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# A Day in the Life: PMO

Your Guides:  
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# Agenda

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- Defining our North Star
- “Day In The Life”
  - Managing the Pipeline
  - Resource Utilization & Workload Management
  - Measuring Progress & Performance
  - Stakeholder Engagement
- Common Challenges
- Conclusion & Recommendations

# Framing the Problem

What no one told you Project Management was like...



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vs. What we wish it was like...



# Our North Star Statement

The ideal “Day in the Life” for a PMO Leader involves efficient and effective leveraging of:

- People
- Process
- Technology

to look holistically across the PPM landscape for areas that require influence, intervention, or insights, so that business outcomes are achieved, people are empowered and supported, and the PMO is recognized as a strategic partner in the delivery of value.

# Our North Start Statement

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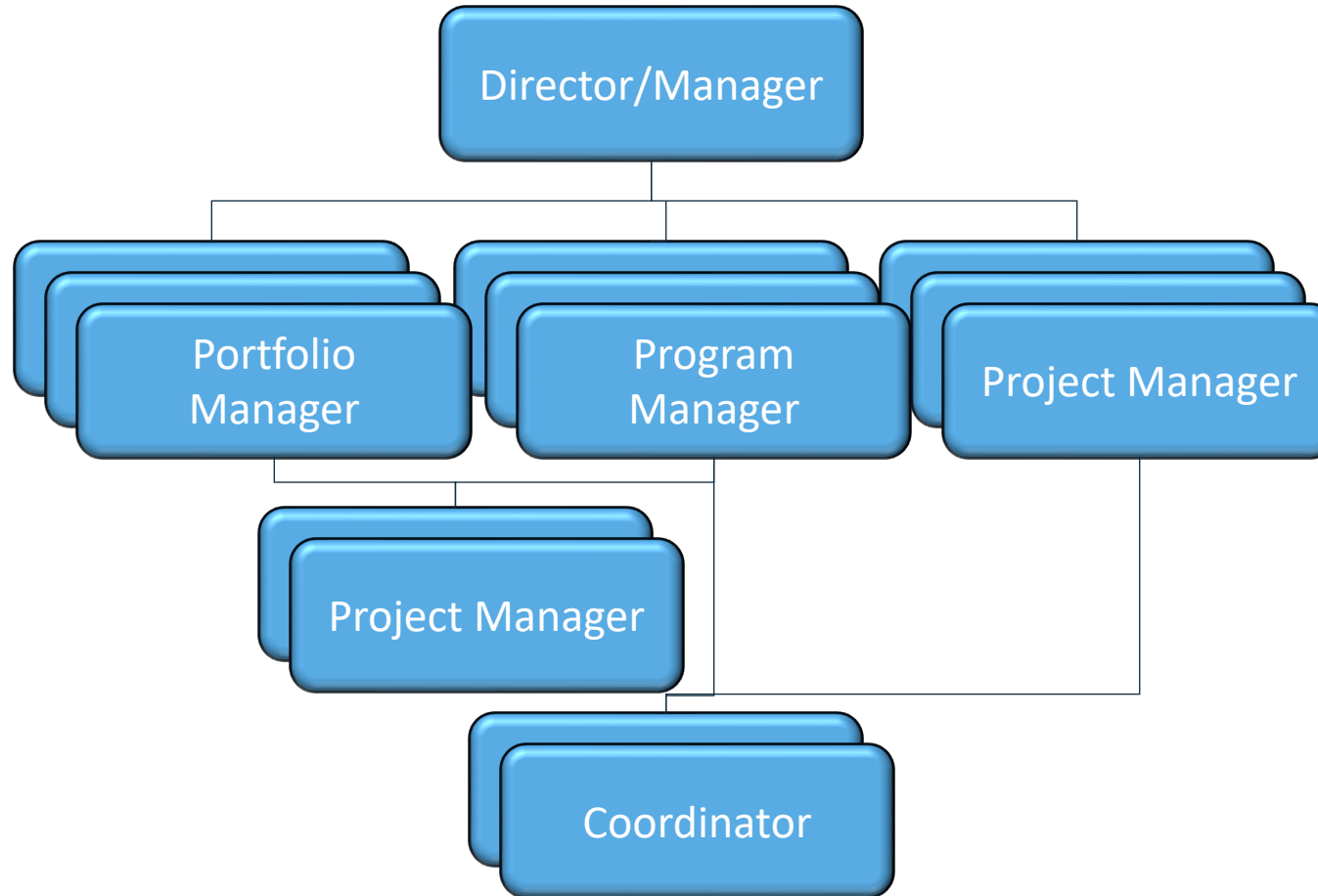
to look holistically across the PPM landscape for areas that require **influence, intervention, or insights**, so that **business outcomes** are achieved, **people** are empowered and supported, and the PMO is **recognized** as a strategic partner in the delivery of value.

