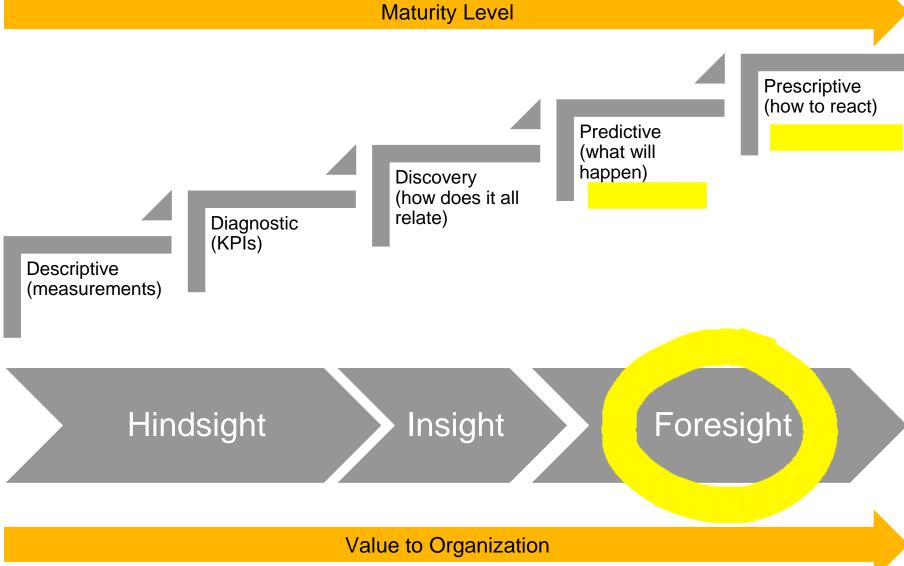
EPMO BUILD CONCEPTS AND EXPERIENCE

MY VISION OF EPMO



PROBLEM STATEMENT I RESOLVED FOR LEADERSHIP THROUGH EPMO

- How are we aligning our corporate strategy based on the demand generated by our clients?
- How are we tracking customer success? What are the KPI's
- Which business capabilities are in trouble? Which ones could be next?
- How is my portfolio / project delivery at client doing? How are we trending? How will my client portfolio end up doing?
- What do I need to know, review, evaluate, and possibly act upon the feedback we get from our customers?
- Is our internal knowledge being disseminated correctly throughout the company?
- When are the first indications that something may be amiss? Or that there are opportunities?
- Why didn't I see this coming?
 Why did projects fail in the past? Statistically, are there root causes for cascading effects?
- Who are the experts?

