

Re-Launching Your PMO During a Merger

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“You do not want to be considered just the best of the best. You want to be considered the only ones who do what you do”.

– Gerry Garcia

The Big “M” is a lot more fun than the big “D”

- Pay Attention- Context Matters
- What Type of Merger is this going to be?
- Can be an Opportunity Factory
- Don't Forget the People- Technology is a People Business
- Be Flexible...the rules have changed

Unique Merger Challenges

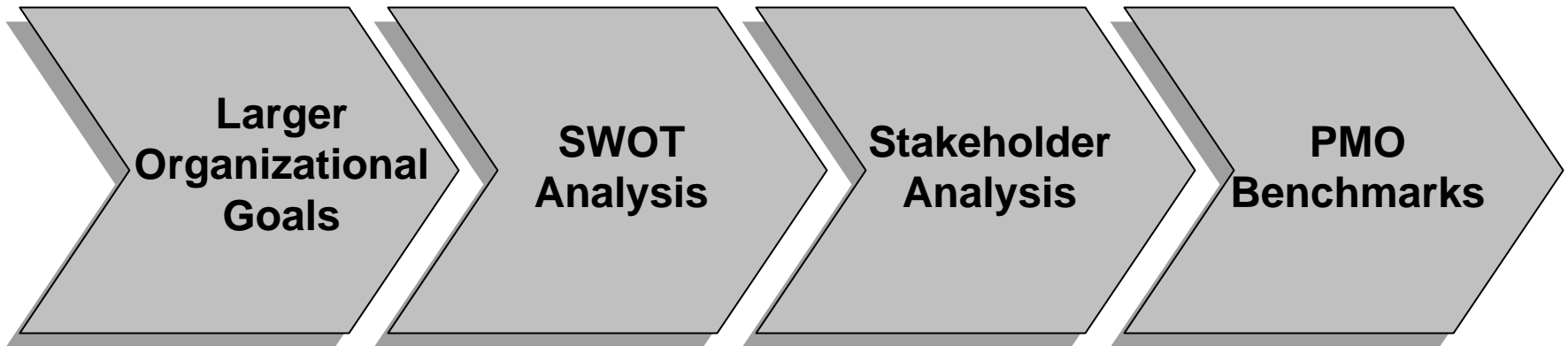
- Organizational changes
- Projects Are Everywhere
- Information Aggregation
- Vocabulary
- Takes time to consolidate methodology
- Governance framework
- Business as Usual does not stop
- Everyone is communicating...lots of noise

Unique Merger Opportunities

- Can Leverage Merger as a Change Catalyst
- Leverage the Best of Both Organizations ((1 + 1) > 2)
- Projects and Project Management are in the spotlight
- Instant Geographic Dispersion- Increase in Coverage
- Lessons Learned Generator

Situational Analysis

**Situational Analysis:
Where are you now?**



Larger Organizational Goals

- Near Term and Longer Term Goals
- What is the Corporate Strategy?
- What are your Corporate Values?
- Where are the Growth Areas?

Situational Analysis- SWOT

STRENGTHS (Internal)	WEAKNESSES (Internal)
<p><i>Build on our Strengths</i></p> <ul style="list-style-type: none">• What are your advantages?• What do you do well?• What do other people see as your strengths?	<p><i>Resolve our Weaknesses</i></p> <ul style="list-style-type: none">• What could you improve?• What do you do badly?• What should you avoid?
OPPORTUNITIES (External)	THREATS (External)
<p><i>Exploit Opportunities</i></p> <ul style="list-style-type: none">• Where are the good opportunities facing you?• What are the interesting trends you are aware of?	<p><i>Avoid Threats</i></p> <ul style="list-style-type: none">• What obstacles do you face?• What is your competition doing?