# PMO Evolution

| Traditional PMO                                                    | Next Generation PMO                                                      |
|--------------------------------------------------------------------|--------------------------------------------------------------------------|
| Focus mostly on <b>tactical</b> issues                             | Focus on <b>strategic</b> and <b>cultural</b> issues                     |
| <b>Science</b> of project management                               | <b>Art and craft</b> of project management                               |
| Views organization as a “complex <b>machine</b> ”                  | Views organization as a “complex <b>ecology</b> ”                        |
| Emphasis on <b>monitoring</b> and <b>control</b>                   | Emphasis on <b>collaboration</b>                                         |
| Provides tools similar to a precise “ <b>map</b> ” to follow       | Provides tools similar to a “ <b>compass</b> ” that show the direction   |
| <b>Internal process</b> focused                                    | Focus on <b>end products, customers, and outcomes</b>                    |
| <b>Process</b> driven                                              | <b>Business</b> driven                                                   |
| <b>Standard (heavy)</b> methods and practices                      | <b>Adaptable and flexible (agile)</b> methods and practices              |
| Based on <b>rules; follow rules</b>                                | Based on <b>guiding principles; follow rules and improvise if needed</b> |
| <b>Defined, repeatable, managed</b> and <b>optimized</b> practices | <b>Adaptive and innovative</b> practices                                 |
| Focus on <b>efficiency</b>                                         | Focus on <b>effectiveness</b> and <b>innovation</b>                      |
| <b>Process</b> leadership                                          | <b>Thought</b> leadership                                                |
| <b>Heavy</b> management and governance                             | <b>Balanced</b> management, governance, and <b>leadership</b>            |

# PMO Structure

- Build for future growth and continuous improvement



Intake Process  
Owner

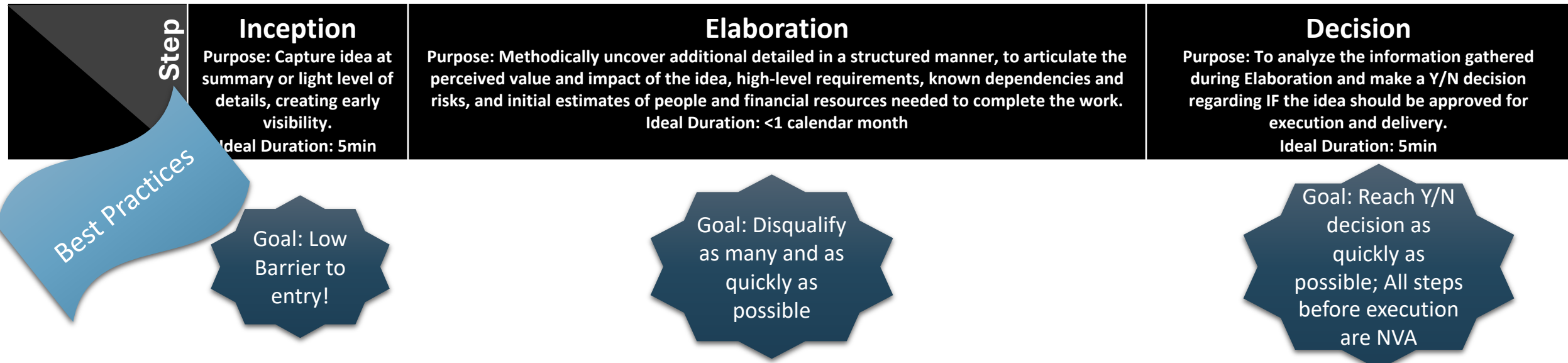
PLC Process  
Owner

Resource  
Management  
Practices Owner

# Day in the Life

# Managing The Pipeline - Process

- Effective Intake/Demand Management requires consistent, simple, and commonly accepted process discipline
- The PMO Leader is often responsible for overseeing process adherence and data governance



# Managing The Pipeline: People

- PMO Analyst / Coordinator
  - Process & Data Governance
  - End User assistance
  - Free up the PMO leader's time
- Portfolio Managers
  - Data input, estimations
- Your Senior Leaders
  - Manage upward; Champion process adherence, remove barriers

## OPEN MIC:

As a PMO Leader, what are the biggest challenges you struggle with managing the intake pipeline?

