From Audit to Assurance – a journey to establish a new PMO Q&A, Mark Chapman, 24/05/22	
Questions	**Answers**
I saw Excel, SharePoint, PowerBI and have heard Jammer is used. What would Mark say is the main tool/system used to support this?	The main tool in terms of supporting the PMO is probably excel. The communication tool is called Yammer and it is an internal social support system where we set up a community of practitioners. In our case anyone involved in PPM can sign up as a member and then they see anything anyone posts on that yammer group which is a great way of communicating out to a lot of people. PowerBI is used to drive our dashboards which is very slick and customer focussed as it allows the dashboards to be 'drillable' so anyone can click on something they like to know more about and it expands the detail around that element.
What reporting infrastructure do ytou have to go from PMW to the dashboards?	In order to drive the performance dashboard, project managers are required, when a project starts to provide the details of that project so we set it up on the dashboard then every month they fill in a form that is in microsoft 'Forms'. The information from there is converted automatically into an excel spreadsheet and it is that which is read by PowerBI to form the dashboards. It wasn't easy to set up but is worth it as the funtionality we have in the dashboard is customer centric and makes the whole performance base visible to all.
How did you progress the stakeholder perspective on the PMO to move from being Controlling to being Supportive?	We held workshops with our Executive Team (Directors) as the key stakeholder group. We also listened to the needs of the project practitioners. So we heard the directors needing assurance that projects were well managed and that there was 'one version of the truth' when it came to performance, and we heard practitioners saying they needed support and guidance. Neither view was wrong so we had to develop a PMO model that met both needs.
Did you have any resistance to implementing the PMO? If so, what were the key challenges and how did you overcome them?	We did in pockets. This was the value of having a large 'user group' in the project team. Each member acted as an ambassador for their part of the business and so had a voice in how the PMO was set up. Obviously decisions did not please everyone all the time but by having a transparent process for listening to the business, giving them a place on the project and being part of how the project board then had to decide how things developed meant they could go back to their part of the organisation with the decision and knowledge of how that was arrived at - fairly and openly.
How do you monitor and manage stakeholder engagement throughout the project lifecycle?	In terms of the project for setting up the PMO, the stakeholders were all internal so they were engaged at the project board and through regular communications out to the wider business. We did this through monthly management meetings and through articles on our internal intranet pages.
How many people are in the PMO?	Currently we have 7 in the PMO - me as Manager, 2 who specialise in continuous improvement, a senior advisor who supports me in the management of the PMO and 3 advisors who support the PMO processes, assurance work and reporting
What was involved in the discovery phase, and how long did it take?	The discovery phase was all about finding out exactly what the current position was - what projects we did, where, by whom, how much, what process they followed etc. A lot of talking to people and requesting documents. We spent 3 months with the consultants in this phase and it was absolutely time well spent.
how is the PMO structured, size of team, no. of central PMs vs. depatartment based .	Currently we have 7 in the PMO - me as Manager, 2 who specialise in continuous improvement, a senior advisor who supports me in the management of the PMO and 3 advisors who support the PMO processes, assurance work and reporting. We operate a central service PMO and all the project practitioner staff are out in the business - the PMs are not in direct control of the PMO
Which element of the PMO was most challenging to implement and why?	Probably the reporting system, the dashboards. Technically it is complicated. Culturally, projects don't like spending time on reporting, they prefer the doing! So it has to be in their interests to report. Having the dashboards available and visible to anyone in the organisation gives that reason - they do not want to be the project that has no reporting. And because senior managers access the dashboards, if they become concerned they will request that the PMO investigate.
Do you use specific PM software to produce your Gantt and task lists i.e Microsoft Project or P6 Primavera looks like most of the PM workbook data could be condesnsed for example via Project server views	At the moment no, the workbook is all excel based. We do recognise that with maturity we should have a single project management system that supports the needs of the project managers and the PMO that also holds the financial information and contract side but that is for the future.
