Prioritization and Exception Workflow
- Developed Artifacts for Intake & Execution
- Kicked-off and executed Process
 - ✓ Intake, Scored and Ranked projects
 - ✓ Projects prioritized
 - ✓ Execution in progress
- Lessons learned sessions held



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What Has Been Accomplished-Benefits



- Campus has been socialized
- Capacity planning exists
- PMO governance in place
- Exception process tested
- President's Council engaged & reengaged
- Standard Artifacts in place
- PMO visibility across campus
- Process aligned to campus budget process

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Looking Back: What went well

- General acknowledgment of what a Project is and how it differs from a process
- ~~Knowing the ITS Dept's capacity~~
- Know what is being worked on
- Campus is aware of the new process
- Executive buy-in
- Brought ITS team together
- Decisions on project work – collaboration with ITS
- VP's knowledge of IT needs
 - ✓ Keep the momentum going
 - ✓ Be Flexible in approach
 - ✓ Be Flexible in methodology and tools

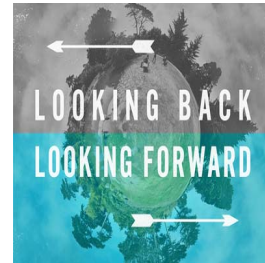


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Looking Forward:

- Changing processes from lessons learned
- Deploying Portfolio Management Software
- Improved Project portfolio reporting
- Improve Change Management processes
- Implementing Project Methodology Approach (Agile)
- Continue Artifact training
- Review Processes for other areas
 - ✓ Operations & Support
 - ✓ Roles and Responsibilities refined
- Adapt and pivot
 - ✓ Continued discussion to improve



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Looking Back: What To Improve On

- Timelines stressed – plan for some slack time
- Improve quality project submittals
- Estimating still needs to be refined
- ~~Time tracking — from beginning~~
- When resource planning account for:
 - ✓ projects already in progress that will continue through 1st cycle
 - ✓ project resources don't all engage at the same time
- Squeeze out back door access to resources

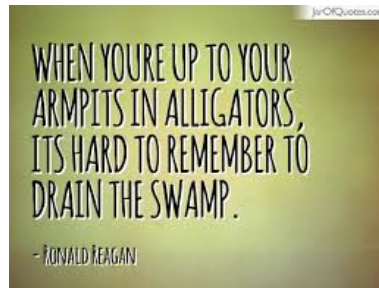


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Looking Back: What To Improve On

- Improving PMO management tools
- Plan for the unavoidable push-back that occurs
- Adapt when governance roles change – how to keep momentum
- Plan for Change – recognize it will happen
- Focus on repeatable cadence once processes are in place



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A Whole New PMO - Summary

- Timing was right to create the PMO
- Many new opportunities now that ITS tell its story
- It takes both the mechanics and the execution to be successful
- Have a Plan and execute the Plan
- Remember the politics
- Keeping the lights on trumps all
- If you only learn a few things today.....
 - ✓ Building the PMO is an iterative process
 - ✓ Identify your risks and mitigation strategies
 - ✓ You need to be flexible - when both good things and bad things happen

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Questions, Evaluations & 1 Lesson Learned



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Email Joe to offer feedback or request a full copy of any presentation

Project Management Essentials

- ✓ Project Management for the Beginner – the minimum you need to know to thrive
- ✓ The PM/BA Conundrum
- ✓ Building your Essential PM Soft skills
- ✓ Top Ten Ways to Screw-up a Good Project
- ✓ Using MS Project – the minimum you need to know to thrive

The Dark Arts of Project Management Series

- ✓ The Dark Arts of Project Management: Influence and Politics
- ✓ Yes, And... Advanced Negotiations in a Project World
- ✓ How to be a Chameleon: a Key to Enterprise Project Success
- ✓ How to Train Your Dragon: a Project Sponsor Primer
- ✓ Project Stakeholders: Dealing with Sleeping Giants to Saboteurs
- ✓ The Art of Sales and Selling: Tools & Techniques Everyone Needs to Know
- ✓ Selling the Value of the PMO and Project Management
- ✓ A “Surefire” way to Ensure Schedule Performance!
- ✓ Managing Change and Surviving to Talk about it
- ✓ Managing Innovation in a Project Management World

Case Studies

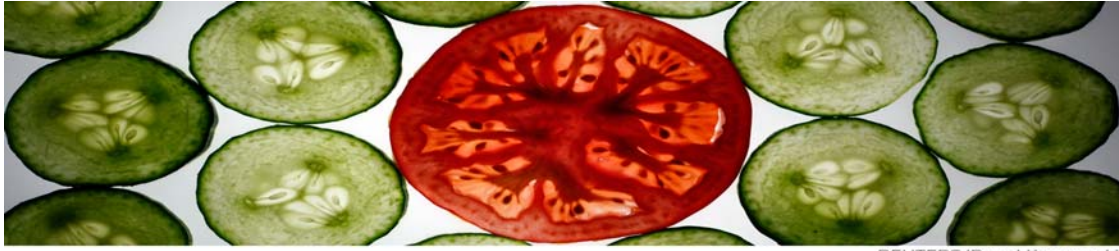
- ✓ Best Practices in Building out a Security Program
- ✓ Building out SCSU's PMO
- ✓ itSMF ITIL Deployment

joe@jperzelinc.com - 612.801.0737

<https://www.linkedin.com/in/jperzel>

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Joe Perzel, PMP & Jodi Wroblewski, PMP

Thank you!

Please take a moment to fill out the evaluation.



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A Whole New PMO

Contact Information:

Joe Perzel, PMP

joe@jperzelinc.com

<https://www.linkedin.com/in/jperzel>

612.801.0737

Jodi Wroblewski, PMP

<https://www.linkedin.com/in/jodiwroblewski/>

763-228-0917

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Addendum

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Table 2-1. Influence of Organizational Structures on Projects

Organization Structure Project Characteristics	Functional	Matrix			Projectized
		Weak Matrix	Balanced Matrix	Strong Matrix	
Project Manager's Authority	Little or None	Low	Low to Moderate	Moderate to High	High to Almost Total
Resource Availability	Little or None	Low	Low to Moderate	Moderate to High	High to Almost Total
Who manages the project budget	Functional Manager	Functional Manager	Mixed	Project Manager	Project Manager
Project Manager's Role	Part-time	Part-time	Full-time	Full-time	Full-time
Project Management Administrative Staff	Part-time	Part-time	Part-time	Full-time	Full-time

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