# Managing the Pipeline: Technology

- Use Templates, Blueprints, Business Rules; maintain the “MVP” while allowing flexibility
- Saved Views create instant visibility and transparency

The image displays two overlapping screenshots of the Rego platform interface, illustrating the 'Managing the Pipeline: Technology' theme.

**Left Screenshot: Idea Blueprint - Workflow**

This view shows the 'Idea Blueprint - Workflow' under the 'Administration' > 'Blueprint' menu. It includes a 'Select a Template' dropdown, a 'Group By' filter, and a 'Subject' filter. The main content area displays a list of ideas grouped by priority (None, High, Low, Medium) and starred status. The 'Medium' priority group is selected, showing 3 ideas.

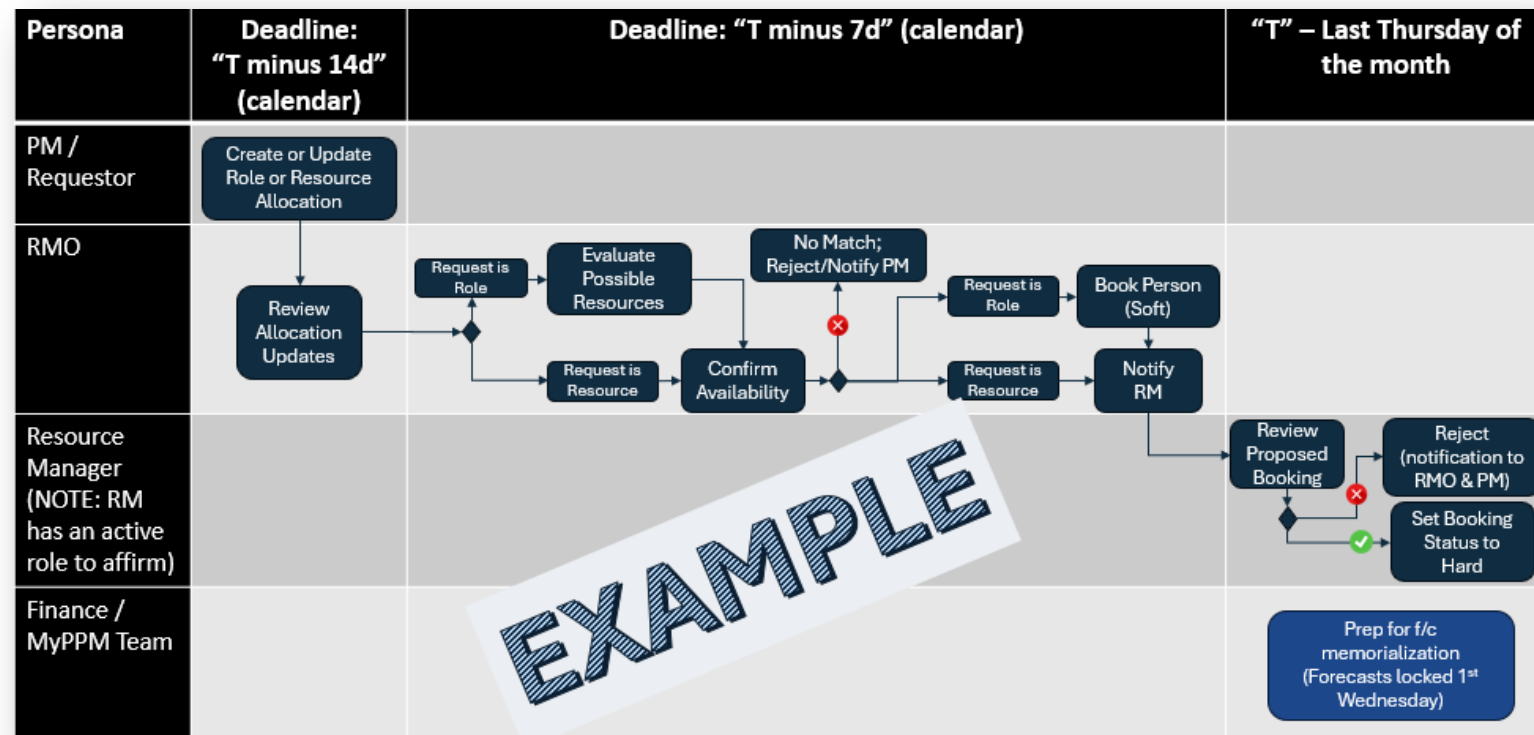
**Right Screenshot: Ideas**

This view shows the 'Ideas' management interface. It includes a 'New from Template' button, a search bar, and a 'View Intake Board' dropdown. The main content area displays a list of ideas with columns for 'Planned Cost by Type', 'High Priority', and 'Approved Ideas'. The 'Approved Ideas' column shows a count of 3. Below the list, there are tabs for 'Review for Fit', 'Estimating', 'Review for Approval', and 'Approved'. The 'Review for Approval' tab is active, showing details for three ideas: 'Security Enhancements', 'New Online Application', and 'AP Architecture Consolidation'. Each idea card displays start and finish dates, manager, status, planned cost, planned capital %, and planned ROI.

# Resource Utilization: Process

- Best Practice is a simple, well-defined process with a reasonable & consistent cadence
- Operational Definitions are VITAL for understanding key terms
- Consider planning horizons

Resource conflicts are often the most common cause of Project schedule delays and cost overruns!!

