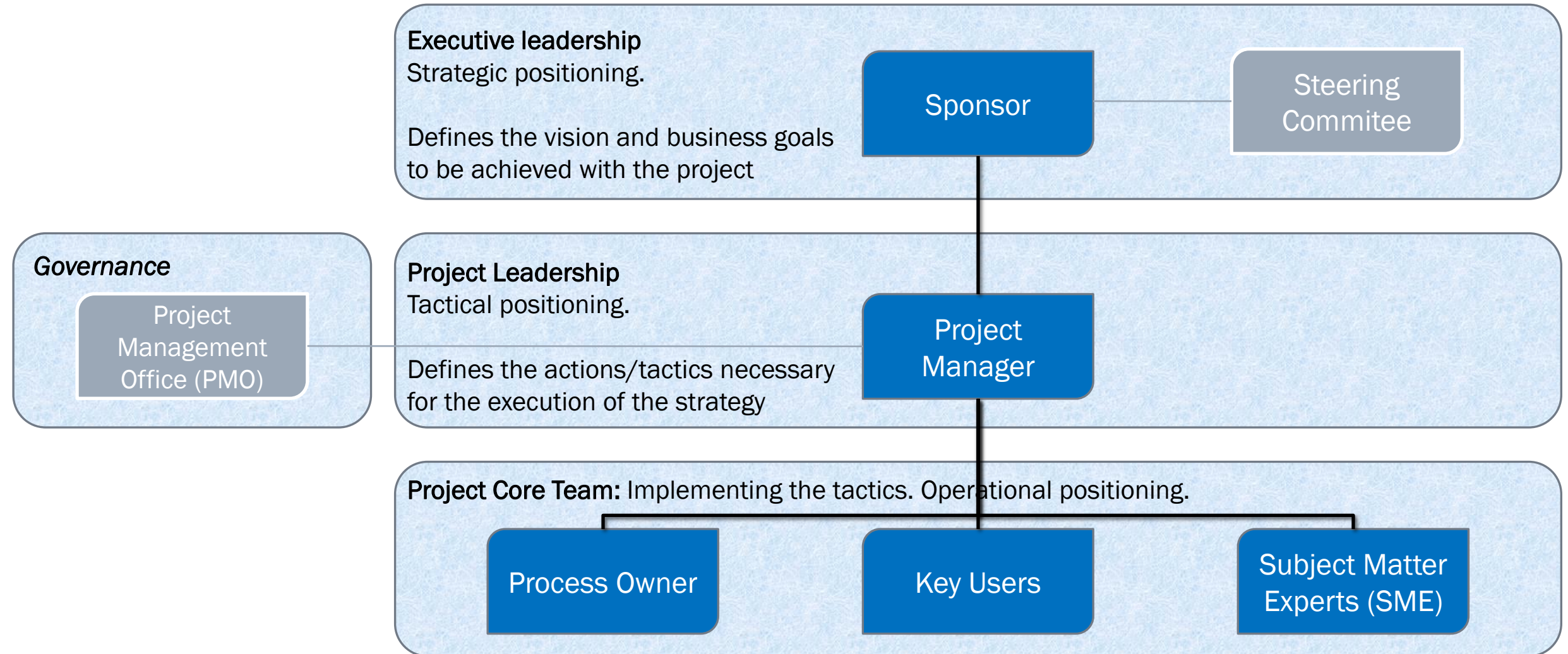


Roles and responsibilities

The importance of everyone knowing their role and mission in the project!



High-level structure of the various roles



Roles and responsibilities

Project Management Office (PMO) – na exercise of *governance*

- Mission: to guide and support the organization in developing its projects in the most efficient and effective way to achieve the strategy.
- Organizational unit: the entity that issues project management policies, practices, and guidance for the organization. Ensures the integration and coherence of project management practice throughout the organization.

