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### PMO Assessment

This evaluation will help you understand the style and maturity of your organization's Project Management Office. The result will also provide a roadmap for your effort to accomplish your future goals.

#### Current Type of PMO

| **Supportive PMO** |  | Provides support in the form of on-demand expertise, templates, best practices, access to information and expertise on other projects, and the like. This can work in an organization where projects are done successfully in a loosely controlled manner and where additional control is deemed unnecessary. If the objective is to have a sort of "clearing-house" of project management information across the enterprise to be used freely by project managers, then the Supportive PMO is the right type. |
| --- | --- | --- |
| **Controlling PMO** |  | Used in organizations where there is a desire to "reign in" the activities, processes, procedures, documentation, and more. Not only does the organization provide support, but it also requires the support be used. Requirements might include adoption of specific methodologies, templates, forms, conformance to governance, and application of other PMO controlled sets of rules. In addition, project offices might need to pass regular reviews by the controlling PMO, and this may represent a risk factor on the project. This works if a) there is a clear case compliance with project management organization offerings will bring improvements in the organization and how it executes on projects, and b) the PMO has sufficient executive support to stand behind the controls the PMO puts in place. |
| **Directive PMO** |  | This type goes beyond control and actually "takes over" the projects by providing the project management experience and resources to manage the project. As organizations undertake projects, professional project managers from the PMO are assigned to the projects. This injects a great deal of professionalism into the projects, and, since each of the project managers originates and reports back to the directive PMO, it guarantees a high level of consistency of practice across all projects. This is effective in larger organizations often matrixing out support in various areas, and where this setup would fit the culture. |
| **Other** |  | The above three types do not adequately describe my PMO. See responses to PMO Responsibilities for further clarification. |

#### PMO Responsibilities

| **Misc.** | |
| --- | --- |
|  | Working on process definitions, but no released yet |
|  | PMO only in place to offer assistance |
| **Intake** | |
|  | Defined project intake process with scoring and prioritization |
|  | Intake process aligns project request with business strategies |
|  | Ensure each project has a Sponsor and Stakeholders are identified |
|  | Project intake process requires a business case and project summary |
|  | Assist to define a project's Critical Success Factors |
| **Process** | |
|  | Develop project methodologies, best practices, and standards |
|  | Develop project policies and procedures (organizational process assets) |
|  | Define project schedule/roadmap standards including activity types such as tasks, deliverables, milestones, gates, etc. and baselining the schedule/roadmap |
|  | Project approvals needed during the project lifecycle are identified along with the roles needed for approval. These approvals are included in the schedule/roadmap templates. |
|  | Project Communications expectations are documented, and a Project Communications Plan template is created to be updated and provided to all project stakeholders |
|  | A project team collaboration process is created and followed (Chat, daily standup/Scrum, tools, etc.) |
|  | Develop schedule/roadmap and project document templates (organizational process assets) |
|  | Clear process defined and enforced for requirements 🡪 Use Cases 🡪 Test Cases 🡪 Test Plan |
|  | Define a clear project change request and approval process including a change request template |
|  | Define project finance process to manage and report on project costs/benefits |
|  | Define project scope process to provide detailed scope, ensuring the scope can be frozen and baselined at the start of the project |
|  | Consistent Status Template created for all types of activities |
|  | Define project quality standards and how to report on current quality vs. baseline |
|  | Define a review process with the ability to kill underperforming projects |
|  | Define risk assessment and management standards |
|  | Risk Management Plan created by the PM and reviewed by the PMO |
|  | Define Issue management and escalation process |
|  | Coordinate communications across projects |
| **People** | |
|  | Coach, mentor, and train to build project management skills |
|  | Ensures project roles, responsibilities, and teams are formally defined |
|  | Managed shared resources across all projects (especially PMs) |
|  | Allocates PM resources |
|  | Define project team career paths including skills needed at each level |
| **Status** | |
|  | Gather and track Financial Management reporting including variances of estimated, budget, and actual costs/benefits |
|  | Facilitates the process to report project status and provide real-time status to all stakeholders |
|  | Considers business impact of poor project performance and is proactive |
|  | Provides project oversight throughout the project phases |
|  | Monitor compliance with project management standards, policies, procedures, and templates via project audits |
|  | Review projects periodically and re-evaluate project score and priority with the ability to kill underperforming projects |
| **Other** | |
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#### PMO Performance

|  | Always | Sometimes | Never | Not Sure |
| --- | --- | --- | --- | --- |
| Project policies and practices in place for each project |  |  |  |  |
| Best practices being used for each project |  |  |  |  |
| Lessons Learned and other historical data is reviewed prior to the start of a project |  |  |  |  |
| Project templates be used to initiate a project |  |  |  |  |
| Project intake being used to score, prioritize and align project to business strategies |  |  |  |  |
| Project Business Case and Project Summary created for each project |  |  |  |  |
| Project Stakeholders identified, and Communications Plan created and in place for each project |  |  |  |  |
| During project lifecycle, standard procedures are followed as the project goes through its phases |  |  |  |  |
| Needed project approvals are gathered and logged |  |  |  |  |
| All issues are identified, logged, escalated when needed, and reported |  |  |  |  |
| All risks are identified, qualified, and quantified, with risk trigger event identified and risk management plan documented |  |  |  |  |
| Risks are reviewed throughout the project lifecycle with current status of trigger events provided to stakeholders |  |  |  |  |
| Project status is collected and reported on a regular basis using standard template |  |  |  |  |
| Job families created with skill needs defined for each role and level providing career progression guidelines |  |  |  |  |
| A process is in place to evaluate current skills and place people in the right role/level according to their skills |  |  |  |  |
| Mentoring and guidance is provided to ensure the project team is sufficiently prepared to begin and continue to work through the project most efficiently |  |  |  |  |
| Project requirements are gathered to create scope and use cases. Scope is documented, approved and frozen. |  |  |  |  |
| Project requirements are gathered with a documented progression of Requirements 🡪 Use Cases 🡪 Test Cases 🡪 Test Plan = Quality Plan |  |  |  |  |
| There is communication among the project team to make all aware of status, issues, and change requests |  |  |  |  |

| % of your projects completed on time? |  | 75%-100% |  | 50%-75% |  | 25%-50% |  | 0-25% |  | Not sure |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |

#### Number of staff and roles assigned to the PMO?

| # of FTE | Role |
| --- | --- |
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