



The PMO Playbook: A Modern Day in the Life

Your Guides:
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Agenda

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

Framing the Problem

3

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



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vs. What we wish it was like...



The PMO

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

- People
- Process
- Technology

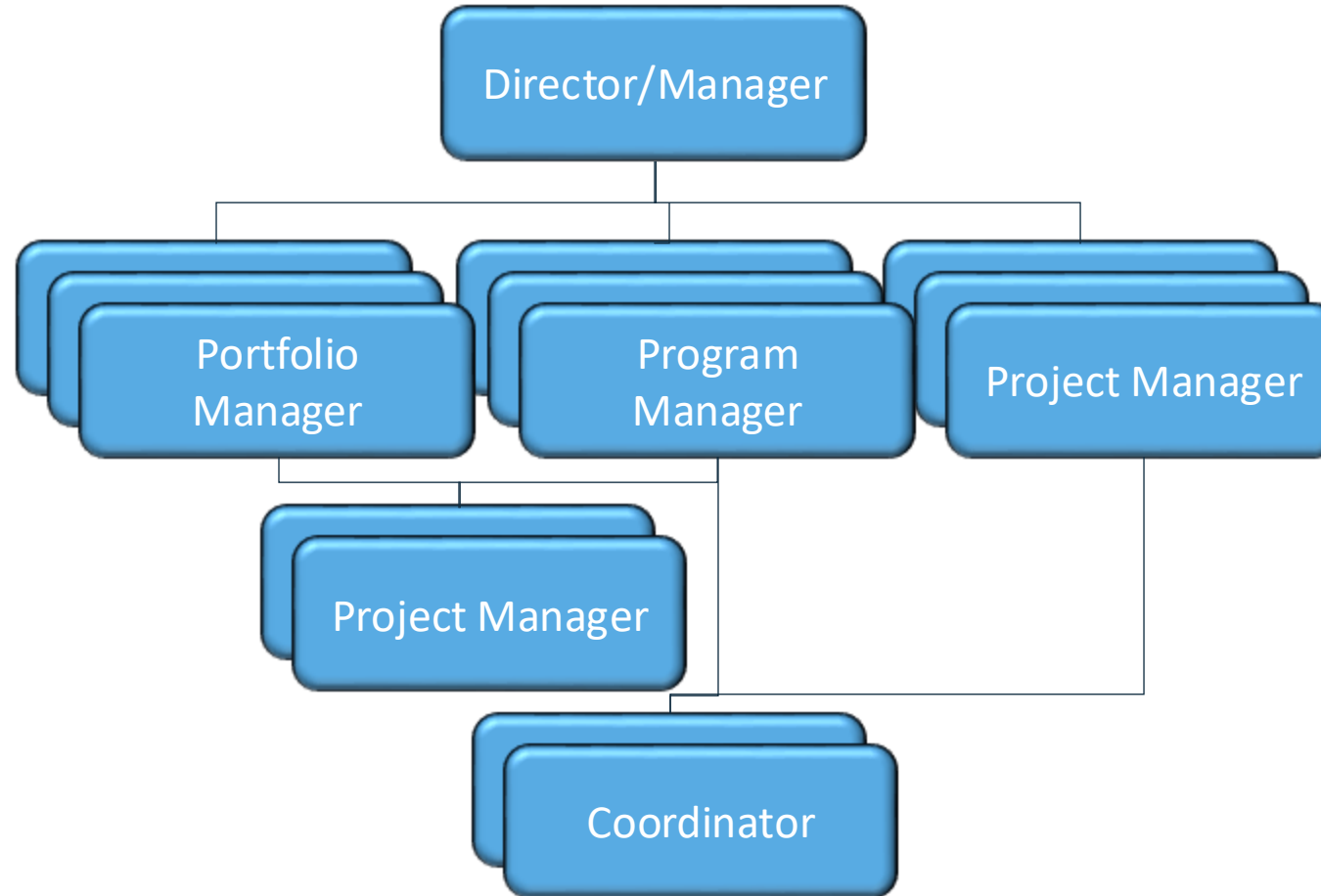
to look holistically across the PPM landscape for areas that require influence, intervention, or insights, so that business outcomes are achieved, people are empowered and supported, and the PMO is recognized as a strategic partner in the delivery of value.