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Compilação e Report do status do Portefólio / Programas e Projetos



Gestão da "Saúde" do Portefólio / BI & Analytics



Tracking do Retorno do Investimento (ROI) / Mudança cultural



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G

Desenvolvimento e aplicação de normas, métodos e processos



Gestão do Talento / Afetação dos gestores de projeto / equipas



Gestão das interdependências no "Delivery" dos Projetos



Roles and responsibilities

Project Management Office (PMO) – delivering value

Key Performance Indicators (KPIs) related to PMO activity:

- Definition of metrics for internal/external customer satisfaction and respective measurement and tracking
- Increase in the number of projects aligned with strategic projects
- Increase in resource productivity (project management elements)
- Reduction in the number of cancelled projects
- Cost reduction/savings per project (increased efficiency of the management process)
- Increase in the number of projects delivered within budget
- Increase in the number of projects delivered on time

Roles and responsibilities

Project Management Office (PMO) – modes of operation

Modo de atuação	Descrição
Suporte	Its objective is to support project managers by providing templates, methodologies, best practices, and knowledge. Typically, applicable in organizations with a high level of maturity in project management practice.
Controlo	Appropriate when there is a need to increase discipline in all project activities, methodologies, procedures, and documentation.
Diretivo	<ul style="list-style-type: none">• Appropriate when there is a need to directly manage projects from the PMO.• The PMO provides resources and expertise and defines the allocation of project managers and teams.

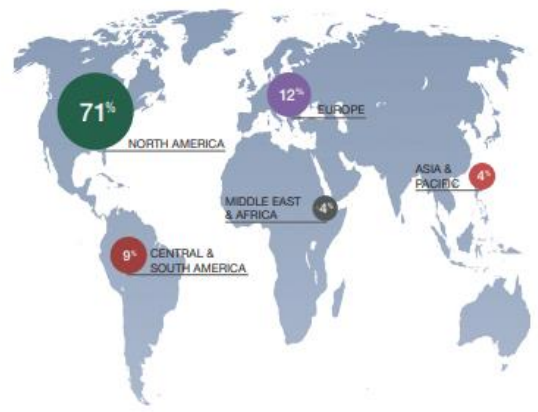
Roles and responsibilities

Project Management Office (PMO) – worldwide and in Portugal

Respondents by Industry



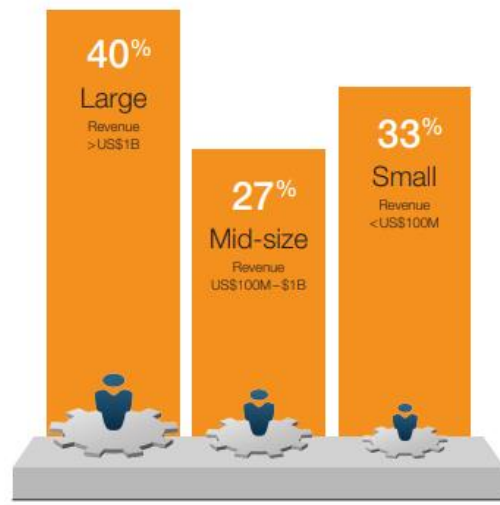
Respondents by Geography



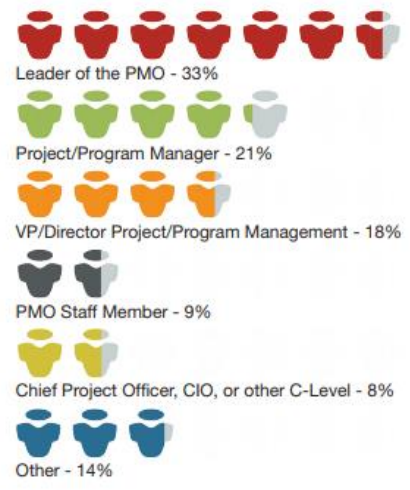
Organizations Participating

226

Respondents by Size of Firm



Respondents by Title



Key findings:

- 85% of organizations have a PMO.
- In 49% of organizations, the PMO reports directly to the C-level.
- The average seniority level is 10 years (high).
- In terms of average team size: 9 FTEs.

Source: The State of the PMO 2016: Enabling Strategy Execution Excellence - PMSolutions

Roles and responsibilities

Project Management Office (PMO) – worldwide and in Portugal

An example of PMO in Portuguese government

<https://www.espap.gov.pt/sppmo/Paginas/sppmo.aspx>



ESPAP

Entidade de Serviços Partilhados
da Administração Pública, I.P.

SP PMO em números



600 projetos acompanhados



25 M€ projetos geridos



6 anos de experiência



3 prémios: CIO Awards, Top 3 PMO do ano PMI –
Portugal Chapter, BSC Hall of Fame for Executing
Strategy

Roles and responsibilities

Sponsor – One of the most important project success factors.

Usually, it is someone from the board or first-line management.



Roles and responsibilities

Steering Committee (SC)



The Steering Committee is a temporary structure, specifically set up to provide guidance for a particular project.