Example- SWOT Analysis

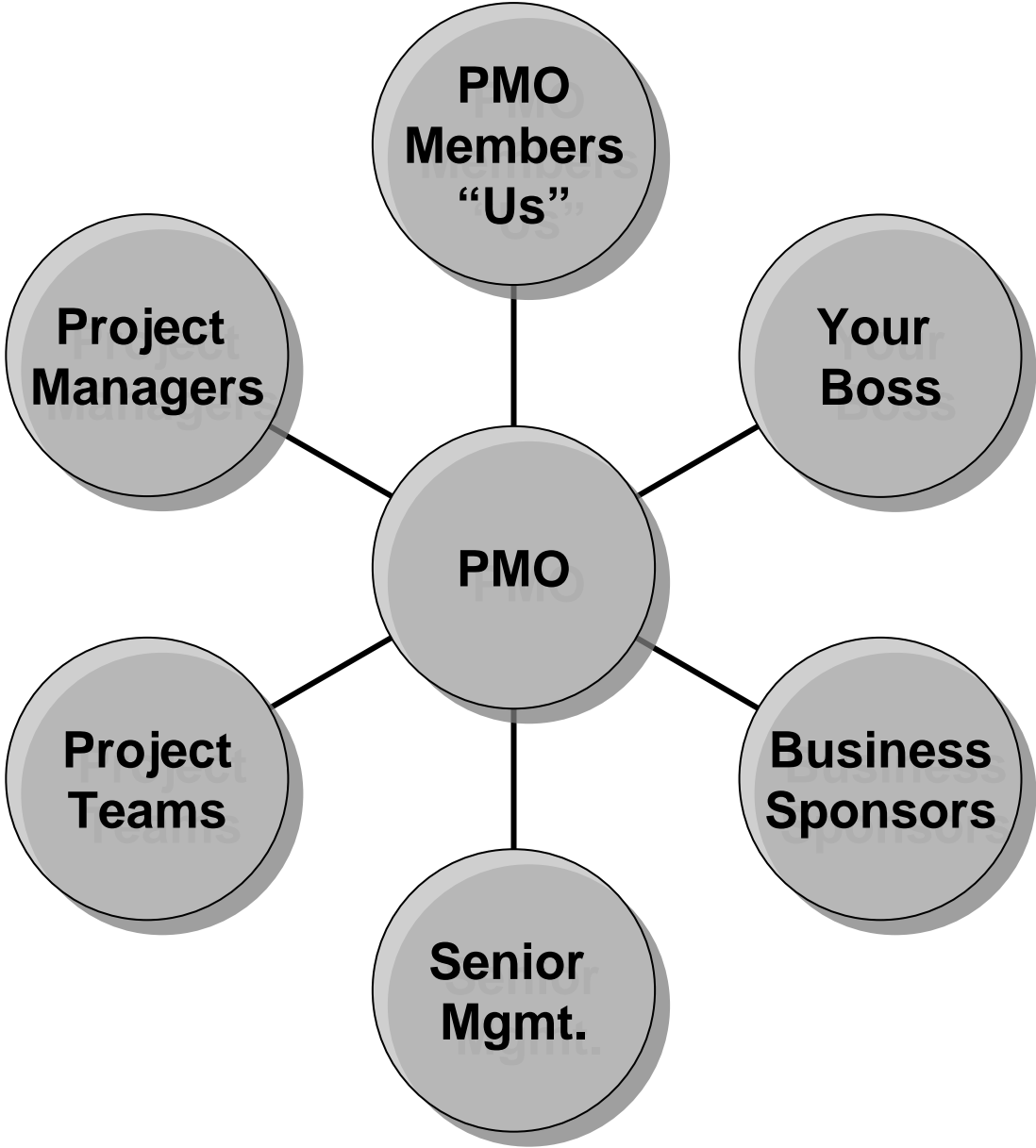
Strengths

- **Documentation from both legacy groups**
- **Leverage intellectual capital & expertise**
- **Flexibility (spirit vs. letter of the law)**
- **Sustain relationships with other groups (Compliance, Risk, etc.)**
- **Access to tools**

Threats

- **Rogue Processes**
- **Pushback to Best Practice**
- **Why do we need a PMO?**
Responding to the question of value brought to the table by PMO
- **We are not the police**