PMO Evolution

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

PMO Structure

- Build for future growth and continuous improvement



Intake Process
Owner

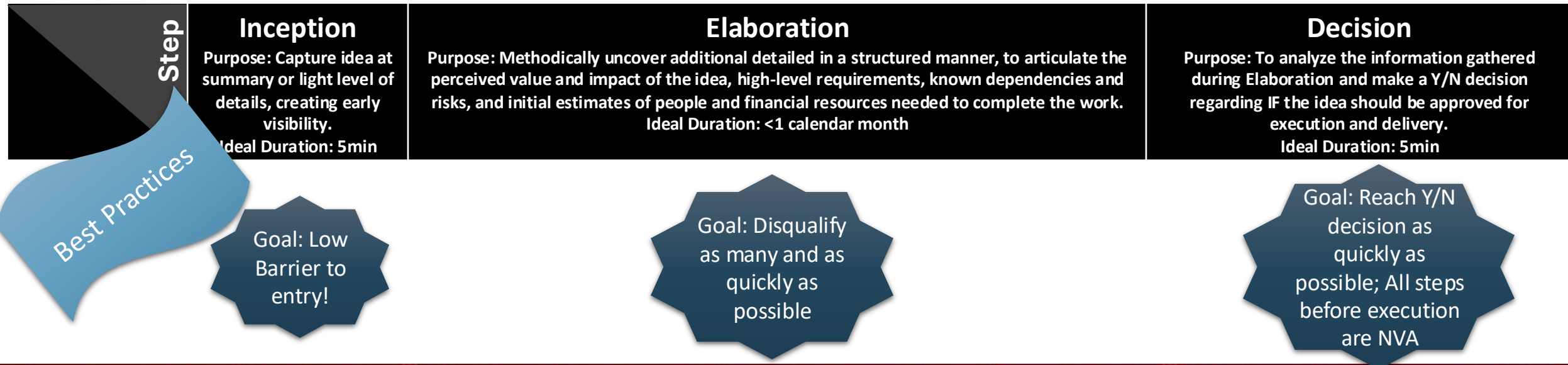
PLC Process
Owner

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 'Idea Blueprint - Workflow' and 'Ideas' management capabilities.

Idea Blueprint - Workflow (Left Screenshot):

- Navigation:** Administration > Blueprint > Idea Blueprint - Workflow
- Actions:** New from Template
- Filters:** Strategy, Idea Priority
- Table:**

Group	Starred	Subject *
> None (10)		
> Delight Customers to Drive Revenue (4)		
> Exploit AI & Analytics (2)		
> Optimize Back Office Operations (7)		
> High (2)		
> Low (2)		
> Medium (3)		
> Secure the Enterprise (3)		

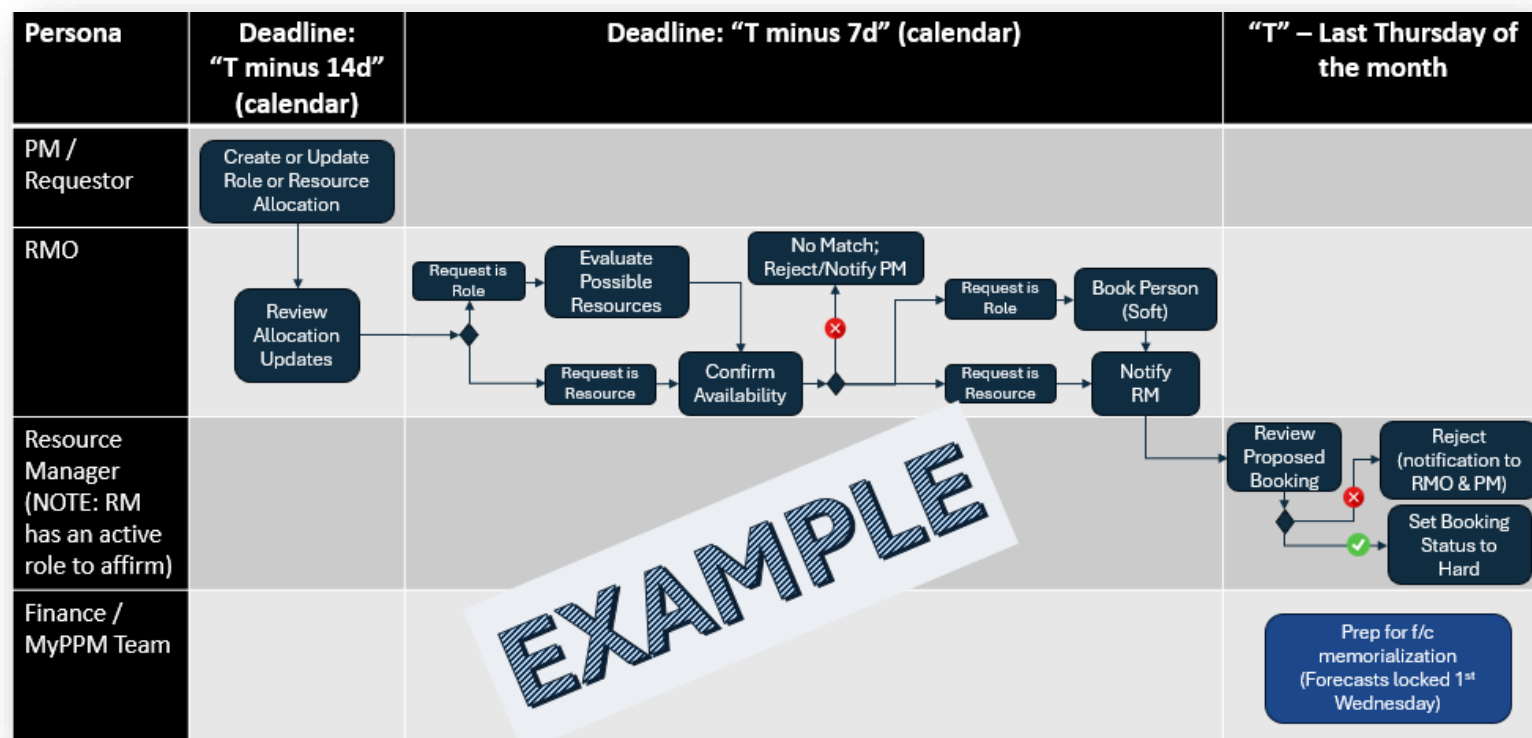
Ideas (Right Screenshot):

