

Eugene PMI – Project Management Round Table

Visibility of Projects to Senior Executives:

Use of PMOs, Balanced Scorecards, and Dashboards

November 14, 2012

Putting the Fun back in Dysfunctional

Bring in the Noise bring in the Funk

(We were certainly having fun with a good discussion!)

The attendees were invited to discuss project management issues of their choosing. The topic chosen was Visibility of Projects to Senior Executives: Use of Scorecards and Dashboards (and PMOs).

Notes from the discussion are below.

Table of Contents

Definitions / Assumptions.....	2
Goals of a PMO and Project / Product Visibility Tools are:.....	2
Senior Executives are:	2
Other Definitions:	2
Tools.....	2
Implementation	2
Success Stories	2
Support / Buy-In.....	3
Identify Who Can Help	3
Communicate	3
Collaborate.....	3
Potential Resistance Areas.....	3

Definitions / Assumptions

Goals of a PMO and Project / Product Visibility Tools are:

- **Report on project statuses** (consistently)
- Bring more projects to **successful completion**
- Increase **project management skill** across the company
- Increase **visibility** across the company especially in relation to project/department interdependencies
- Help better match **resource allocation** – Incorporating resource allocation / use / need into balanced scorecards and dashboards can help with capacity planning for project pipeline.
- Helps with the switch from the project stage to ongoing **operational support**.

Senior Executives are:

- CEO / President / VPs
- Part of the executive group in the organization
- Folks who control the purse strings and priorities

Other Definitions:

- Dashboards and scorecards are different tools for use with either projects or products.

Tools

- **Balanced Scorecard** – Need to define the Key Performance Indicators (KPIs)
- **Dashboard** – Can use this to measure the product performance, not necessarily the project that implements the project.
- **Project Request Form** – Use this to rank projects on executive support, cost, etc. PMO receives and processes.
- **Escalation Process** – Only if there are issues, escalate to the Executive Team.
- Use a **spreadsheet** instead of a big, new technologically cumbersome system
- Use a **short executive report** – On-time, on-budget, major issues
- **Road Map** of project (or sprint, in an Agile environment) dependencies

Implementation

- For-profit – Implementing may require adding more resources
- Nonprofit – Implementing may not add more resources, or extend the timeline, because there's no money in the budget, etc.

Success Stories

- White Paper from PMI on 2012 pulse of the PM industry that discusses PMOs, support, and success.
- Umatilla Success story in PM Magazine for PMOs.

Support / Buy-In

How to instill values / build trust when implementing / adopting a PMO, balanced scorecards, or dashboards across an organization

Identify Who Can Help

- Informal buy-in by most is okay, **if the President / or someone very high up is “sold”**
- **Balance of power** – The people with the power and the purse strings, who promote high visibility of the projects, if they buy in, will help others fall in line.
- An Executive or project sponsor role / responsibility is needed.

Communicate

- **Transparency**
- **Own your “stuff”** (e.g. “We didn’t meet our deadline.”) Don’t dodge ownership.
- **Understanding of project management** is needed by the managers and staff in order to gain momentum and counteract the perception of “more forms” and “more bureaucracy.”
- Use words and **language** that others can understand and get behind.
- Vary the **reporting** using different methods
- **External Facilitator** – Having someone come from the outside is often more successful than someone (or ones) on the inside because they don’t have to be afraid of stepping on others’ toes.

Collaborate

- Use a framework and build on it with lots of other people to have a **highly collaborative buy-in** of many, not just a few.
- **Steering Committees**
 - Invite the executives, on a quarterly or ad-hoc basis, to meetings to increase the visibility of the project.
 - Have functional managers in steering committees.
 - Having only the attendees have a vote may help keep attendance up.
 - There is strength in numbers using a Steering Committee to help get support.
- Define **Boundaries** Well between a PMO / Project Management and Operational staff / work / projects – Roles / Responsibilities
- Executives are sometimes not interested in the projects, per se, but the **bottom line** impact to the organization.

Potential Resistance Areas

- **Governing Bodies** – Sometimes, other governing bodies can come in and change direction or quash the PMO or Project Management initiative.
- **Department Heads** – When moving to a PMO, with the change in power structure and more power with the PMs, resistance from the Department Heads is possible.
- **Others’ Sacred Cows** – Use or hire an external facilitator to help a group identify these important projects.
- **Politics** – Need we say more?