MY APPROACH TO EPMO

Building PMOs and managing client Portfolios

CHALLENGES FACED BY ORGANIZATIONS

Poor management of

Inappropriate allocation of resources

investment cycle

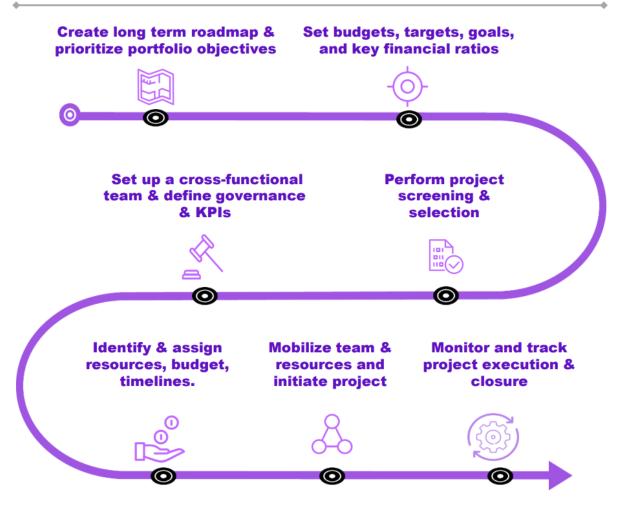
O → O Limited collaboration among teams

Reactive tracking & mitigation of risks & issues

Improper project evaluation

Slow & ineffective decision making

KEY PPM* ACTIVITIES FROM PROJECT INITIATION TO EXECUTION



BENEFITS

Greater FINANCIAL
TRANSPARENCY of the portfolio

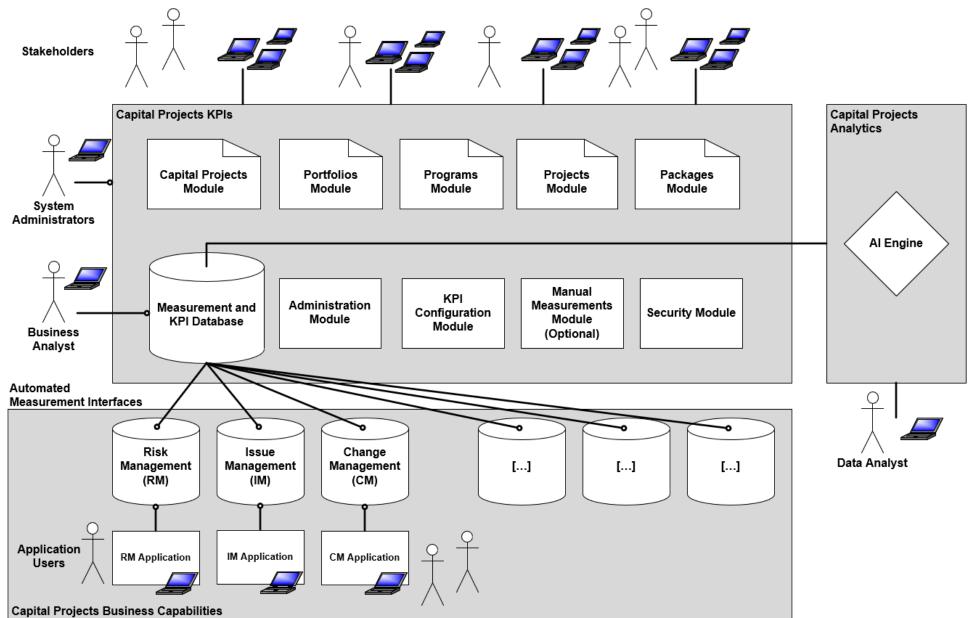
CENTRALIZED REPORTING of activity with all stakeholders

GREATER CONTROL & PREDICTABILITY with integrated vision of projects

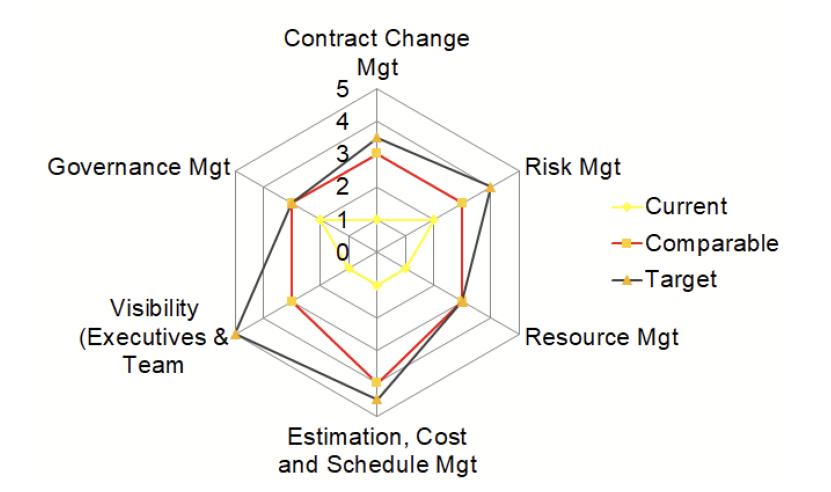
Improved **ADHERENCE TO KPIS** with automated tracking & better risk resolution

IMPROVED CASH FLOW through centralized reporting and invoicing

BASIC ARCHITECTURAL BLUEPRINT



WHERE ARE WE NOW? TRADITIONAL MATURITY LEVEL > 6 FACTORS TO LOOK AT...



Example of possible key challenges?