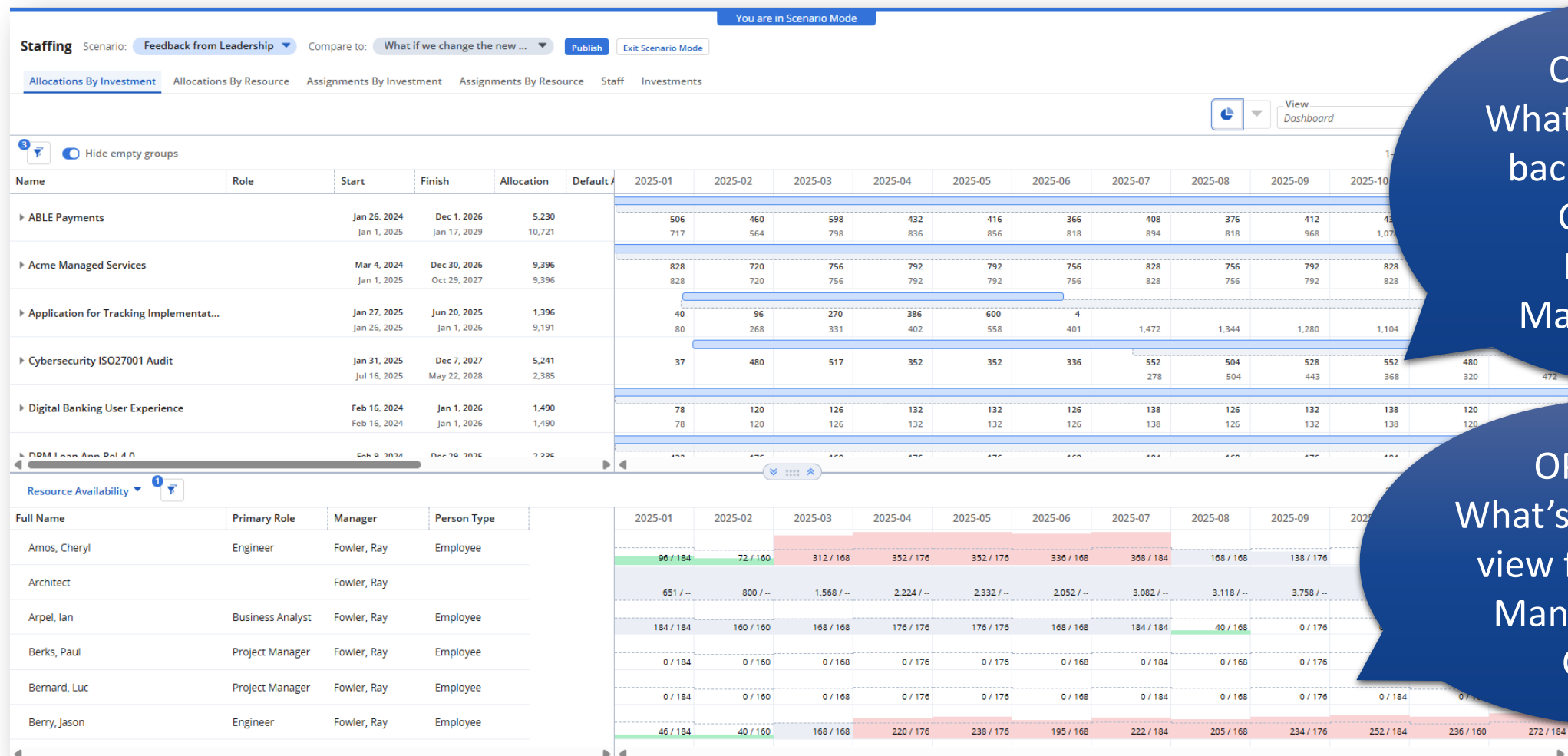


# Resource Utilization: People

- Resource Managers must maintain engagement and process adherence; There is no “Set it and forget it” here
- The PMO Leader is often responsible for overseeing RM processes AND acting as a Resource Manager for the PMs
- Project Managers are responsible for regularly monitoring and updating their own allocations as well as their Project Team estimates
- Individual contributors need to monitor their workload and escalate any imminent or potential conflicts

# Resource Utilization: Technology

- Clarity's (many) Staffing modules have immense power and flexibility



OPEN MIC:  
What has held you  
back from using  
Clarity for  
Resource  
Management?

OPEN MIC:  
What's your "Go-To"  