Participants in the Steering Committee should include:

- Sponsor representing the 'business' interests of the sponsoring organization as a whole
- Senior representative(s) from the areas that will be impacted by the outcome and need to adopt changes; and
- Senior representative(s) from the organization(s) that will design, develop, and implement the solution(s). In the case of a project involving a key supplier, a frontline representative from the supplier may be part of the Steering Committee.

Roles and responsibilities

Steering Committee (SC)



The mission of the Steering Committee is:

- Create an environment where the project can succeed in delivering the necessary changes for the benefits to be realized;
- Define the project direction and approve major milestones;
- Approve the project's Go decision;
- Ensure appropriate resources, including investment needs: HR, outsourcing, equipment, etc.;
- Make decisions as needed throughout the project's life;
- Empower and authorize the Project Manager to lead the project on a day-to-day basis.

Roles and responsibilities

Outros *roles*

Role	Mission
Process Owner	Often referred to as the 'Voice of the Customer.' It should be a business representative, aligned with the project's functional objectives. They should have a comprehensive understanding of all functional requirements and share responsibility for their validation. The final decision regarding the validation phase closure rests with them. They may delegate these activities to Key Users appointed by them, retaining accountability for their actions and decisions. They are responsible for coordinating the key users. In Scrum, this role is known as the Product Owner.
Key Users	<p>They should be business members and represent the first line of operators who will use the new system. They should be appointed by the Process Owner. They will be the target of training and will receive user manuals. They will be responsible for providing training to other users not part of the project team (Logic Train the Trainer). They may participate in the approval process of requirements and validation (if delegated by the Process Owner). Depending on the business unit, project complexity, and scope, a key user may be appointed for each functional area. For example, Operations, customer support services, etc.</p> <p>At times, they may serve as focus groups, especially when the project involves significant UI/UX elements</p>

Roles and responsibilities

Outros *roles*

Role	Função e Responsabilidade
Regulatory & Compliance	<ul style="list-style-type: none">• Avaliar os impactos que alterações funcionais possam ter no compliance com boas praticas e guidelines adotadas, tais como GxP• Gestão de assuntos relacionados com licenciamentos e/ou alvarás necessários para o decorrer do negócio• Gestão da relação com entidades regulatórias <p>Muito importante em projetos em setores altamente regulados, como o setor farmacêutico, segurança alimentar, fiscalidade, <i>legal</i>, existência de certificações ISO, <i>automotive</i>, dados pessoais etc.</p> <p>Normalmente o papel é assegurado por elementos da área jurídica, Contabilidade, Direções Técnicas, Qualidade, DPO etc</p>
Gestão comercial	<p>Em projetos que têm origem num processo de venda, a participação de alguém da área comercial que participou, é importante para assegurar a correta passagem das expectativas do cliente: features, timings, planos de pagamentos alinhados com milestones etc</p> <p>Muitas vezes o comercial é chamado a gerir com o cliente desvios ao scope original, cobrança de trabalhos extra etc</p>

Roles and responsibilities

other roles – specialized tech functions in IT

- Front-end developer
- Back-end developer
- Full-stack developer
- Developer (.net, java, C++, python, node.js etc)
- UI/UX specialists
- Technical Writer
- DBA
- SAP consultants:
 - ABAP
 - Functional consultants FI, MM, SD, CO etc
 - Basis
- Business Analysts
- EAI experts (Tibco, Mulesoft, SAP PI/XI etc)
- BI experts (Qlikview, PowerBI, MicroStrategy etc)
- Data Scientist / Data Engineer
- Enterprise Architects
- QA / Testers
- Sysadmin (Datacenter, VMWare/Hyper-V etc)
- Networking engineers
- Cyber/infosec experts
- Cloud experts (Azure, AWS etc)
- Service Desk experts
- Etc

Stakeholders

Definition: "Individuals and organizations that are actively involved in the project, or whose interests may be positively or negatively impacted as a result of the project's execution or successful project completion."