- Is it that there is no global adherence to PM Best practices / Tools / Discipline?
- Is it that the is no single resource pool and no Resource Allocation done?
- Is it that the projects never really have a proper Closeout phase?
- ➤ Is it lack training or tools available? Or both?
- ➤ Tools don't support risk process and maturity
- ➤ ETC...

Agility & Digital transformation as it relates to how to running ePMO

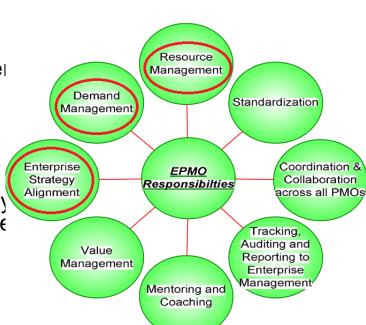
(1) Demand Management / (2) Enterprise Strategy Alignment / (3) Resource Management

There needs to be alignment between Division strategic initiatives and the PMO – that includes ranking, risk management / mitigation, determining dependencies and constraints → So moving towards an ePMO and not just a business Unit PMO

A system needs to be in place prioritize and rank the projects based on fair and impartial mechanisms, considering the following (NPV, ROI, CAPEX and OPEX \$ request, Business Value both tangible and intangible, etc.)

I would make sure we implemented a process where the Program and Project Manager to lead the business case process from the initial stages and work with the Division's functional and technical teams to determine the Business Value proposition (that way we can be held and measured against those)

This would ensure also that Program and Project Managers and the ePMO has visibility in the demand pipeline on a multiyear horizon planning (through Portfolio and Resource management tailored to specific divisions) and to be able to Resource allocate / plan accordingly



Agility & Digital transformation as it relates to how to running ePMO

(3) Value Management

I would look at the opportunities to have the cost of the ePMO funded through the Division / Business Lines potentially as a "ePMO-as-a-Service".

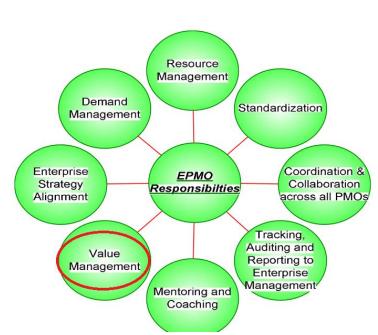
Typically, organizations are dealing with the costs of the PMO by absorbing them into the running of a head office function (cost of doing business = PMO leader's budget is part of the overall central budget, and you must justify what you do with the money and be involved in budget negotiations...there is no cross-charging out to other departments. Any funding you need for the PMO is provided centrally.

Move away from the PMO being a pure cost center and want to be able to split the cost of running the group into a "project charge" aka the "cost of services provided" and apportion that cost between Divisions / Business Units.

High Level things that need to be worked out (metrics) in order to apportion the cost in a fair matter:

- 1. Number of projects each division is requiring
- 2. Resources Allocation used on the projects for each division
- 3. Financial value of the project (Business Value / Benefits from the Business Case).

We look at the PMO portfolio and establish what proportion of the cost of running the PMO should be allocated to each Division, based on their usage of services. For ad-hoc requests from other departments, we could use the same mechanism for cross-charging staff and services.



Agility & Digital transformation as it relates to how to running ePMO

(4) Mentoring and Coaching (cont'd)

