

## Increase PMO Collaboration to Improve IT Portfolio Management

Presented by Keith Ciocco and Laura Zuber

## Speaker



**Keith Ciocco,  
Vice President**

Keith Ciocco has more than 30 years of experience working in customer service, with 24 of those years spent at QSM. As Vice President, his primary responsibilities include supporting the QSM client base with their software measurement goals, managing business development, and managing existing client relations. He has developed and directed the implementation of the sales and customer retention process within QSM and has played a leading role in increasing the size of its customer base.



## Speaker



**Laura Zuber,**  
**Lead Support Representative and Instructor, CSM, SA**

Laura Zuber has 25 years of experience in software development consulting, training, and support. She has conducted training and coaching sessions for all QSM SLIM-Suite tools and helped customers implement SLIM across a wide variety of processes and platforms. Laura has managed software development projects, served as a senior software process improvement specialist, performed process assessments, designed and implemented best practices, and authored numerous training programs. She is a Certified Scrum Master and SAFe Agilist.

Thank you, Elisabeth and thank all of you who have taken time to join us today.

## PPM and the PMO

The Intelligence behind Successful Software Projects

Project Portfolio Management (PPM) refers to a process used by project managers and Project Management Organizations (PMOs) to **analyze the potential return on undertaking a project. ...** Project portfolio management gives organizations and managers the **ability to see the big picture.**



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As the lead instructor at QSM, I always define terms that people probably use all of the time may not have a full appreciation of their meaning, like constraints for example. It was helpful to me to understand that .....

The Project Management Institute has a lot to say about Project Portfolio Management (PPM) and Project Management Organizations (PMO).

There are at least 3 standards as shown here, along with practice guides on Implementing Organizational Project Management and Governance of Portfolio, Programs, and Projects.

This is a testament to the importance of your work and how difficult your jobs can be.

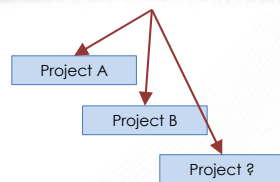
# Project and Project Portfolio Management

The Intelligence behind Successful Software Projects

Directing the individual project correctly will ensure it is done right.

Directing 'all the projects' successfully will ensure we are doing the right projects.

Doing the Right Projects Right!



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Source: MEISTERPLAN

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Project Management and Portfolio Management are not the same, of course.....

If you put project management and portfolio management together that would ultimately mean doing the right projects right!

The PMO is a fixed and permanent entity within the business organization.

The focal points of its work are **resource management** and **cross-level as well as cross-project communication** (source: Strasser).

- Resource Management - Despite the high use of Agile methods that employ stable teams, we at QSM see a keen interest and need for planning and reforecasting resource needs. SLIM makes this possible at the project or release level and aggregated to produce a program and portfolio resource demand plan.
- Communication – Providing stakeholders across the Enterprise with the information they need and fostering conversations about that, and with SLIM having access to more data that provides insight to guide decisions regarding project estimate assumptions and tradeoffs and a project's likelihood to be successful, ensures projects and portfolios meet the Business' strategic objectives.

The Intelligence behind Successful Software Projects

## IT PMO Challenges

- **Implementing New Processes**
  - Clearly define Expectations & Scope
  - Keep up with Changes in the Business
- **Resource Management**
  - Skills change as Technologies change
  - Resource Shortages cause project Goals to Change
- **Prioritization**
  - Project Timeline supports Business Strategy
  - Have to say “No” when Budgets Shrink
- **Improving Tools**
  - Spreadsheets still Most Used!
  - Traditional PPM Tools
  - Visibility → Trust
- **Governance**
  - Framework for Defined process and Activities

Estimate assumptions, esp. size, transparent & validated; process workflow

Skills Allocation to projects, Resource Demand Plan; What-if to explore changes

Data on Capacity, Value & Strategy; Timeline changes

Custom filtered Project List; KPIs, Portfolio Dashboards

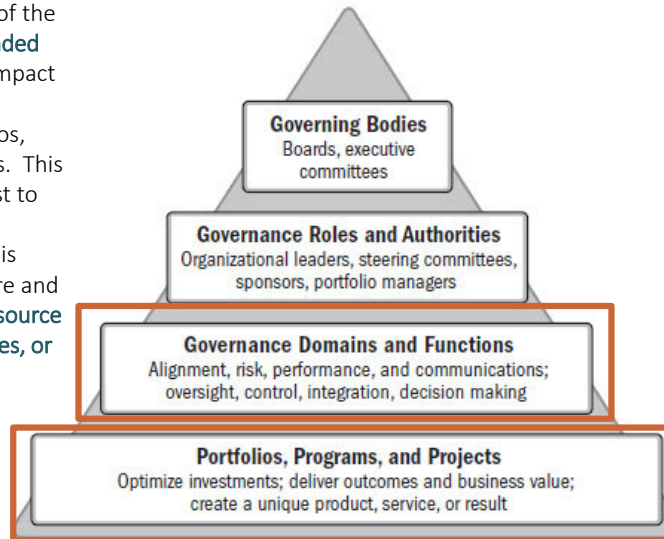
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I want to highlight some major IT PMO Challenges and then Keith will show you how SLIM helps overcome these challenges:

- Processes are put in place to achieve specific outcomes, especially clearly defined expectations & scope. Those processes have to keep up with business changes. During estimation it is particularly important to understand project goals and the assumptions about scope and capacity used to calculate estimates. SLIM-Collaborate provides workflow elements to help define and automate processes.
- The need for Resource Management is constant (sub bullets). SLIM’s top down estimation methodology tells you how many resources of each skill type you need based on the size of your projects. You get a resource demand plan of people, effort, and cost at the project and portfolio level. The powerful ability to perform What-if analysis helps you explore the impact and risk of changing resource needs due to technology and the economy.
- Doing the right projects has a lot to do with timing and exposing unrealistic project expectations. SLIM’s data on capacity and value tradeoffs help you make data-driven decisions to ensure the business strategy is being met and to educate and inform the business on how that strategy can be adjusted to reduce risk and increase success.
- Good processes are supported by good tools. I was a bit shocked to find out that the most used tool is still spreadsheets! I have seen some very creative and complicated ones, and it is hard to see the big picture. PPM tools are great, in fact SLIM integrates with them, but they don’t focus on scope and capacity and quality, which are so important. Custom project lists and four different types of dashboards in SLIM promotes visibility into the work being done at every level and that promotes trust in the PMO.
- Lastly – Governance is a key function of the PMO. Accountability helps maintain focus on Doing The Right Projects Right.

“People at every level of the organization and **extended stakeholders** have an impact on the governance framework for portfolios, programs, and projects. This topic is of great interest to organizations, because **ineffective governance** is often noted in literature and research findings as a **source of project delays, failures, or other negative consequences.**”



## Quote

SLIM-Collaborate supports the foundation of the governance pyramid.

The top-down scope-based approach and development project model is specifically designed to identify and quantify risk, provide standard cross-project data on performance and capacity, provides ample project metrics to promote alignment, oversight and collaborative decision-making.

I will now turn the presentation over to Keith to show you how it works.

Questions?

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