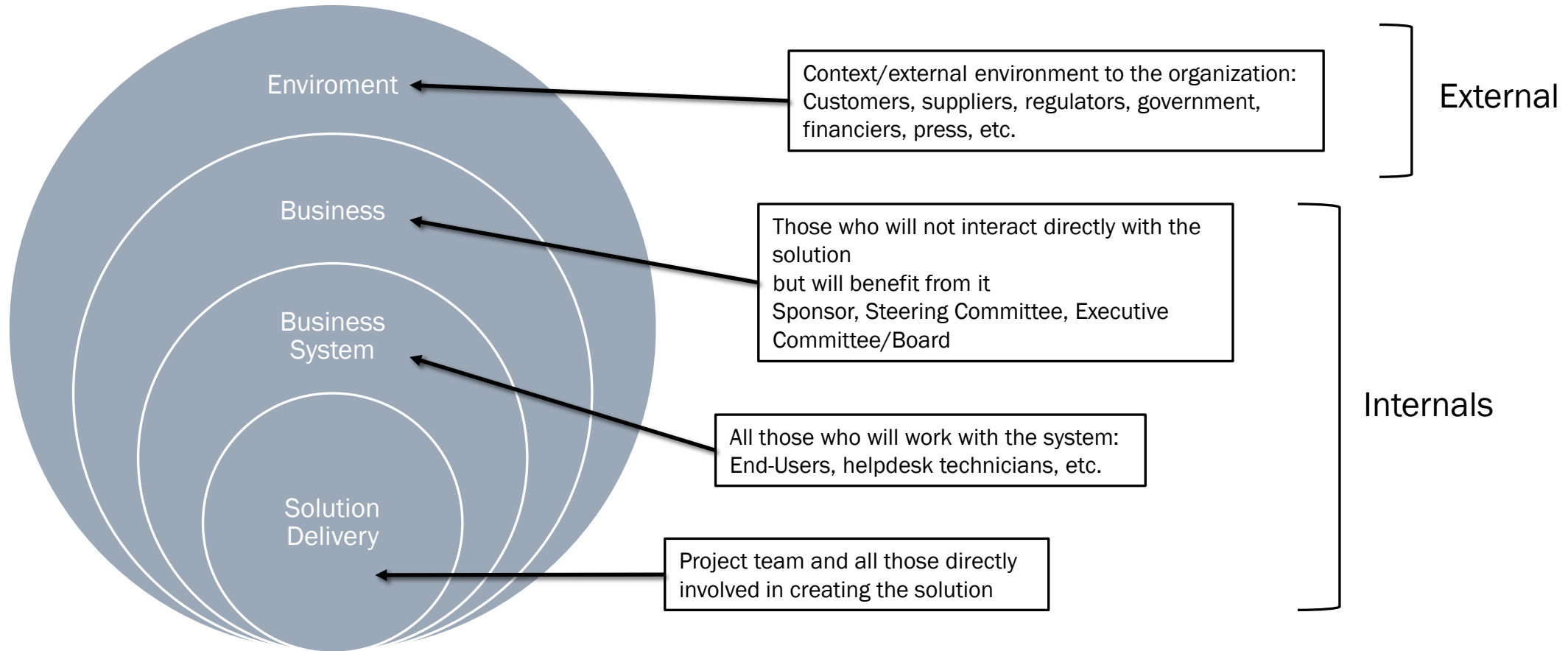
Project Management Institute (PMI®), 1996

It should be one of the Project Manager's priorities, in the early stages of the project, to conduct **stakeholder analysis**:

- Discover who the project stakeholders are
- Identify and align their expectations and individual impact on the project
- Consider the needs and expectations in project risk management
- Carefully plan the project's communication strategies (VERY IMPORTANT)

