Setting and operationalising an Enterprise PMO (EPMO)

<u>Broad level engagement roadmap</u>

Following steps broadly outline what needs to be done to set up and operationalise an EPMO,
to support an organizational Project Portfolio Management (PPM). Many of these steps could be
undertaken parallelly and some of them could require iterative performance.

Steps	Description of major work to be done / deliverables
1	Understand the Client organizational strategy, vision/mission and value systems
2	Understand the industry background, existing management structure/processes , pain areas, expectations from Client top and middle management (Clients could be internal or external)
3	Study and understand the existing initiatives, existing PMO setup (if any), from people/process/tool perspectives. Assess the existing initiatives with reference to their contribution to organizational objectives. Understand the major stakeholders concerning the engagement and develop their interest/influence profiles
4	Understand / assess the existing organizational maturity for PPM – in terms of support for planning and monitoring, governance, risk and benefits management, resource management and PM related financial management (if applicable)
5	Define Client Champions for EPMO planning, implementation and sustainment. Define the engagement vision, overall roadmap and stakeholder engagement/ communication management plans
6	Develop the target operating model for the EPMO along with the Client Champions. This model can cover redefined EPMO organisational structure (i.e. centralized/ decentralized etc) , processes for engagement with portfolio, programs and projects, EPMO tool support needed and required information flows (including redesign of management dashboards/ advance alert systems etc) to be deployed.
7	Define a roadmap for EPMO implementation, including resourcing, training plans, skill-set enhancements and putting processes in place
8	Develop a Center of Excellence structure outline – to institute sustainment of PPM standards, maintenance of knowledge-bases, establishment of metrics and assurance arrangements, creation of flexible resource base for supporting ongoing projects and programs etc.
9	Select a Project Portfolio Management Information Systems (PMIS) tool to support the evolving EPMO. The features of the tool need to align with the PPM maturity of the organization and the functionalities in EPMO which need to be supported
10	Determine how the EPMOs need to be funded – centrally – or a part of fund coming in from change initiative budgets
11	Determine best practices, metrics, knowledge management tools to support maturity enhancement of the organization through the COE
12	Determine robust change initiative selection, progress performance measurement, governance and assurance and benefits management procedures

13	Develop the Business Case for the suggested EPMO structure – highlighting the benefits envisaged and the likely costs incurred (along with the Client Champions)
14	Present the findings and get Client management approval for deployment.
15	Assist the portfolio manager in launching of right programs and projects, by aiding in their business case development, prioritization, and gaining approval from respective governance boards
16	Enable smoother start and execution of programs and projects by conducting kick-off meetings, initial risk assessment meetings etc. Also assist the programs and projects in functions like requirements management, dependency management across initiatives, scope fulfillment and schedule tracking, vendor management, ongoing risk and issue management, configuration and information management, capacity planning, resource management, skill enhancement, communications management and transition management. EPMOs could also undertake independent assurance and reviews to assess the project and program performance. The EPMOs can also be vested with the responsibility of budget tracking and assessment of benefits in some organizations.
17	Facilitate in setting up temporary program and project offices – to enable customization of processes, tools and systems specific to the engagement
18	Deploy PPM skilled resources to projects and programs from the flexible resource base
19	Ensure orderly closure of projects and programs, assimilating the lessons learnt and updating the best practices / metrics
20	Facilitate feedback to the strategy on the success of the change initiative management and enable continuous improvement on the PPM maturity of the organization

The above roadmap can be customized based on Client requirements and their budgets etc.