view for Resource  
Management in  
Clarity?

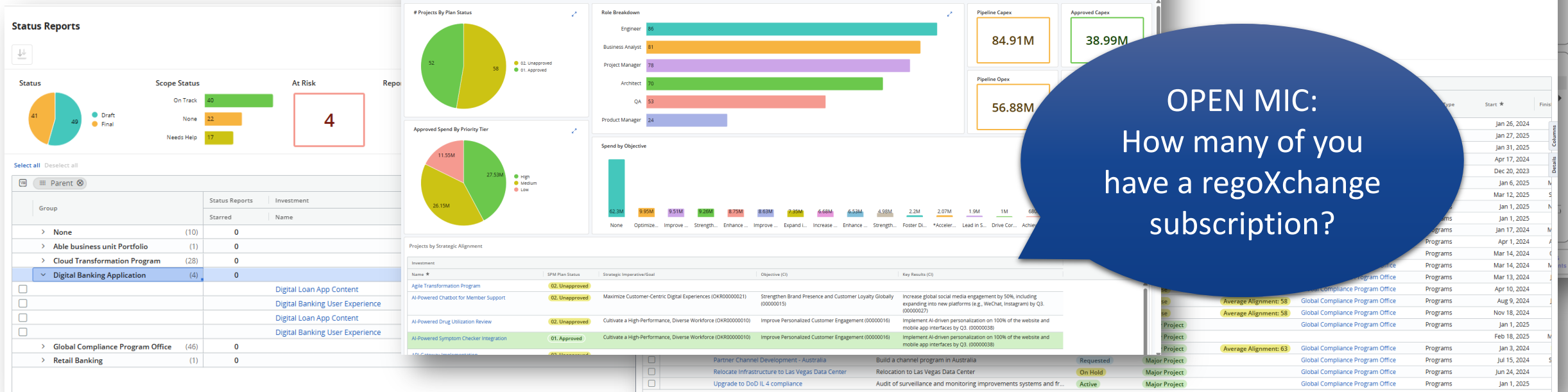
# Measuring Progress & Performance: Process

- The Challenge: “More” is not always more!
- Leaders have more options than ever for visualizing data
- Multiple sources of truth and data definitions hinder trust
- KPIs, Strategic Alignment (OKRs), and Benefits Realization are different domains which often get comingled



# Measuring Progress & Performance: Technology

- Carefully plan and deploy persona-based visualization options
- Manage by Exception
- Watch for “feel good green”
- [regoXchange!](#)



# Stakeholder Engagement: Process & Tech

Start by understanding the personas and what they need to see. Provide a personalized engagement model and supporting toolset.