Stakeholders

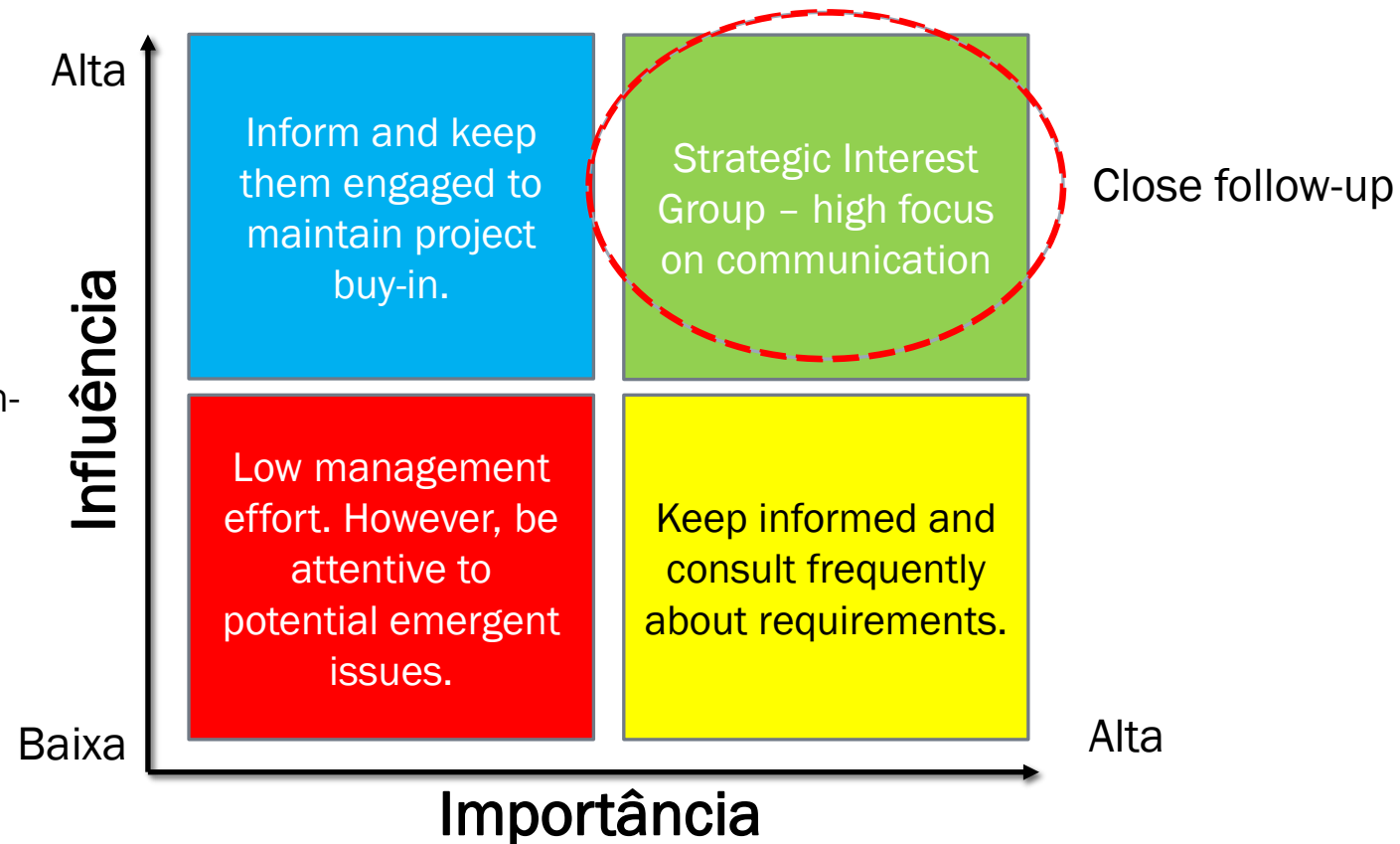
The 'onion diagram' is one of the most common ways to represent the result of the stakeholder discovery process and their relationship with the project:



Stakeholders

Correctly qualifying the stakeholder is essential for an effective communication strategy design. Each stakeholder should be classified according to their **IMPORTANCE** and their ability to **INFLUENCE** the success of the project!"

Influence indicates the power and ability to make key decisions in the project or even the capacity to influence other elements or stakeholders. For example, decision-making authority over financial investments.



Importance indicates the degree to which the project cannot be deemed successful if needs, expectations, and issues are not addressed. For example, the Sponsor.

Stakeholders

"A RACI matrix is one of the most commonly used tools to represent the communication strategy and the expected contributions to the project from each stakeholder. It is very helpful for the Project Manager to design the project monitoring meeting model and initiation ceremonies for the phases.

RACI represents the 4 types of positions a stakeholder may have in a project:"

Responsible – is responsible for the **execution** of the activity

Accountable – "Accountable: even though not responsible for execution, is liable'**We can delegate work, but we do not delegate responsibility**' for the results obtained. should be in the mindset of any professional with management responsibility."

Consulted – should be **consulted** to provide inputs for the activity execution.

Informed – should be **informed** of the result of the activity.