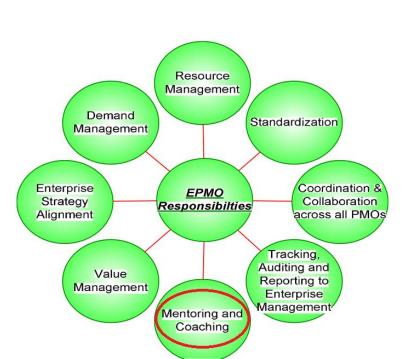
Implement 365 reviews

Performance plans as needed

Remediation plans as needed

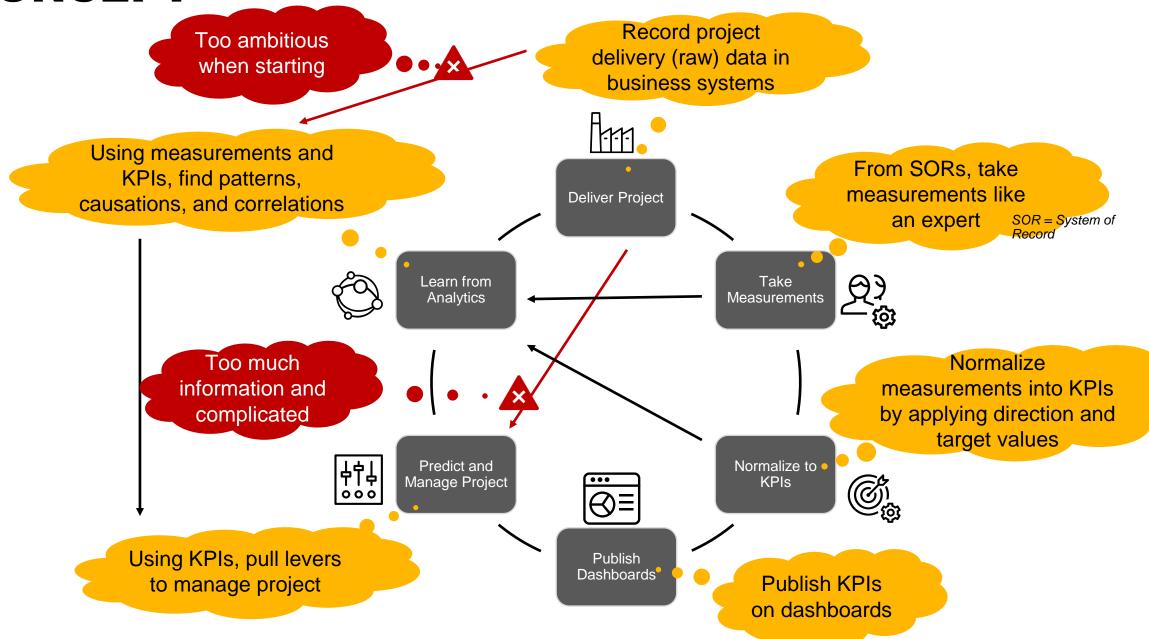
Push for and support my team members in the 3 following facets:

- **Autonomy** → People want to direct their own lives (self direction).
- **Mastery** → People want to have a "Challenge".
- **Purpose** → People want to "Make a Contribution". Organization needs to have a transcendence purpose / objective.



MY ANALYTICS & MY DASHBOARDS

CONCEPT



smartsheet





EXTERNAL PROJECT PORTAL

Overview



Milestone	% Complete	Status	Start Date	End Date	Apr	May May	Jun	Jul	G3 Aug	Sep	Oct	Q4 Nov	Dec	Jan	Q1 Feb	Mar	Apr	Mar
OFR-181-BelkinVelopTB	29%	In Progress	3 May	11 January										Ore	101.0	Arrivo	e78	
PROJECT START	100%	Complete																
OpenSync Bring Up	100%	Complete																
Core Features (INTEGRATION)	100%	Complete																
3P Apps (INTEGRATION)	31%	In Progress							30	Appe (A	NTDGA	ATIONS						
Platform enablement (NTEGRATION)	76%	In Progress							tecture.	enables	nert (fr	TEGA	KTION					
Stabilization	51%	In Progress							-	at Azarla	pr.							
Release Candidate	3%	In Progress								Pi Pi	ariseppas	Camdida	ate					
Certification	0%	Not Started										Cest	oatlon					
GA Acceptance	0%	Not Started												GA.Aco	epteno			
Project Closure	0%	Not Started												Ehro	et Cha	in.		
PROJECT END	0%	Not Started												4490	UECT I	DAD:		

Blocker List

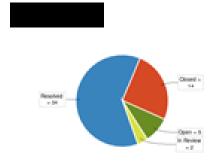


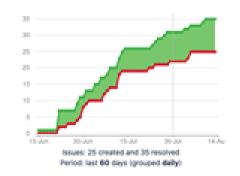
Bug List





Completion Overview





Summary Program Status Overview

Status / Schedule Key =

GOOD = Program is on track to meet scope and milestones per scheduled dates.

