



PMO Status Update & Mini Workshop with IT Project Managers

PMO Team

January 2023

Overview

Total: 2h

- **PMO Update: 30min**
- **Q&A: 30min**
- **Project Templates: 20min**
- **Interactive workshop: 30min**
- **Wrap-up and next steps: 5min**

PMO Update

Overview

- **PMO Role**
- **PMO in 2022**
- **Project Lifecycle**
 - Process
 - Roles and Responsibilities
 - What's the value?
- **Project Catalogue**
- **Project Documentation Repository**
- **Next steps**
 - Project Plans
 - PMO Tool
- **Conclusion**

What is the PMO

Project Management

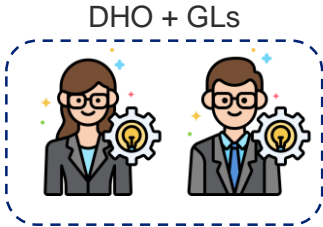
Do projects right



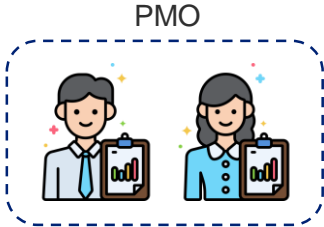
- Project Management
- Best practices
- Standards
- Training
- Community of practice