Stakeholders

Example of a RACI matrix for a simple software development project

Responsible									
Accountable									
Consulted									
Informed									
Project Tasks	Product Manager	UI Designer	Content Writer	Financial Analyst	Design Director	VP of Product	VP of Design	CTO	CEO
Initiation Phase									
Financial Study				R		A	I	I	C
Feasability Study	R					A	I	I	I
Planning Phase									
Technology Recommendations	R					C		A	I
Financial Plan				R		A	I	I	I
Sprint Plan	R					A			
Execution Phase									
Design UI		R			A	I	C	I	I
Write Content			R			A			
Create Mockup	R	C			I	A	I	I	I
Control Phase									
User Testing	R					A	I	I	I
Close Phase									
Create Lessons Learned	R					A			
Create Closure Report	R					A	I	I	I

Source: <https://www.projectmanager.com>

"A real example:

Migration of a core system, the Transport Management System, at a national logistics operator in their Freight Forward unit."



Unix

VS

Blujay

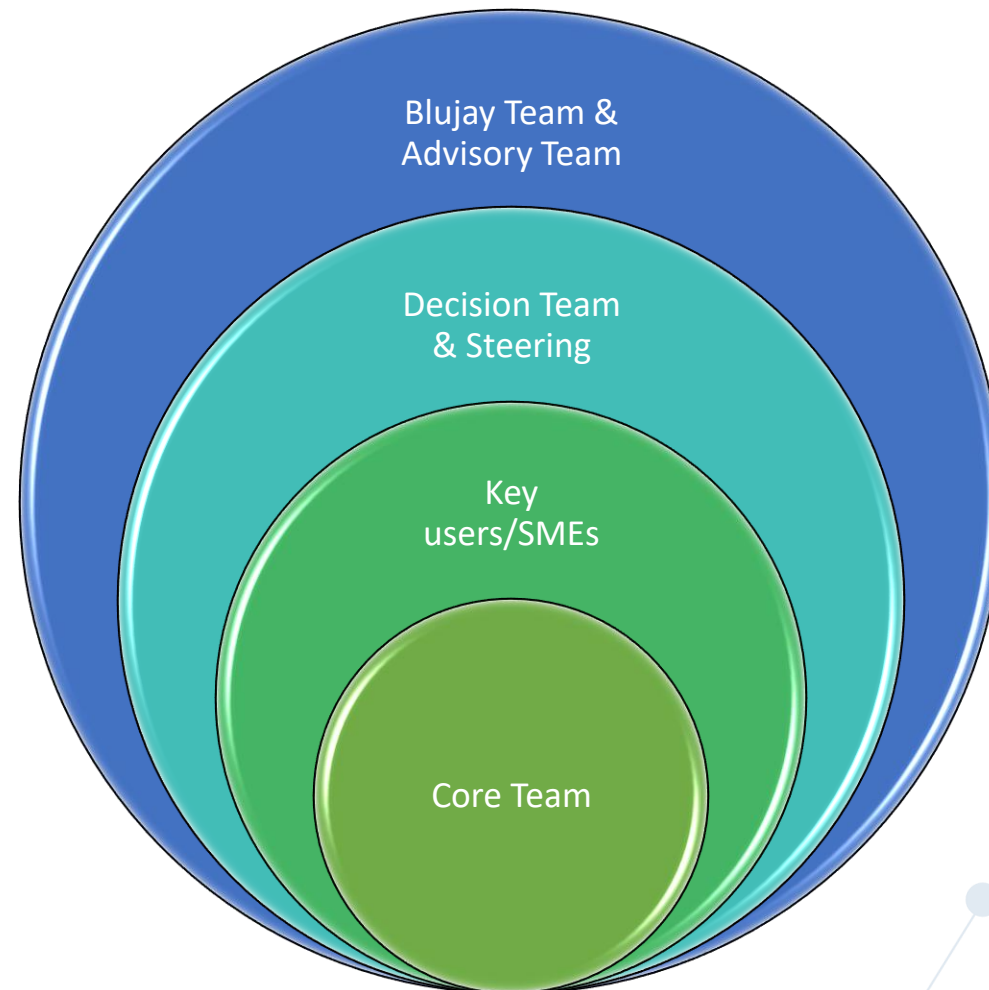
- Informix / 4GL
- Text terminal
- *On premise*
- Bespoke development
- Multiple distinct applications
- Low level of integration with external partners

- Java / Oracle
- UI Web Based
- Cloud / SaaS / AWS
- Off-the-shelf
- Integrated end-to-end solution
- High level of automation with external partners (carriers and agents, insurance, credit risk rating, etc.)

What changes in the IT department?

- We ceased to be software manufacturers (Buy Bot Build).
- Tracking the product roadmap and transferring identified improvement opportunities to the business.
- Management of the Blujay contract (SLAs and costs).
- Designing custom solutions for strategic clients.
- Maintenance of internal/external integrations.