Stakeholder Analysis



Example- Stakeholder Analysis

Business Sponsors

- Assist in meeting objectives
- Independence
- Project advocate
- Monitor investment results
- Sounding Board
- Liaison to other functional areas
- Keep Projects out of trouble

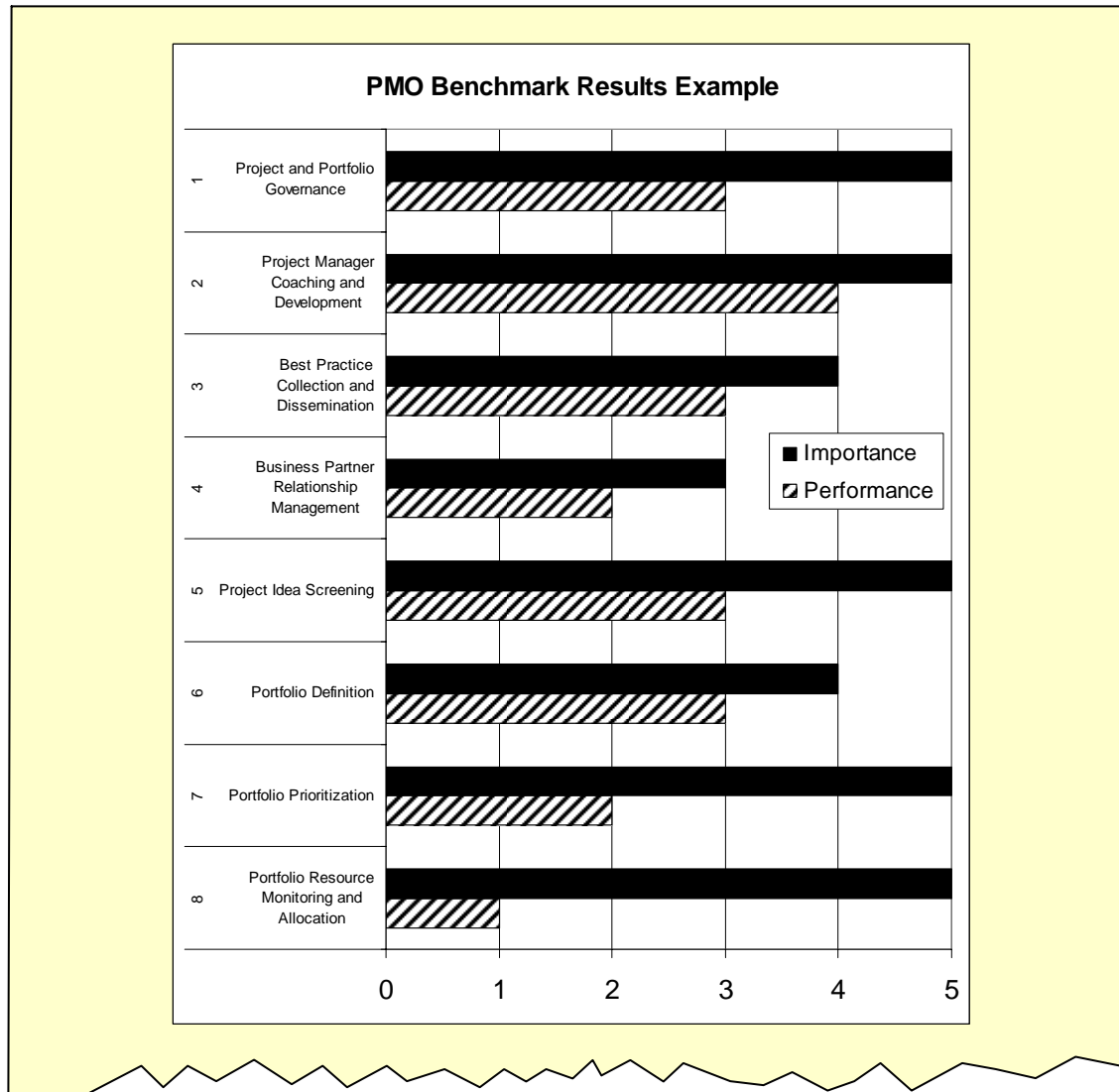
PMO

- Clear Expectations
- Challenging work
- Management Support
- The right tools
- Honesty, Clarity, Transparency, Integrity
- Open Communication
- Fun
- Recognition