Portfolio Management

Do the right projects



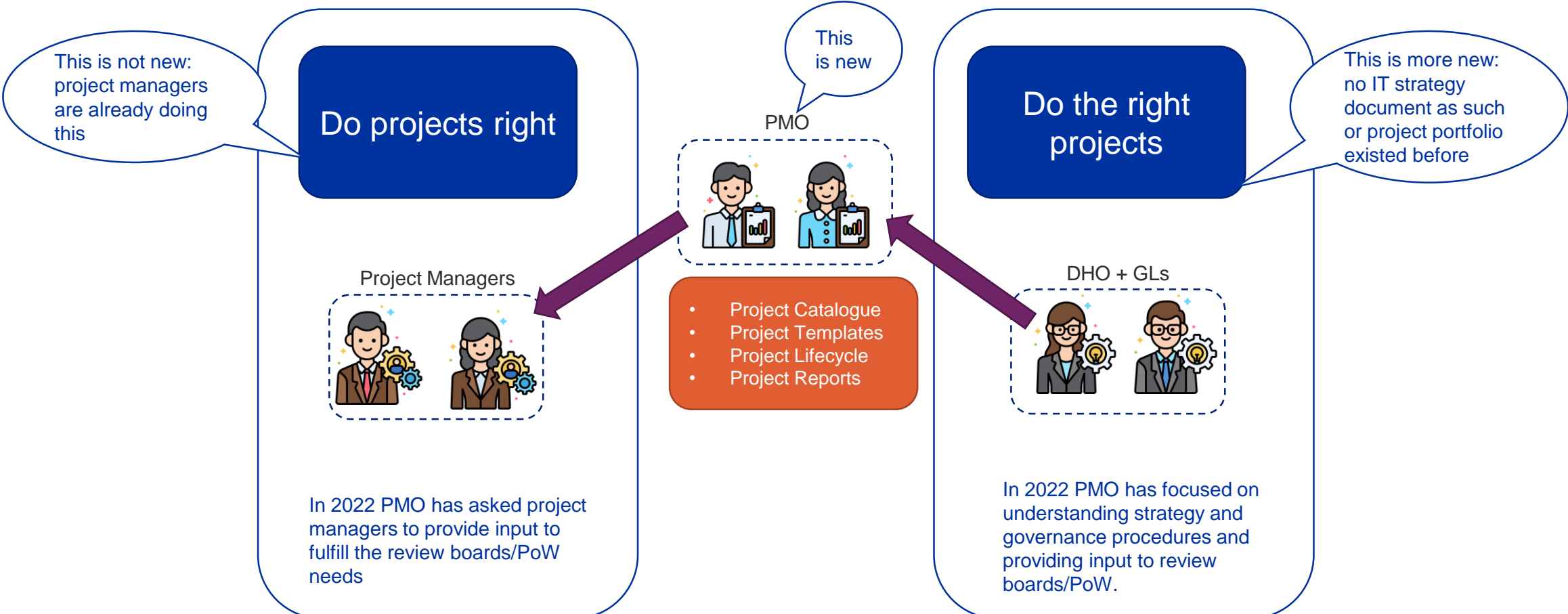
- Strategy
- Resources
- Governance



- Project Catalogue
- Project Templates
- Project Lifecycle
- Project Reports

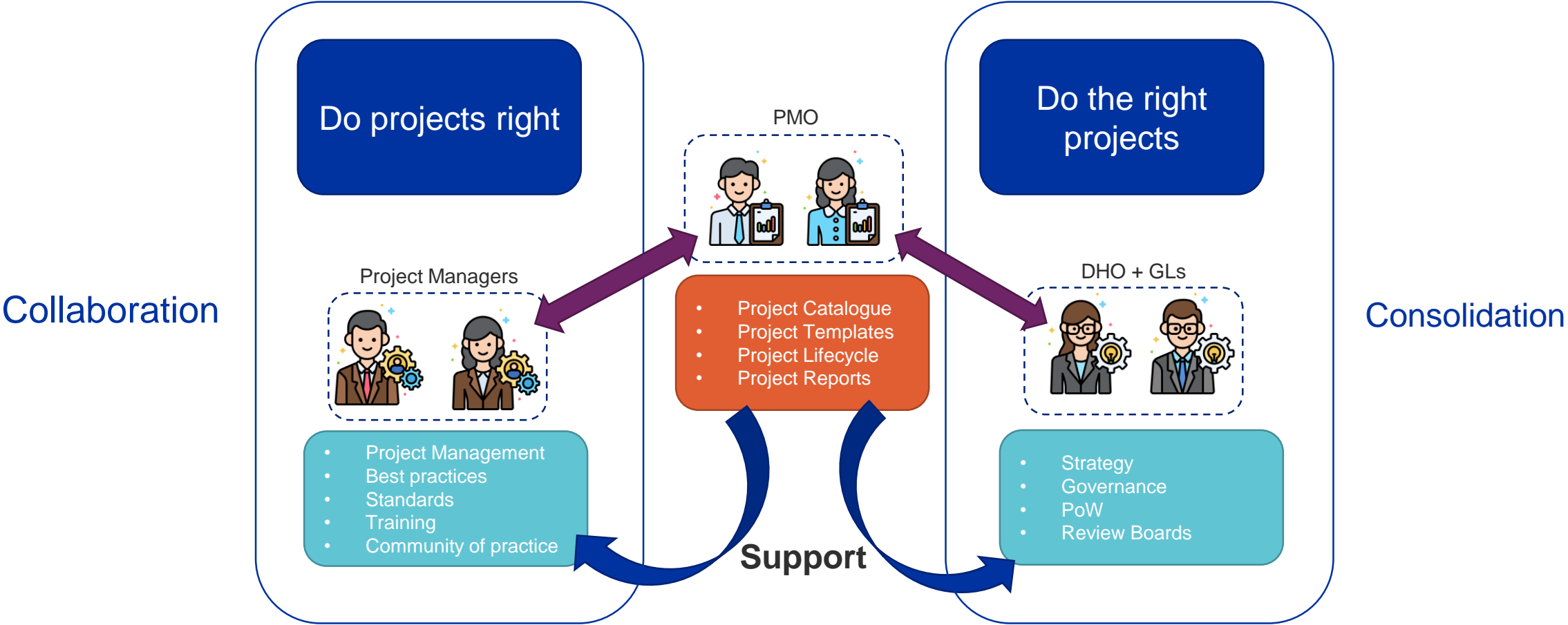
Support
No authority
Focused on Portfolio (high level view)

How have we worked together so far?

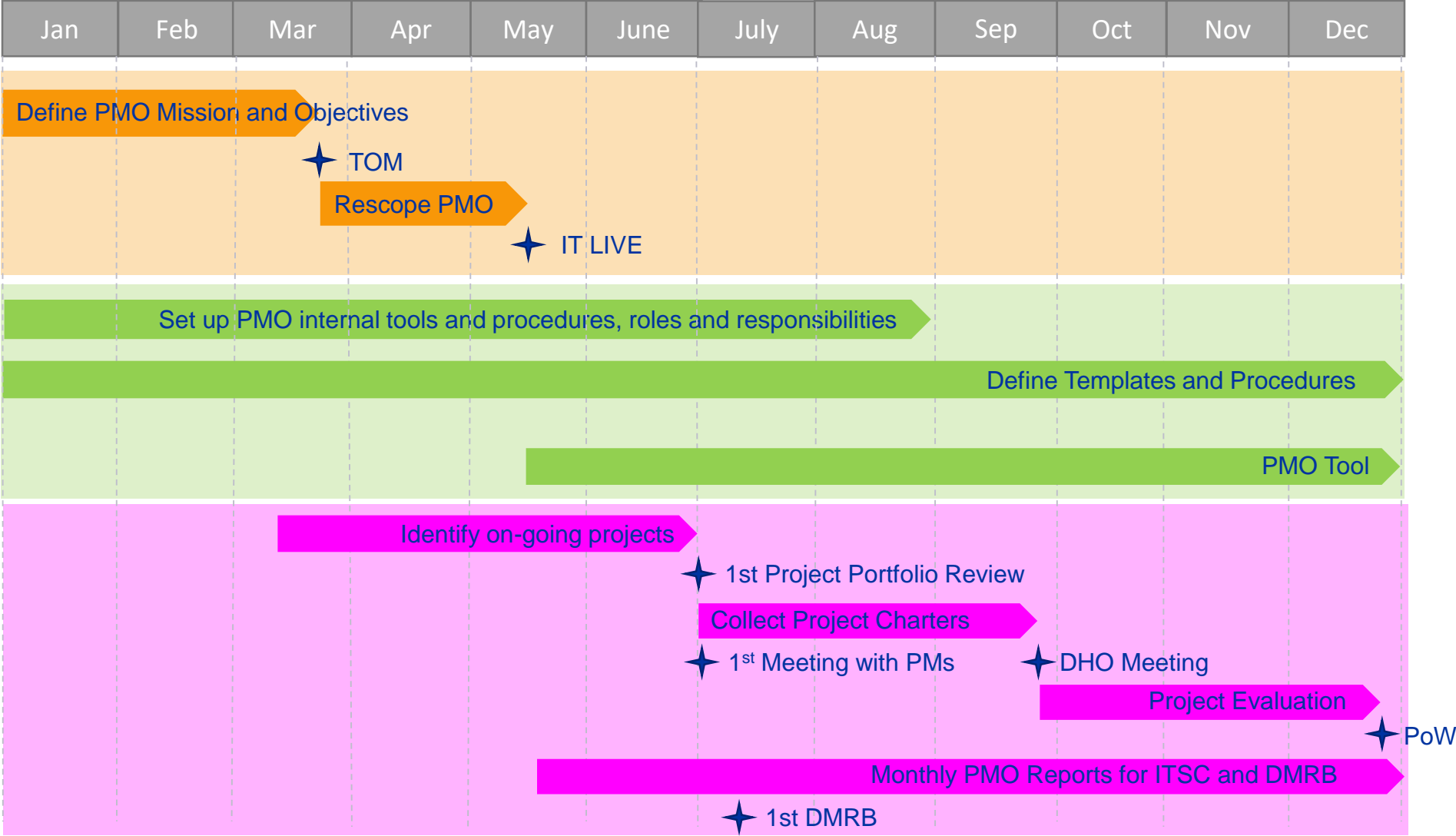


Focus on building PMO
Mostly understanding and supporting governance processes

How PMO would like to work in the future?