Team and Governance Model



Team and Governance Model

Steering

Nuno Rangel
Luís Marques

Decision Team

Ana Maia
Miguel Cordeiro
Hélder Correia
Mário Silva
J. Miguel Oliveira

Blujay Team

Patrick Van der Westen
Glenn Leemans
Edwin Nouwen

Core Team

Project Team:

Ana Maia
Catarina Dias – Product Owner
Mariana Alves
Artur Ferreira
Marco Brito
Diogo Soares
Sandra Barbosa

SW Development Team:

Marco Brito
João Neto
Noesis TIBCO - André Cunha
Noesis TIBCO – João Dessain

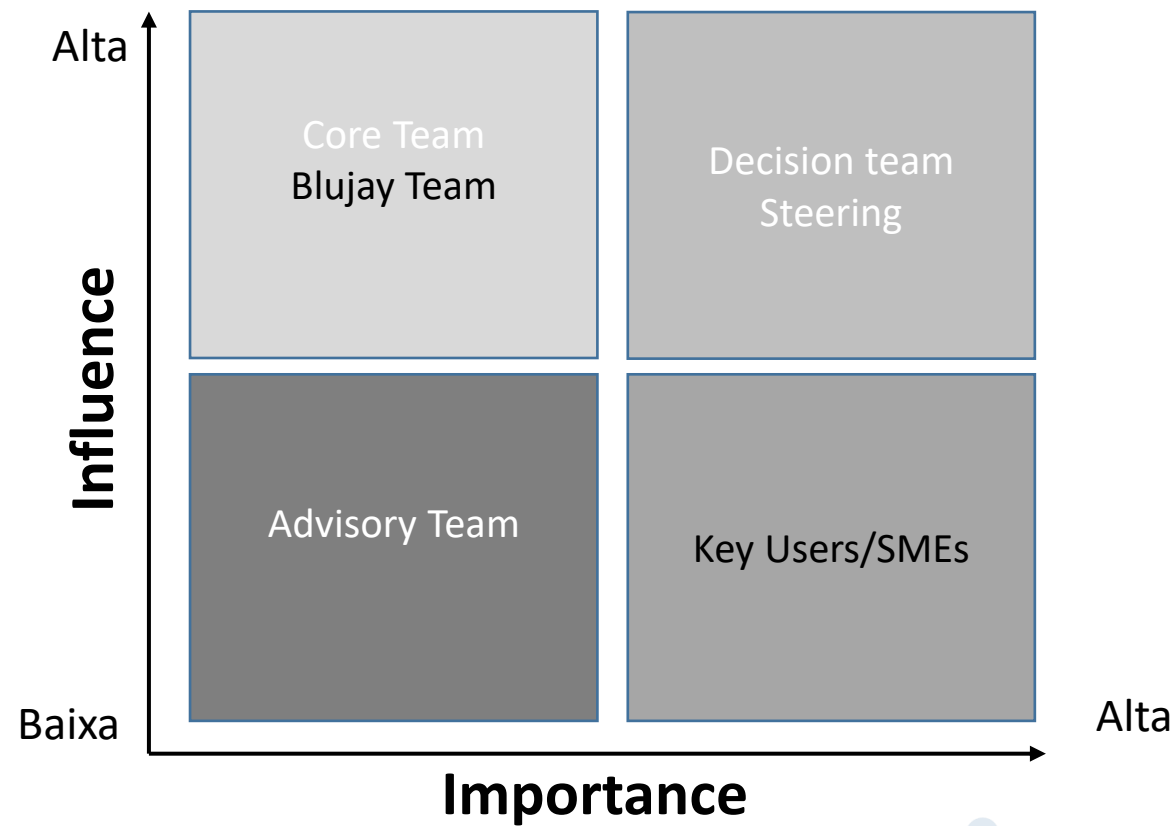
Key Users / SME

Catarina Dias – All scope
Mariana Alves – All scope
Artur Ferreira – All scope
Nelson Vidal – Export
Artur Cerqueira – Export
Franck Costa – Export
Elisabete Gaspar – Import
Daniela Pinto – Import
Cecilia Carvalho – Import
Susete Gaspar – Vendas
Gonçalo Palhinhas – Vendas
Paulo Jacinto – Export/Import
Isac Pereira – Contas a Receber
Liliana Rodrigues – Contas a pagar
Jorge Ferreira – Controlo Gestão