- Navigation:** New from Template
- Search:** Search...
- Views:** View Intake Board
- Charts:**
 - Fund Distribution by Pr...:** Pie chart showing 32% Medium, 62% High, 6% Low.
 - Planned Cost by Type:** Horizontal bar chart showing Major Project (\$95M), Release (\$35M), Small Project (\$18M).
 - High Prior...:** Donut chart showing 29%.
 - Approved Ideas:** Box showing 3.
- Workflow Stages:** Review for Fit, Estimating, Review for Approval, Approved.
- Project Details:**
 - Major Project:** Security Enhancements (Start Date: Jun 10, 2024; Finish Date: Mar 29, 2025; Status: Submitted for Approval; Planned Cost: \$0; Planned Capital %: 0%; Planned ROI: 40%).
 - Small Project:** New Online Application (Start Date: Jun 10, 2024; Finish Date: Mar 2, 2025; Status: Submitted for Approval; Planned Cost: \$0; Planned Capital %: 5.405%; Planned ROI: 89.189%).
 - Release:** AP Architecture Consolidation (Start Date: Jun 3, 2025; Finish Date: Mar 2, 2026; Status: Submitted for Approval; Planned Cost: \$0; Planned Capital %: 20%; Planned ROI: 260%).
 - Product Development:**

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!!