PMO in 2022



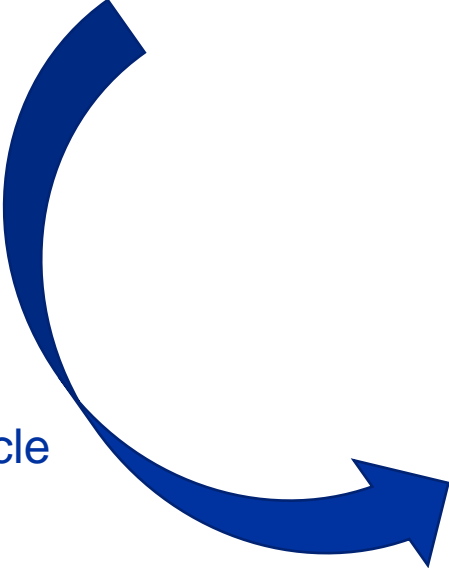
Disclaimer

- **The next slides explain in detail the project lifecycle roles and responsibilities**
 - In some case, like EU projects, the lifecycle is slightly different due to EU deadlines and CERN internal procedures
- **The lifecycle is still evolving as review boards are put in place and it becomes more clear what it is needed for decision making**
 - So expect some more adjustments and changes in 2023

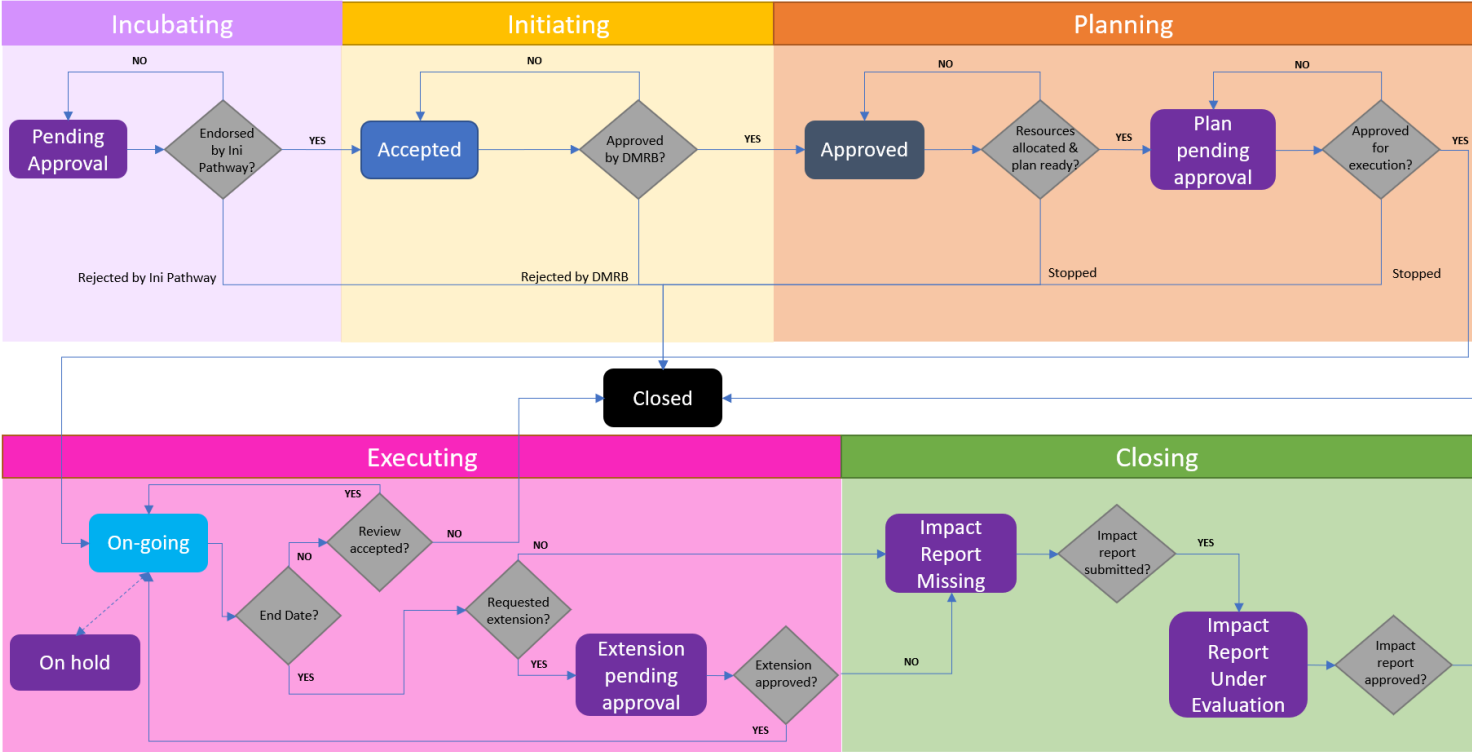
Project Lifecycle 2.0



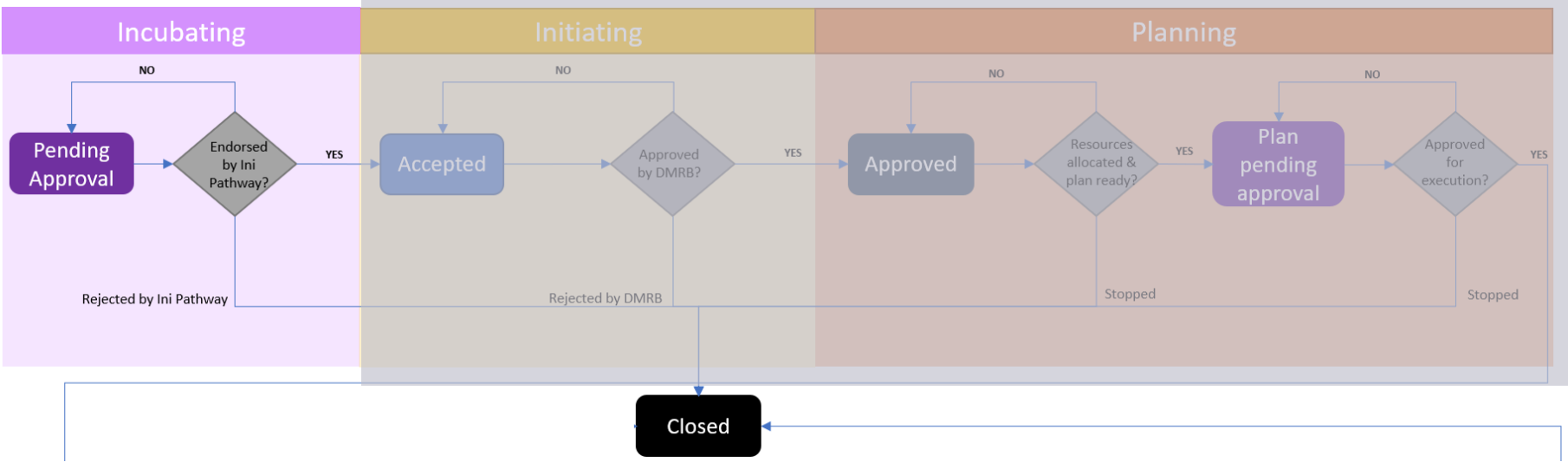
The project lifecycle has evolved



■ Status set by Ini pathways ■ Status set by PPR
■ Status set by DMRB ■ Status set by PMO



Incubating

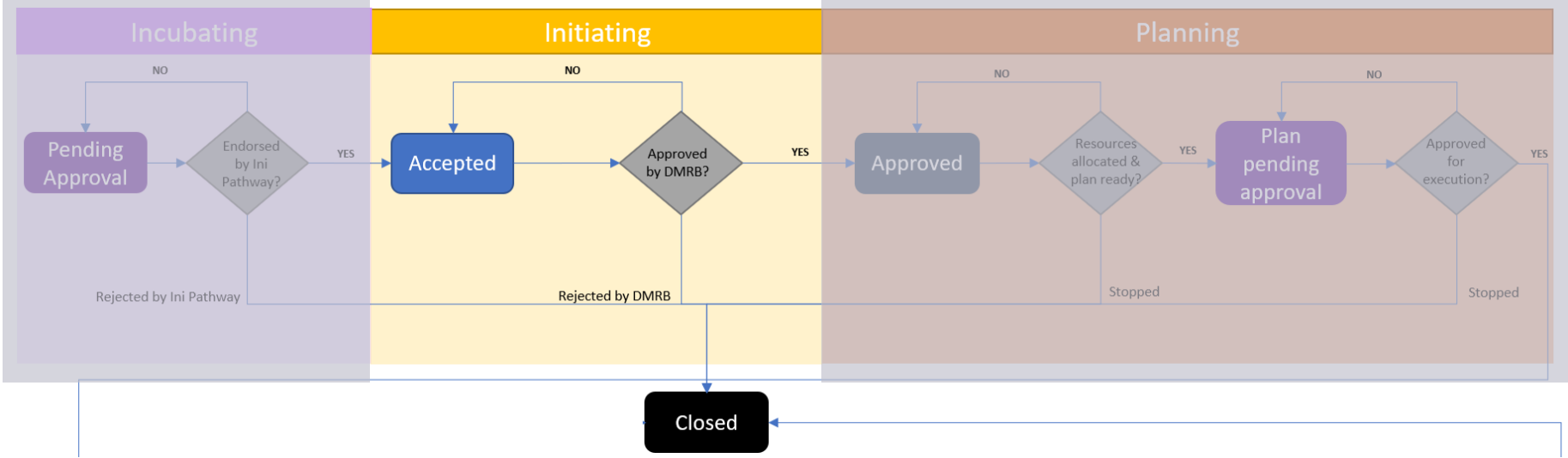


Roles	Responsibilities
IT Personnel	Anybody can start an idea for a project (*) and present it to the relevant Initiation Pathway Leader
Initiation Pathway Leaders	Chair of the relevant review boards to evaluate new project ideas: <ul style="list-style-type: none"> • Innovation Review Board by A. di Meglio • Technical Meetings by D. Duellman • Business Engagement Channels by S. Campana
PMO	<ul style="list-style-type: none"> • Project charter quality check (**) • Admin tasks (update catalogue and document repository) • Confirmation of approved projects from initiation pathway leaders

(*) Project ideas should be discussed first with management

(**) We encourage people to confirm with the initiation pathway leader whether a charter should be provided or not, as in some cases, other documents are also used to draft the first project idea, i.e. ATS-IT initiatives uses a PSO (Purpose, Scope, Objectives)