Advisory Team

Overland Manager – Luis Filipe Cavalheiro
Branch Manager Sul – José Jorge Fernandes
Advisory Técnico - João Granado
RDL 30/100 - Jorge Parente / Miguel Novais
Implementação Blujay FF- Júlio Borges
Implementação Blujay FF- Carolina Couto
Marketing - Carla Pinto
Global Sales - Ricardo Coelho
Reporting – Cristina Palmeira
RH / Formação - Protásio Leão
Qualidade - M^a Helena Costa
Legal - António S. Magalhães
Compras - José Rangel
Customs - José Rijo
Custom Critical - Filipe Ramos

Team and Governance Model



3. Equipa e Modelo de Governance

Matriz RACI - Responsabilidades

Equipa Deliverable / Tarefa	Steering	Decision	Core Team	Key Users / SME	Advisory Team	Blujay
Estratégia Macro do Projeto	A	R	C	I	I	C
Estratégia de Gestão da Mudança	A	R	R	R	C	I
Setup equipa de projeto	I	A/R	C	I	I	C
Business Case do Projeto	A	R	C	I	I	
Plano Projeto	I	A	R	C	I	C
Comunicação Interna e Externa	I	A/R	R	C	C	I
Gestão de Stakeholders	I	A/R	R	R		
Gestão Organizacional – desenho e implementação	I	A/R	R	R	I	
Formação		A	R	R		C
Desenho de processos âmbito do projeto		A	R	C	C	I
Desenho de arquitetura âmbito do projeto		A	R	I		C
Especificações funcionais e técnicas		A	R	C	C	I
Desenvolvimentos e setup sistemas			A/R	C		C
UATs			A/R	R		I
User Guides			A/R	R		
Go-Lives e Roll-outs	I		A/R	R	I	C
Fecho do projeto	I	A	R	C	I	I

Legenda

R	Responsible	responsável por executar a tarefa
A	Accountable	delega a tarefa mas revê e toma decisões quanto à tarefa
C	Consulted	consultado para dar inputs na tarefa
I	Informed	informado após decisão ou da conclusão da tarefa

3. Equipa e Modelo de Governance

	Responsabilidades	Modelo de Governo
Steering	<ul style="list-style-type: none">• Sponsoring do Projeto• Decisões estratégicas no projeto• Aprovação de alterações de âmbito, budget e plano• Acompanhamento da execução do business case	<p>Reuniões de Steering:</p> <ul style="list-style-type: none">• Frequência: mensal (ou superior se assim se justificar)• Participantes: Steering e Decision Team• Objetivo: Status do Projeto e aprovação de decisões estratégicas
Decision Team	<ul style="list-style-type: none">• Decisões Operacionais do projeto (incluindo processos To-Be)• Status de execução de âmbito, budget e plano• Promoção e definição da estratégia de gestão da mudança e envolvimento das restantes áreas• Gestão da relação com parceiro de software [DSI]• Desbloqueio de issues e gestão de risco	<p>Reuniões de Decision Team:</p> <ul style="list-style-type: none">• Frequência: semanal• Participantes: Decision Team e elementos da Core Team se assim se justificar• Objetivo: Status do Projeto e aprovação de decisões operacionais
Core Team	<ul style="list-style-type: none">• Implementação do projeto• Implementação da gestão da mudança• Desenho de processos as-is e to-be e arquitetura as-is e to-be• Especificação funcional e técnica• Configuração do sistema e desenvolvimento de integrações• Elaboração de manuais• Medição dos KPIs de projeto	<p>Reuniões de Gestão de Projeto:</p> <ul style="list-style-type: none">• Frequência: semanal• Participantes: Core Team• Objetivo: gestão de projeto operacional, alinhamento de atividades e identificação de issues a levar a equipa de Decision
Key Users / SME	<ul style="list-style-type: none">• Envolvimento no desenho de processos e especificações nas suas áreas de atuação (SME - subject matter experts)• Formação e desmultiplicação da formação para os restantes utilizadores (Key users)	<p>Envolvimento nas reuniões de projeto sempre que aplicável</p> <p>Envolvimento nas reuniões de Comunicação do projeto</p>
Advisory Team	<ul style="list-style-type: none">• Suporte em matérias específicas da sua área de atuação	<p>Envolvimento nas reuniões de projeto sempre que aplicável</p> <p>Envolvimento nas reuniões de Comunicação do projeto</p>