= Trending towards delayed, this is a call to action to use an opportunity for the executive team to provide input and additional mitigation solutions to move program back to good status and avoid delays.

= Program is currently behind schedule to meet scope and milestones. New dates must be signed off on to move back to green and track to new dates moving forward.

BLOCKED = Program is blocked from moving forward. Need to fully engage executive team to help resolve blocking issues in order to move program forward.

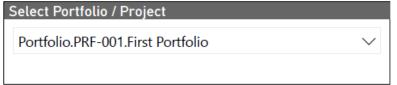
LAUNCHED = Program has successfully launched to the desired feature set and dates.

BEING SCOPED = Working on PRD / TRD / Budget / Schedule

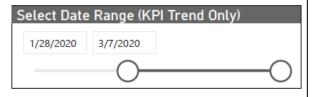
latform	Product	Project Number & Description	Lifecycle Stage	Status	Target Launch Dates	Product Manager	Project Manage
			Development	GOOD			
			Development	AT RISK			
			GA	LAUNCHED			
			Complete	LAUNCHED			
			GA	LAUNCHED			
			GA	LAUNCHED			
			Development	000D			
			Development	0000			
1			Development	AT RISK			
			Development	GOOD			
			POC	BEING SCOPED			

Created by Ryan Okamuro, last modified on Jun 25, 2021 Product Lead: Technical Lead: Program Manag Project Manager GTM: Bethany Status 0000 PRD (Locked) TRD (Pending) Project Summary: Last Weekly Meeting Notes Smartsheet Key Highlights (Previous Week) Key Highlights (Upcoming Week) Program Milestone Date Lead Status Notes Tracking Waiting for Dev-Ops sign-Off TRD Sign-Off Mobile System QA Start Web System QA Start Cloud System QA Start Alpha Entry CXT Testing Start Beta Entry GA Link: SmartSheet Schedule Risk Management Risks Risk Mitigation Functional Trigger Date Plume Priorities Project Number Description Lead Date Status Notes

Capital Projects Analytics Current Status and Performance Exceptions

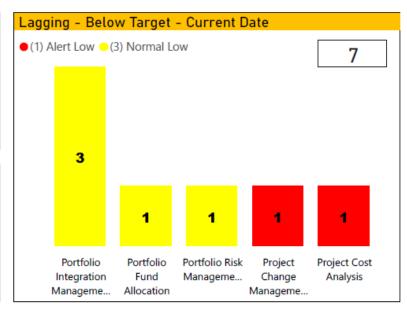


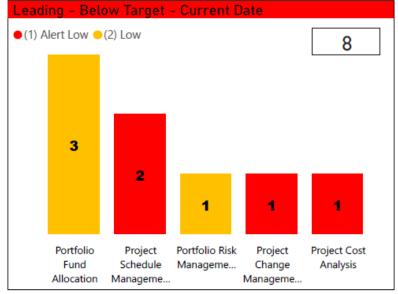


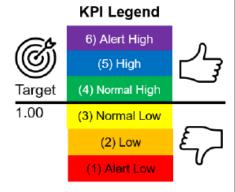




Stats and S	Selection	าร		Current
KPI Impact ▼	Lagging	Leading	Total	Below Target
(3) High	1	7	8	rarget
(2) Medium	9	10	19	1
(1) Low	3	1	4	
Total	13	18	31	15



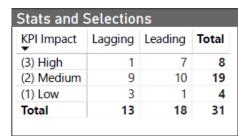




Below Target Indicators - Lagging and	Leading -	Curren	t Date								
KPI Type Name	Measure ment	UOM	KPI Value	Section Name	Alert Low	Low Value	Target	High Value	Alert High	KPI Category	KPI Impact ^
KPI-FFA-01A.Percent of funds allocated to original budget	14.00	percent	0.18	(2) Low	0.00	50.00	80.00	85.00	90.00	Leading	(2) Medium
KPI-FFA-01D.Percent of funds allocated to underruns	2.00	percent	0.40	(2) Low	0.00	3.00	5.00	8.00	10.00	Leading	(1) Low
KPI-FFA-01E.Percent of funds in reserve	2.00	percent	0.40	(2) Low	0.00	3.00	5.00	8.00	10.00	Leading	(2) Medium
KPI-FFA-02A.Percent of funds spent	18.00	percent	0.18	(3) Normal Low	0.00	0.00	98.00	99.00	100.00	Lagging	(2) Medium
KPI-FRM-06A.Percent of negative impact mitigated	31.00	percent	0.39	(2) Low	30.00	50.00	80.00	85.00	90.00	Leading	(3) High
<											>