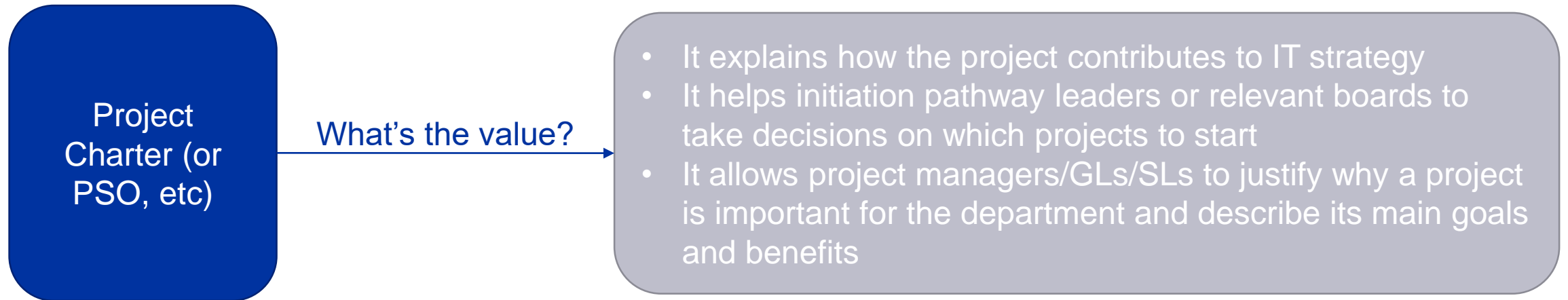
Initiating



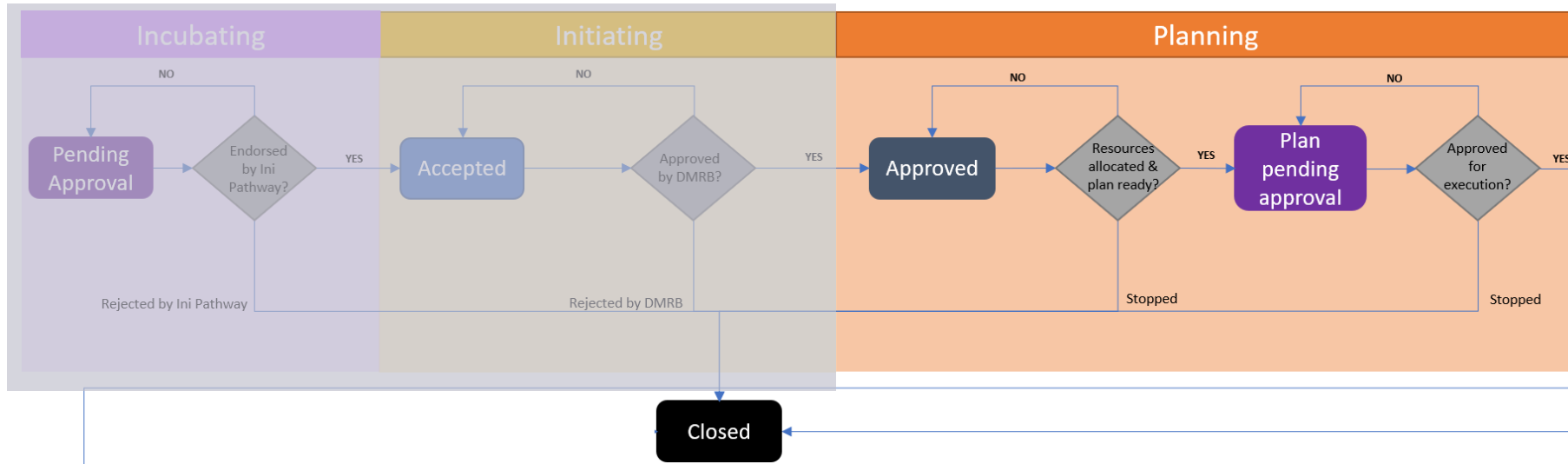
Roles	Responsibilities
Project Manager/GL/SL	Prepare a project charter and send it to the PMO
Demand Management Review Board	Approve, reject or defer projects on a monthly basis (*)
PMO	<ul style="list-style-type: none"> • Project charter quality check • Admin tasks (update catalogue and document repository) • Input for DMRB and follow-up decisions

(*) DMRB members are DHO and Data and Architecture Leader

Incubating/Initiating



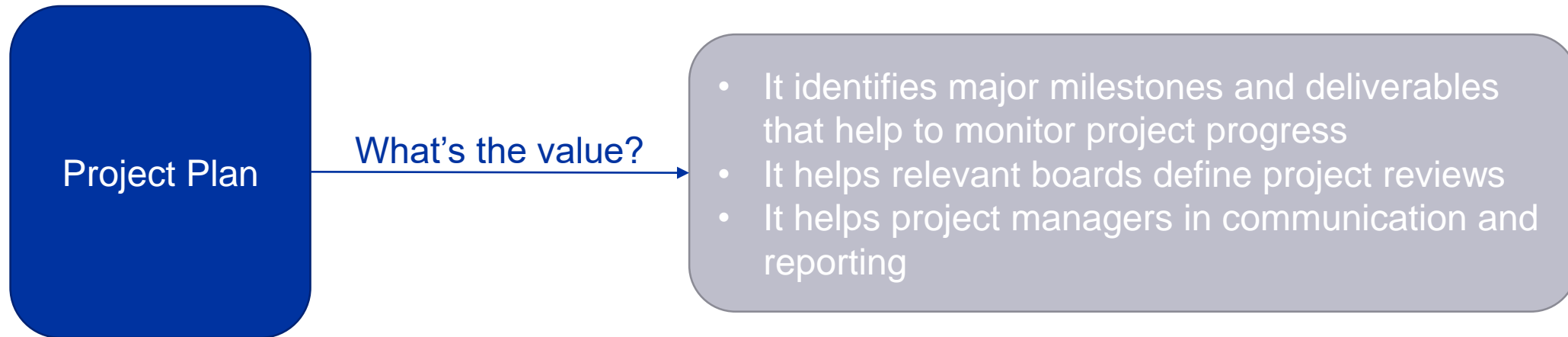
Planning This hasn't been put in practice so far