Which programme or platform do you use to generate the PMO dashboard please?	The dashboard is in PowerBI. It is fed from data on an excel spreadsheet which in turn is fed on a monthly basis from information put into microsoft Forms
How many staff members in PMO are contractors/consultants from supply chain?	Currently we have one contractor working part time in the PMO who helps me carry out project health checks
What does the structure of your PMO team look like please Mark?	Currently we have 7 in the PMO - me as Manager, 2 who specialise in continuous improvement, a senior advisor who supports me in the management of the PMO and 3 advisors who support the PMO processes, assurance work and reporting. We operate a central service PMO and all the project practitioner staff are out in the business - the PMs are not in direct control of the PMO. We also have one contractor working part time in the PMO who helps me carry out project health checks
I just wanted to know what kind of organizational structure support establishment of PMO.	We operate a central PMO that sits outside any project delivery function
How do the project teams do self-assurance for LoD1?	LOD1 is all about the team understanding what their role is - no 'rabbits in the headlights'. So we ensure they understand the requirements by holding monthly webinars. All the project templates also have a guidance document to help them fill it in. We also provide simple checklists so they can self-check that their documents are ready before submitting for assurance. Even, just having the PMO there and willing to give advice is supporting LOD1.

Very interesting that the list problems is very similar to the issues that I identified in my first audit of project management in Transport for London 20 years ago.	Yes I find sharing at these sessions very reassuring - organisations very often face the same challenges
Re the PM workbook: how do you weigh up the benefits of using this approach, with the potenital risks of keeping this data in a spreadsheet (& not on a central PPM database)?	The workbook is a tool to support the PMs and ensure they meet all the policy requirements. It does not negate them keeping more detailed documents to support their project. Its an aid, not an added burden
What challenges did you face when embedding the PMO into your wider Portfolio/Project team? E.g. managing their expectations, managing the changes the PMO were embedding. How did you overcome them?	Having the discovery phase was crutial. If we had just invoked what we originally thought we needed we would have installed the wrong PMO. Publishing the findings of the discovery phase internally also showed transparency. Then having a wide section of the business as senior users in the project ensured buy-in and gave them a voice at the table. Open communications throughout the project also helped.
Procurement seems to be the key split between each runway?	The runway split is around project cost and risk. The cost also includes ALL elements including internal staff time which is calculated.
How do you manage version control within this process for project documentation? Any hints and tips?	This has been a key success for us - we have a central document management system and we have a single folder on there where we put all the PMO documents, guidance, templates etc. We change them as needed whenever necessary and tell the business to always go there for their needs. Our DMS does actually also log all history (who alters what, when etc - so we don't need to log version control)
How have you managed change within NRW when this was implemented? Internal appetite for change?	The PMO change was led by our CEO, Clare which really helped. The key to managing it was communication and involvement. So we had a message and direction set by the top and we involved staff in the delivery
How was the PMO Dashboard set up?	The dashboard is in PowerBI. It is fed from data on an excel spreadsheet which in turn is fed on a monthly basis from information put into microsoft Forms
Did you consider buying a specialist software tool for risks/issues/actions/reporting etc., rather than using spreadsheets?	We did but the timescales were such that we had to utilise what we had to meet the deadlines put on us by our Board Audit Committee, remembering that the original drive to establish the PMO was from an unsatisfactory audit.
Where does LOD1 to 3 come from? Is it from a quality or project standard?	It seems to have an origin in audit and I understand it has been around as a model since the 1950's
What software tools do you use for a PMO of your size?	Nothing special at the moment - we are still excel centric!! But we do use PowerBI and Microsoft Forms for the dashboards
The dashboards look really well designed and visually appealing - is it Excel/Sharepoint?	The dashboard is in PowerBI. It is fed from data on an excel spreadsheet which in turn is fed on a monthly basis from information put into microsoft Forms. You need PowerBI for the dashboards to be 'drillable'!
What is the PMOand IPAG independent of (and what was IPAG?)?	IPAG is the Independent Project Assurance Group. The PMO and IPAG are independent of any project delivery. We do not deliver any projects and we do not approve anything - we assure everything!!