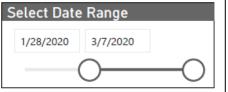
Capital Projects Analytics

Portfolio Health Indicators by Business Capability





Current Date 07-Mar-20



Portfolio Management

Portfolio Integration Manage...

U. / 6!

Goal: 1.00 (-23.6%)

Count of KPIs Current Below Target

5 3

Portfolio Fund Allocation

1.17~

Goal: 1.00 (+16.5%)

Count of KPIs Current Below Target

6 4

Portfolio Risk Management

1.22~

Goal: 1.00 (+21.64%)

Count of KPIs Current Below Target

14
2

Summary of Project Management

Project Change Management

0.61

Goal: 1.00 (-39.5%)

Count of KPIs Current Below Target

2 2

Project Schedule Management

0.61

Goal: 1.00 (-39.5%)

Count of KPIs Current Below Target
2 2

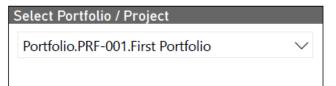
Project Cost Analysis

0.61

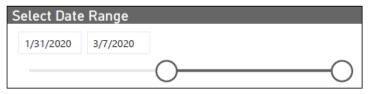
Goal: 1.00 (-39.5%)

Count of KPIs Current Below Target
2 2

Capital Projects Analytics Capability Details









Lagging - A	bove	Target		Leading - A	bove	Target
KPI Impact	KPIs			KPI Impact	KPIs	
(3) High	5			(3) High	3	
(2) Medium	20			(2) Medium	18	
Total	25			Total	21	
			\			

	2	2			2	3	
10	4		 6	 4			
		9			6	9	
5	5		 7	9			
	1	2			6	1	

Stats and S	tats and Selections								
KPI Impact	Lagging	Leading	Total	Below					
(3) High	1	2	3	Target					
(2) Medium	6	5	11						
Total	7	7	14						
				2					
				1					

Lagging - B	elow	Targ
KPI Impact	KPIs	
(3) High	1	
(2) Medium	16	
Total	17	

KPI Impact ▼	KPIs	
(3) High	9	
(2) Medium	12	
Total	21	

	Portfolio Fund Allocation
	Portfolio Integration Management
~	Portfolio Risk Management
	Project Change Management
	Project Cost Analysis
	Project Schedule Management

Select Capability

Select Target Dir	ection
High	Low

Indicator	Details											
Date	KPI Type Name	Measure ment	UOM	KPI Value	Section Name	Alert Low	Low Value	Target	High Value	Alert High	KPI Category	KPI Impac
01-Feb-20	KPI-FRM-06A.Percent of negative impact mitigated	23.00	percent	0.29	(1) Alert Low	30.00	50.00	80.00	85.00	90.00	Leading	(3) High
29-Feb-20	KPI-FRM-04A.Number of negative impact items expected to trigger soon	7.00	each	0.29	(2) Low	0.00	1.00	2.00	5.00	10.00	Leading	(2) Mediur
29-Feb-20	KPI-FRM-04B.Number of positive impact items expected to trigger soon	7.00	each	0.29	(2) Low	0.00	1.00	2.00	5.00	10.00	Leading	(2) Mediur
29-Feb-20	KPI-FRM-05A.Number of negative impact items past expiration data	7.00	each	0.29	(2) Low	0.00	1.00	2.00	5.00	10.00	Lagging	(2) Mediur
29-Feb-20	KPI-FRM-05B.Number of positive impact	7.00	each	0.29	(2) Low	0.00	1.00	2.00	5.00	10.00	Lagging	(2) Mediury
<												>