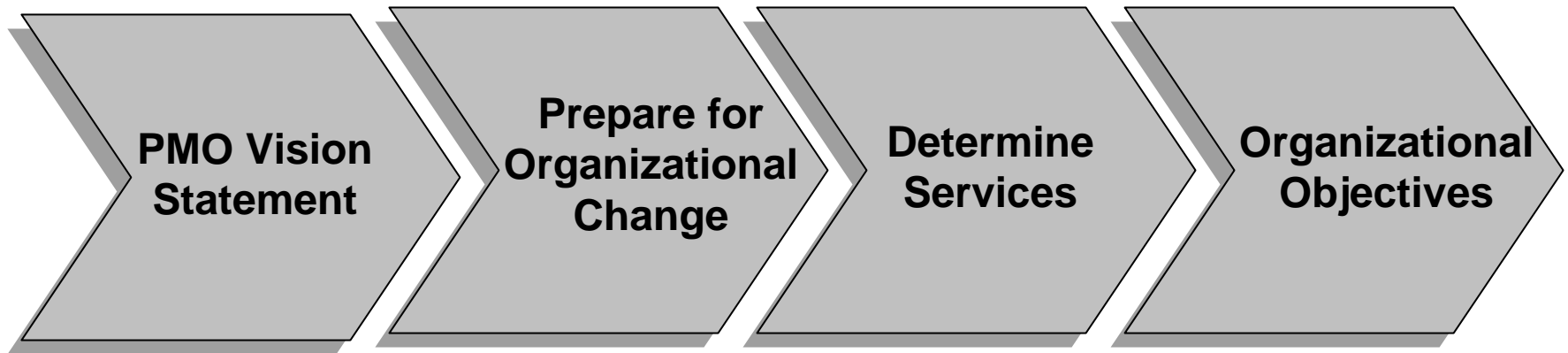
PMO Benchmarks

- Document the reference points from which improvement will be measured
- Develop an understanding of the services provided (and not provided)
- Rank Importance and Performance
- Be Creative
- Use Multiple Scales
- Keep it Simple

Example- Benchmark Results



Charting the Migration- Where Are You Going?



PMO Vision

- Create Unity of Purpose
- State vision in terms of “direction of travel”
- Declaration of the organization’s reason for being
- Create the future by taking action on the present
- Inspiration- mean it, believe it, live it
- Put it writing
- Talk about it
- Take advantage of every opportunity to convey the overall aim
- Keep the overall aim clear, visible, in front of people at all times

Prepare for Organizational Change

- What to Expect
- Create a Team Based, Collaborative, Empowering, Enabling, organizational Culture
- Recognize that there will be Culture Changes
- Plan to use failures for learning and support reasonable risk
- Create an atmosphere of fun, success, and unique mission (being part of something special).
- If you want to win, you have to have fun.

Determine Services




- Project and Portfolio Governance
- Project Manager Coaching and Development
- Best Practice Collection and Dissemination
- Business Partner Relationship Management
- Project Idea Screening
- Portfolio Definition
- Portfolio Prioritization
- Portfolio Resource Monitoring and Allocation
- Business Case Development
- Requirements Definition
- Resource Coordination
- Project Planning
- Metrics Tracking and Reporting
- Stage-Gating and Ongoing Reviews
- Risk Management and Mitigation
- Vendor and Outsourcing Management
- Project Postmortems/ Audits
- Business User Readiness Assessment
- Business User Adoption Support
- Business Case Realization Tracking