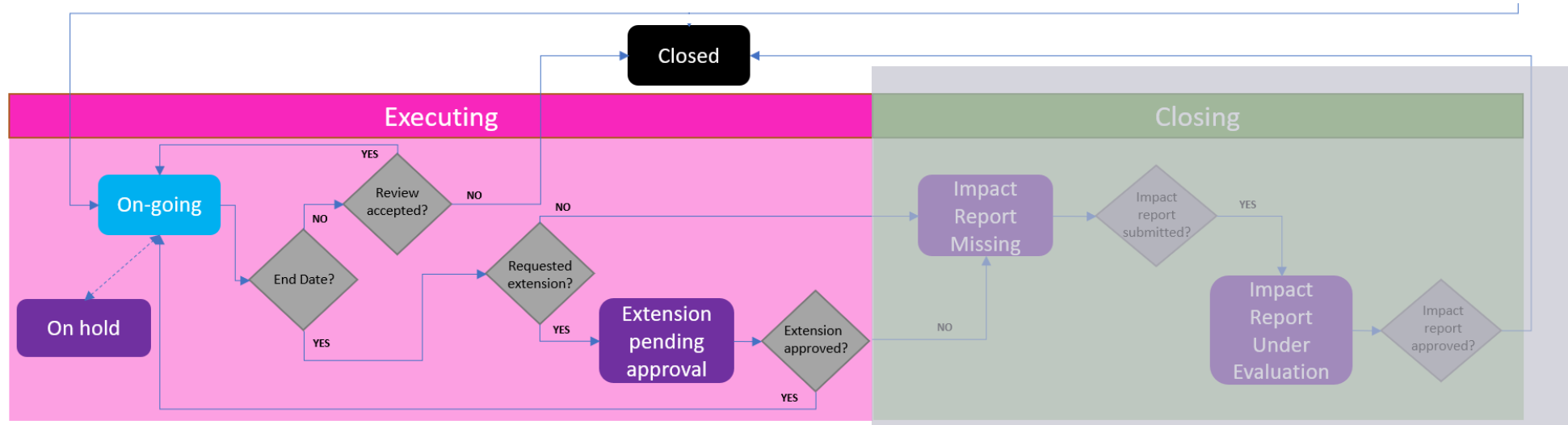
Roles	Responsibilities
Project Manager	Provides a project plan
IT-RM	Allocates resources
Project Portfolio Review	Reviews and approves project plans
PMO	<ul style="list-style-type: none"> Input for PPR and follow-up on decisions Admin tasks (update catalogue and document repository)

(* PPR members are GLs, DHO and IT EU Office but PPRs are for the time being on hold and the mandate may be reconsidered)

Planning



Executing This hasn't been put in practice so far (except for extensions)



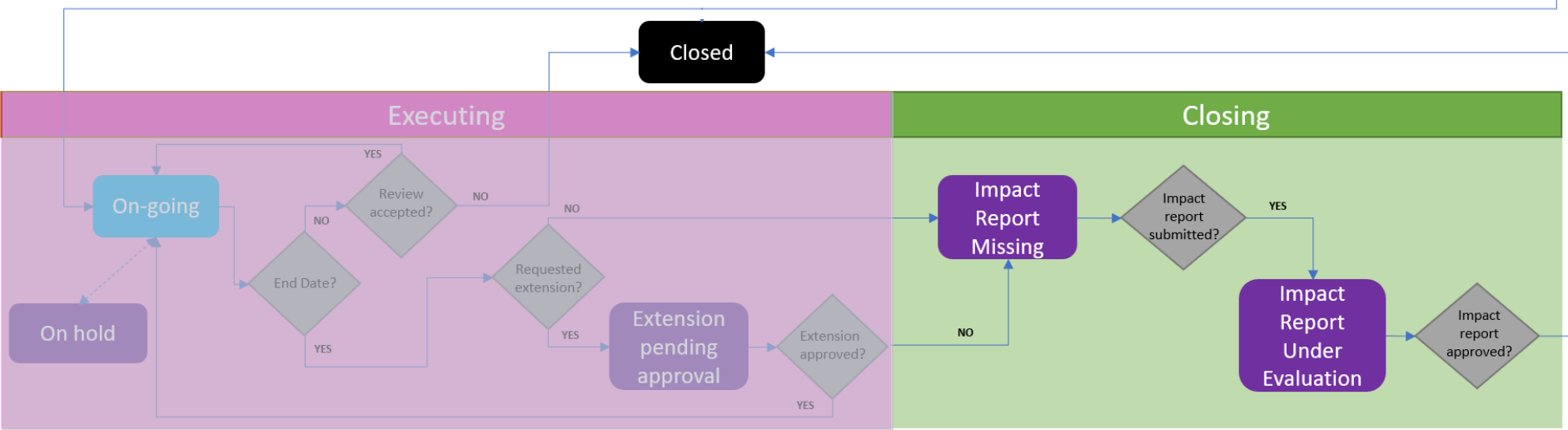
Roles	Responsibilities
Project Manager	Provides project reports Request extension at the end of the project, if needed
Project Portfolio Review	Reviews project reports
Demand Management Review Board	Approves project extensions
PMO	<ul style="list-style-type: none"> Input for DMRB and follow-up on decisions (project extensions) Input for PPR and follow-up on decisions (project reports) Admin tasks (update catalogue and document repository)

Executing



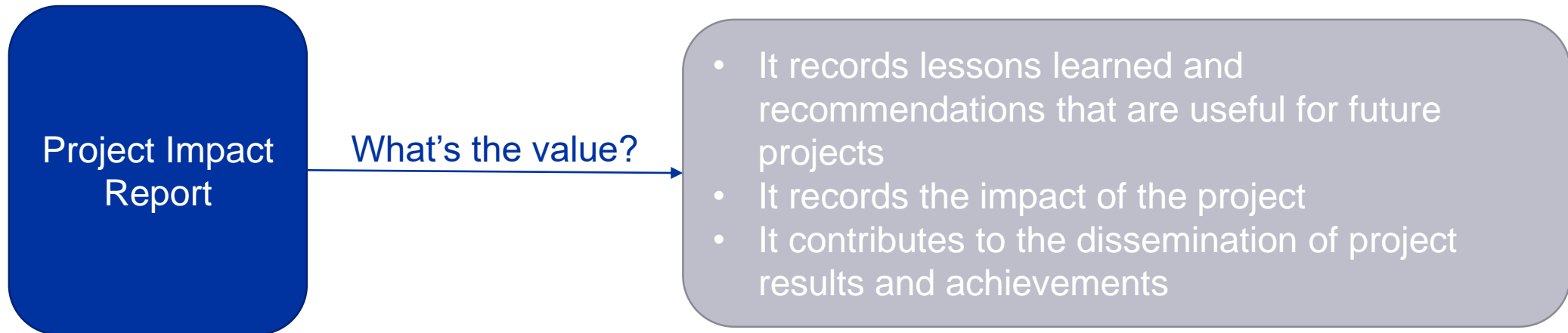
- How often?
 - To be decided!
 - Could a monthly report like the one EU projects do for ITSC be useful?
- What added value compared to the reporting already done at section/group/TD level?
 - Good point! Should project reports be reviewed only on a single place i.e. PPR?