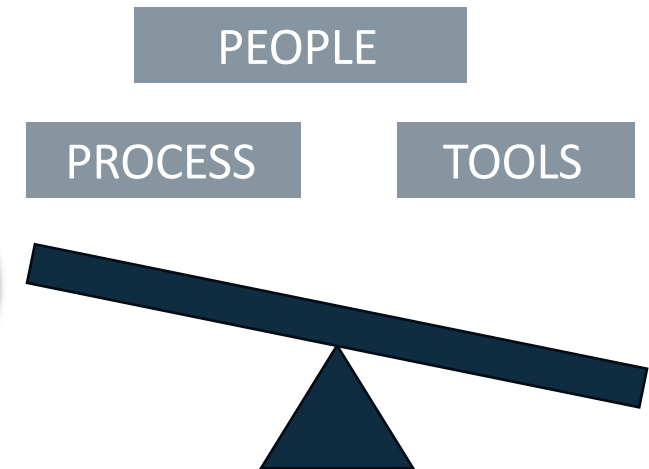


# Stakeholder Engagement: People



- Soft skills and leadership are too often minimized.
- Active listening, conflict resolution, motivation, and team morale.
- Real-life PMs spend much of their day navigating interpersonal dynamics. PMOs are challenged to do this across levels of management and functions

OPEN MIC:  
What are some  
people leadership  
experiences that  
have impacted you?



# Common Challenges & Recommendations



# Project Prioritization and Intake Control

Uncontrolled Intake without a Prioritization Framework is an ongoing struggle for many PMOs.

## FIRST CHALLENGE

2

3

4

5

### What can we influence?

- 1 Facilitated Intake
- 2 Insist all Intake should be in Clarity “No Clarity, No Money”
- 3 Publish Project and Programs Pipeline
- 4 Group Project by Priority, Tiers
- 5 Share Visuals and Value of Clarity Data

# Capacity Planning and Resource Management

Mostly people are over allocated due to too many projects in flight, but it is equally challenging to ensure some resource have enough work.

1

SECOND CHALLENGE

3

4

5

## What can we do

1

Dedicate  
someone to  
lead RM

2

Create RM  
Policies

3

Start to Measure and  
Monitor Dedication  
Metrics

# Poor Communication

Gaps in information sharing between team members, stakeholders, or departments.

1

2

## THIRD CHALLENGE

4

5

Missed deadlines, duplicated work, or conflict.

1

Use a centralized communication tool

2

Create a communication plan

3

Encourage two-way communication

4

Be consistent and proactive

# Resource Constraints

Limited access to skilled personnel, time, or budget.

1

2

3

## FOURTH CHALLENGE

5

Inability to meet project deliverables efficiently.

1

Prioritize investments w/clear documented criteria

2

Utilize staff module with resources, roles, and allocations to capture demand

3

Implement resource management practices

4

Utilize Clarity's Staffing module – Allocations by Investment and Allocations by Resource

# Managing Stakeholder Expectations

Balancing differing or conflicting interests among stakeholders.

1

2

3

4

## FIFTH CHALLENGE

# 5

Dissatisfaction or resistance during delivery or change implementation

1

Set clear expectations early

2

Maintain transparent and regular communication

3

Manage changes through a structured process

# Open Discussion

- What other day-to-day challenges do you face as a PMO leader?
- What have been some victories you've experienced in shifting your PMO responsibilities from chaos to harmony?



# Summary and Final Thoughts

- Build Supporting Structure in your PMO
- Map Personas of your Stakeholders
- Assign ownership to all processes and practices focused on continuous improvement
- Organize your Clarity views to take you directly data that needs your attention!
- Bonus Item: Consider measuring RM health with some new metrics:
  - ✓ **Average Allocation** by department/team
  - ✓ **# of Projects Assigned** to each person
- PMO Powered by AI (Broadcom)

# Questions?





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and Technical Proficiency

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# Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



## Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



## Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

# Surveys

Please take a few moments to fill out the class survey.  
Your feedback is extremely important for future events.



# Thank You for Attending Rego University

## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **Rego University**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!  
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# Continue to Get Resources and Stay Connected

- 1 Use [RegoXchange.com](https://RegoXchange.com) for instructions and how-tos.
- 2 Talk with your account managers and your Rego consultants.
- 3 Connect with each other and Clarity experts at [RegoGroups.com](https://RegoGroups.com).
- 4 Sign up for webinars and join in-person Rego groups near you through at [RegoConsulting.com](https://RegoConsulting.com).
- 5 Join us for the next [Rego University](#)!