Source: Key Attributes of a World-Class PMO, CIO Executive Council

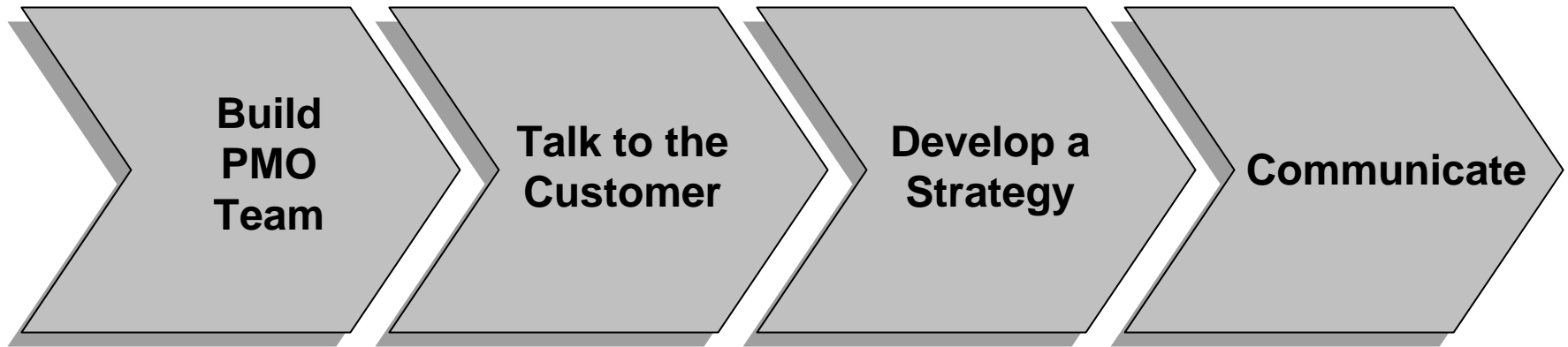
Organizational Objectives

- This is what the End-State PM Culture will be...focus on Science (PM), Art (Leadership)
- This is what the End-State Organization will look like
- This is what the End-State Process will look like
- This is what Enabling Technologies will look like
- PM Professional Responsibility

Example- Objective Framework

	 People	 Process	 Tools/ Templates
Objective 1			
Objective 2			
Objective 3			
Objective 4			

Have a Plan- How Are You Going to Get There?



Build the PMO Team

- What kind of PMO are you?
- Build a Performance-Based Culture
- Make your organization fast and flat
- Entrepreneurial spirit
- Czar Strategy
- Harnessing and managing skills and experience
- Measure what matters

Talk to the Customer

- Listen!
- Ask Questions
- Features and Benefits

Develop a Strategy

- *“Building a PMO is like running a campaign (Marketing, Political, Military)”- Jack Duggal*
- Make your strategy clear and narrowly focused
- This is project!
- Balance Short-Term and Long-Term Goals
- Keep it Simple
- Don't Try to Do Everything at Once
- Articulate your Value Proposition
- Define Success Metrics

Example- Near Term Goals

Goal: Integrate the best of both companies Major Project Governance Processes

Features:

- Hybrid Governance Process
- Definition of Monthly Governance Cycle
- Definition of Governance Reporting

Benefits:

- Leveraging the best of both companies
- Introduces scalability
- Initiates Governance process earlier in the Lifecycle

Goal: Integrate Project Management processes with adjacent processes and tools

Features:

- Fully Define a consistent, scalable PM Methodology
- Develop a PM tool/ process integration strategy.

Benefits:

- Creation of a consistent PM methodology that seamlessly integrates with adjacent processes
- Boosts effectiveness by integrating processes.

Communicate

- Have a Communications Strategy
- Listen!
- Build Communities
- Collaborate
- Map PMO Objectives to Corporate Strategy
- This is what the Migration will look like
- The Harmonization Value Chain
- This is what it Means for IT Staff

Summary

- Clarity of Purpose
- Ensure Buy-in
- Avoid Politics, Red Tape, Hidden Agendas and Power Struggles
- Realistic Expectations
- Keep the Entrepreneurial Spirit. The PMO is your Business
- Have Fun!

“A rear view mirror is a great thing to have, but there’s a reason it’s small and windshield is big. It’s useful to see what’s going on behind you, but it’s a lot more important to see what’s in your future”.

– Bob Kelly