Closing



Roles	Responsibilities
Project Manager	Provides impact report
Initiation Pathway Leaders	Review and approves impact report
PMO	<ul style="list-style-type: none"> Impact Report quality check Admin tasks (update catalogue and document repository)

Closing



- PMO is working with ITTF to organize short presentations when projects are closed
 - Grouping a few of them together
 - Once we receive the impact report → Many closed projects haven't submitted the impact report

Change Requests

- **The following changes to projects need to be assessed and approved**
 - Start Dates (i.e. if the project start will be delayed)
 - End Dates
 - Involved personnel
 - Scope, major milestones and major deliverables
- **Although we have produced a Change Request template, for the time being you can inform the PMO and PMO provides this information to DMRB**

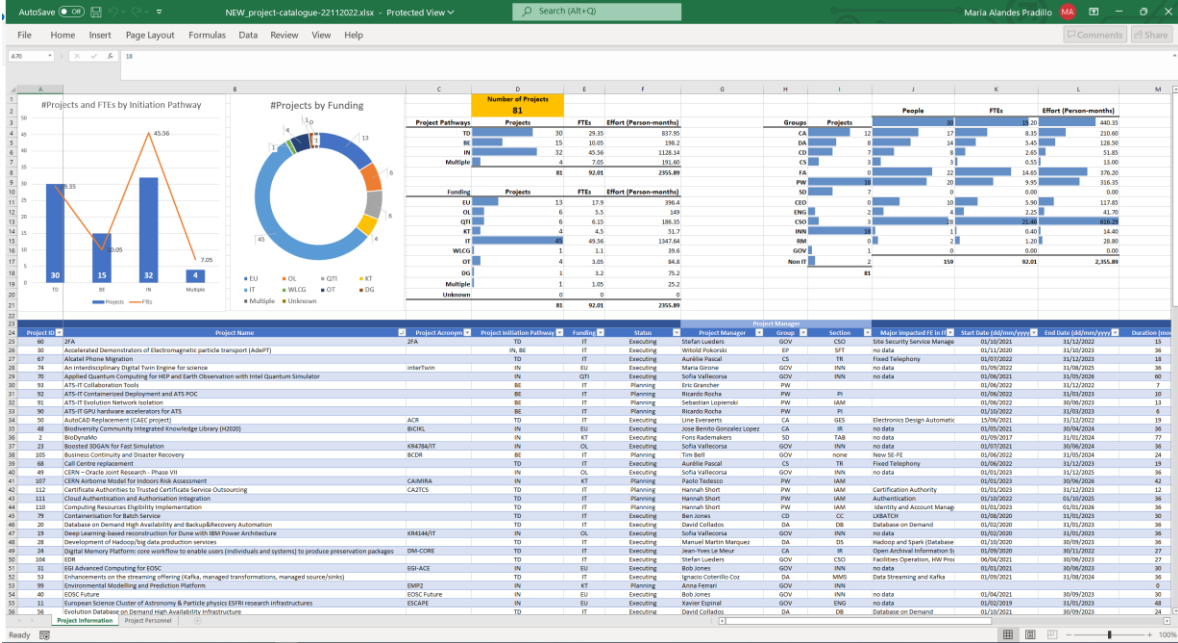
And what happens after closing a project?

- **What happens if a project becomes a service at the end?**
- **How is the change management done at that point?**
- **What are project managers supposed to do once a project is closed?**

- **These are still open questions!**

Project Catalogue

- 3 catalogues available on an on-line spreadsheet
 - Pending approval
 - On-going
 - Closed
- Basic project and personnel information based on project charters
 - Only the PMO can update the catalogue
 - For the time being, project changes need to be communicated to the PMO to be reflected in the catalogue