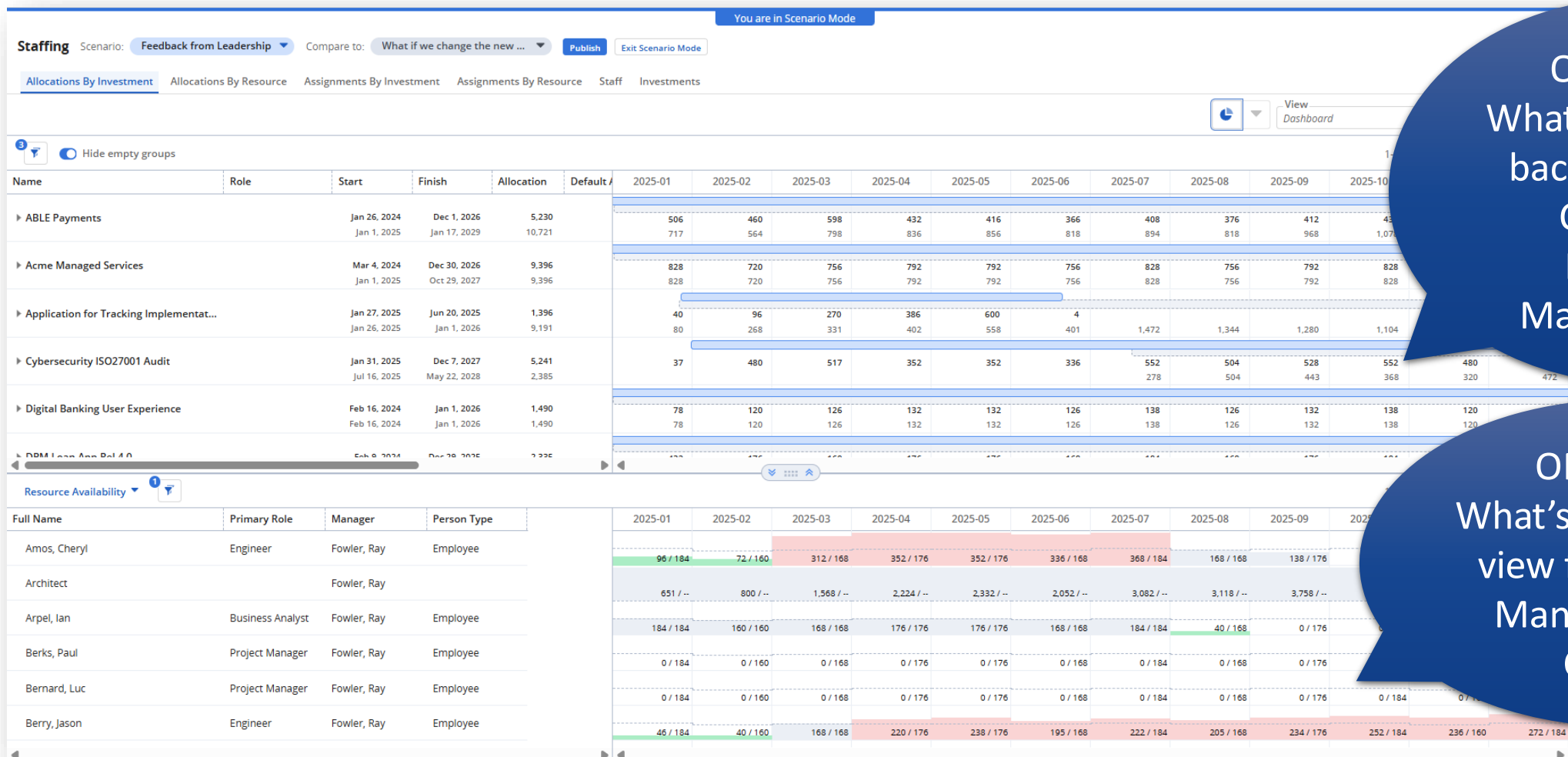


Resource Utilization: People

- 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?

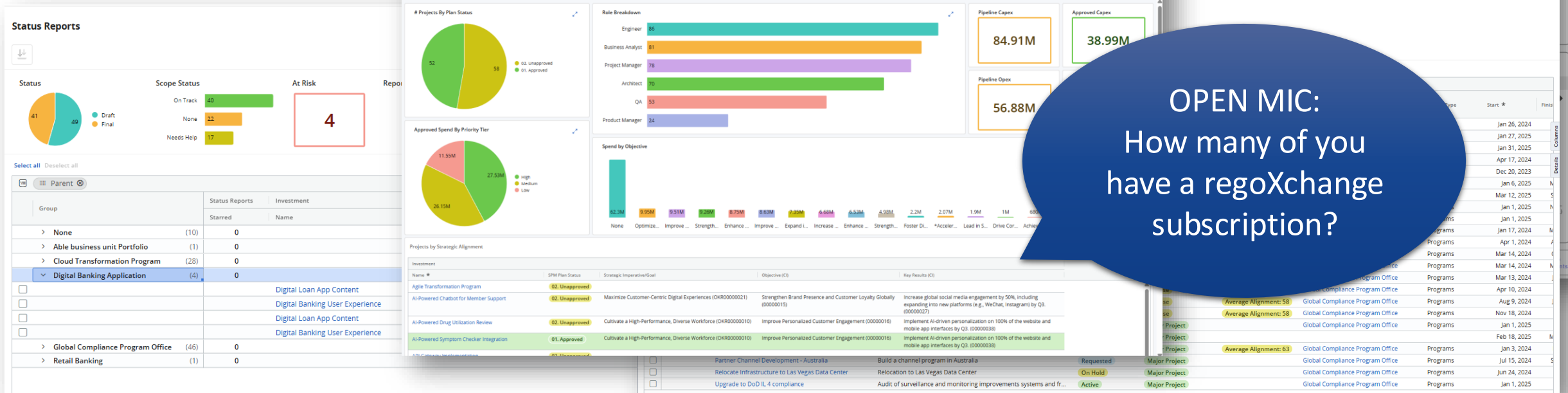
Measuring Progress & Performance: Process

- 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.

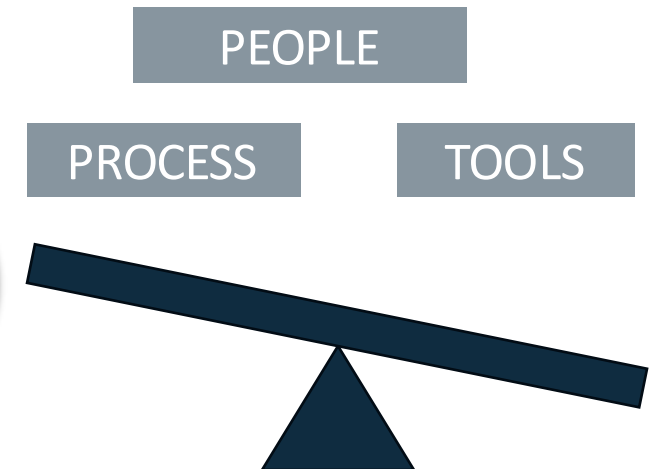


Stakeholder Engagement: People



- 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

3

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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