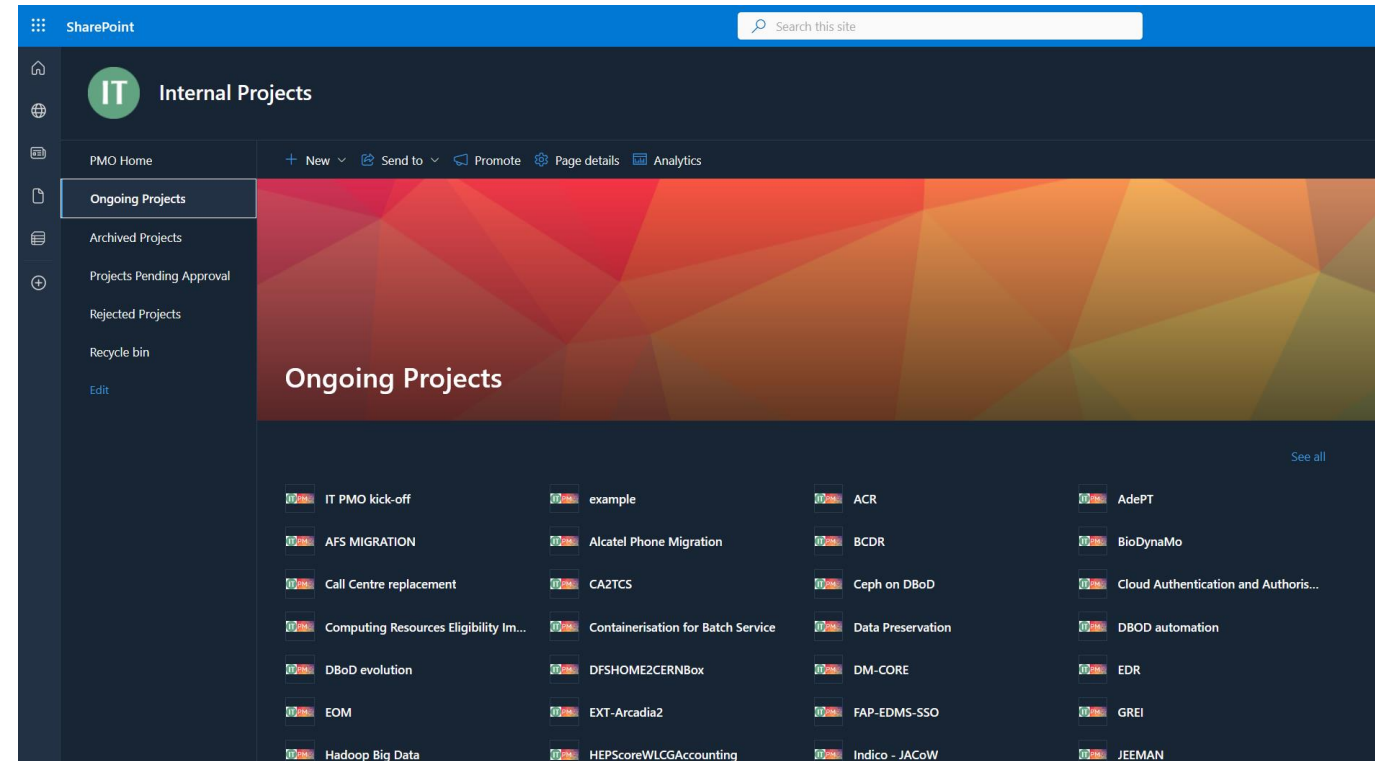


<https://cern.sharepoint.com/sites/it-project-office/>



Project Documentation Repository

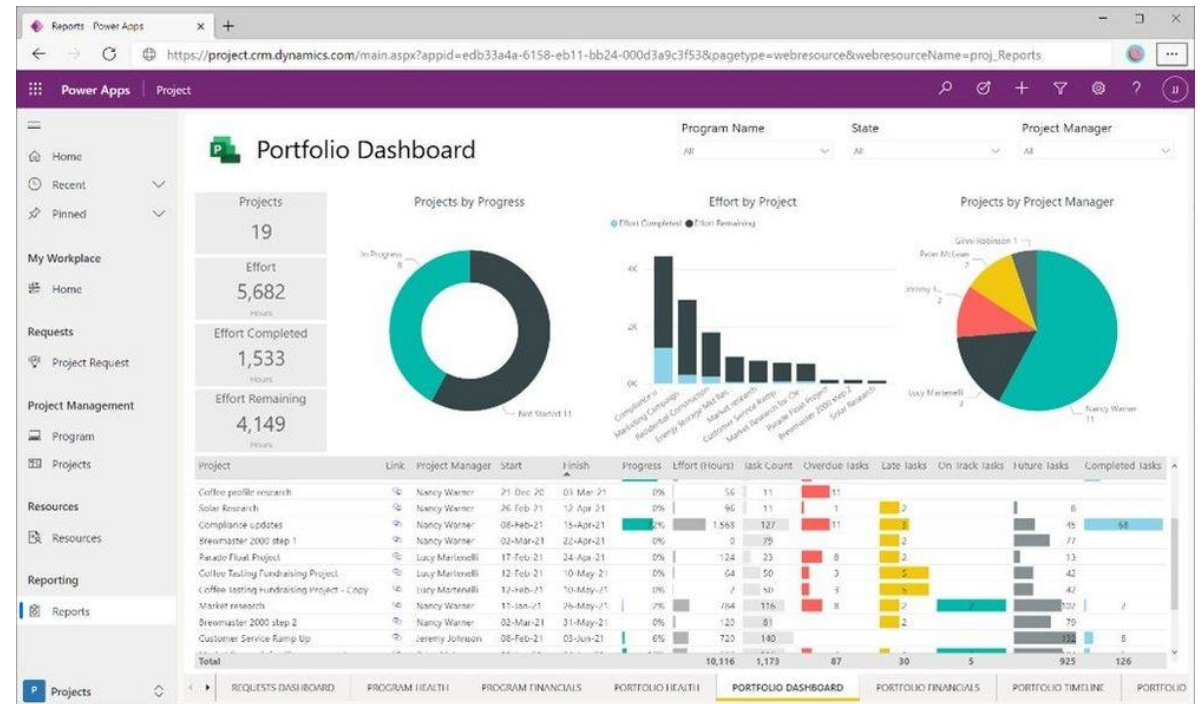
- Based on Sharepoint Online
- One space per project
- Project teams can use it to store all relevant documents for their projects



<https://cern.sharepoint.com/sites/it-project-office/>

PMO Tool

- **PMO has reached a stage where it's challenging to continue working with spreadsheets**
 - Maintenance is cumbersome
 - It's not possible to open the catalogues to others outside PMO and ensure data quality at the same time
 - There are no means work with the project lifecycle in a dynamic and collaborative way
- **The PMO has started to evaluate MS Power Platform**
 - This is part of the M365 applications
 - It allows to create applications, dashboards and reports



Next steps: Community of Practice

Set up a project manager's community of practice

- **Agree on best practices**
- **Shared lessons learned**
- **Identify training needs**
- **Proposal:**
 - Meet bi-monthly
 - Possible agenda:
 - PMO news
 - Lessons learned/presentation by a project manager
 - Open discussion on some topic
 - Your ideas are welcome!

Next Steps: Project Plans

See next presentation

Conclusion

- **The PMO is a supportive entity which liaises project managers and IT management**
 - To provide common practices
 - To support decision-making
 - To provide a platform where project related information is available for everybody
- **2022 focus:**
 - PMO creation
 - Understanding of governance processes (top-down)
 - Basic project catalogue and set of templates
- **2023 focus:**
 - Project manager's community of practice
 - Consolidation of governance processes (bottom-up)
 - PMO tool and consolidated set of templates



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