# Program Management Governance Methodology

June 20xx

# Content

**Overview of Principles and Approach**

Integrating Quality Management into Governance

Work Streams and Outcomes

Related Experience



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# Executive Summary

We are pleased to present this document to you. The scope of the program you are preparing to undertake is complex with a high degree of dependencies. Managing this, in many ways, will determine how you measure your success. Measuring your success depends on what you define as your objectives. In other words, ultimately the goal is to deliver your program on time and with the highest level of quality possible so that your organization received the greatest benefit. So this is the vision, but the strategy and objectives for achieving this will, in large part, determine if you realize that vision.

Programs, and we call it a program because it will consist of many inter-linked projects, of this size and scope effectively require all of the same functions of a normal operation. It is almost a working entity or company in and of itself. So, in approaching the organization of this program and the operating model, you must think in these terms. Taking a top down approach, ensuring that the program governance, quality management system, and management structure is in place from the beginning will be the key to setting the right path from the start.

We have structured our document to illustrate for you that we have an overarching high-level vision, but that we link this very tightly to the program management office and ultimately the execution of the various elements of the program. We have highlighted that our approach takes three main parallel work streams, Education, Knowledge Transfer, and Execution. Put simply, we will train your staff on this model while we are shadowing their work to ensure it is being done properly, and finally we will participate in the governance of the execution.

Our operational expertise and our vast experience in program management coupled with our work in the Middle East uniquely positions us to assist you in ensuring your program is a success.



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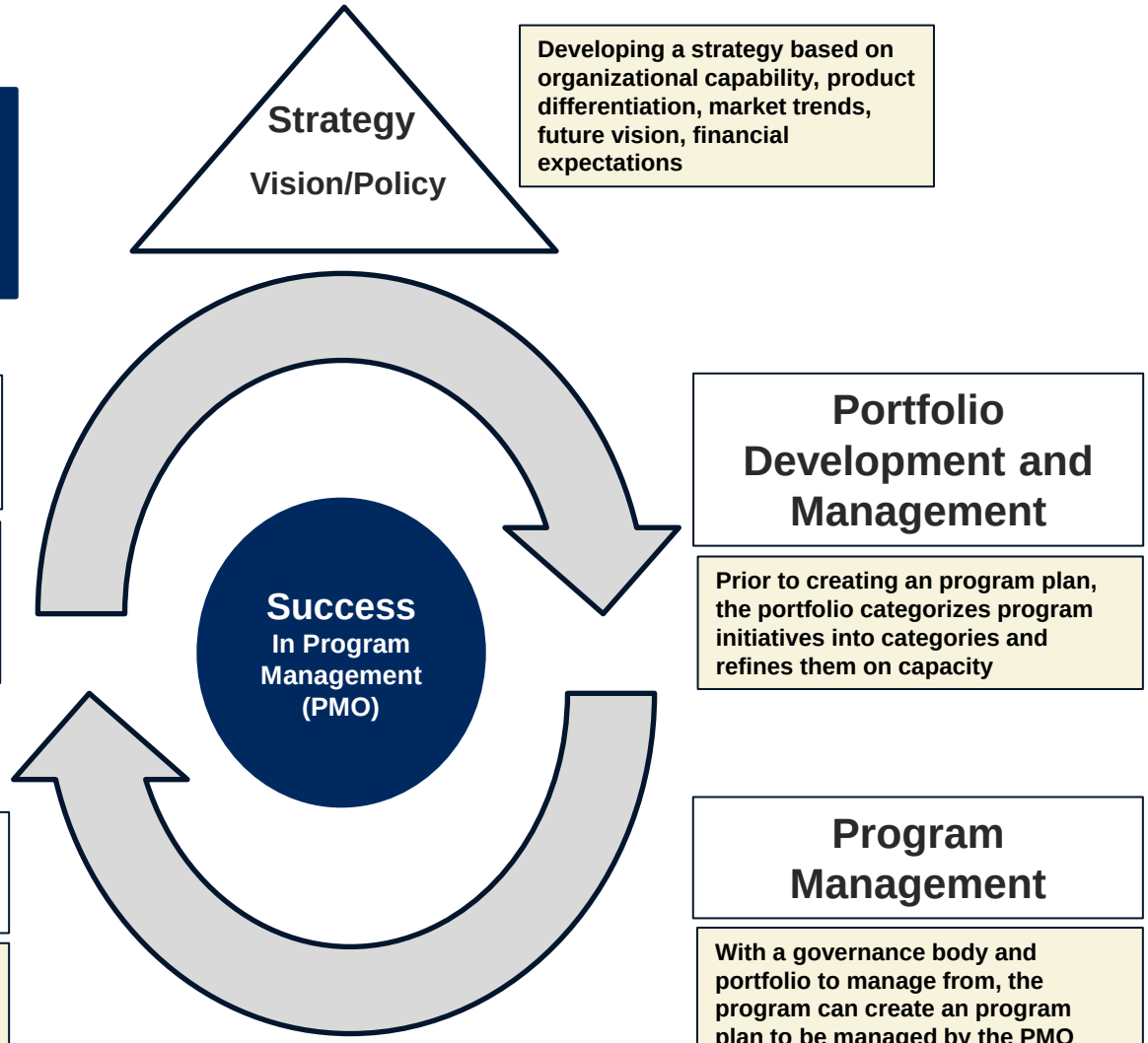
# Main Pillars of Our Approach

***In each area of the lifecycle we will work with your staff to ensure that this model can be applied to all of your future programs.***




**Developing a strategy based on organizational capability, product differentiation, market trends, future vision, financial expectations**

## Portfolio Development and Management

**Prior to creating an program plan, the portfolio categorizes program initiatives into categories and refines them on capacity**

## Program Management

**With a governance body and portfolio to manage from, the program can create an program plan to be managed by the PMO**

## Operational Execution/QMS

**The ultimate definition of strategic success comes in the ability of the operation to execute the strategy. Linking operational performance to strategy is a critical success factor.**

## Monitoring and Evaluation/Continuous Improvement

**"What gets measured gets done." Using KPIs, both leading and lagging, in all strategic areas the model can be adjusted according to changing needs in the organization**



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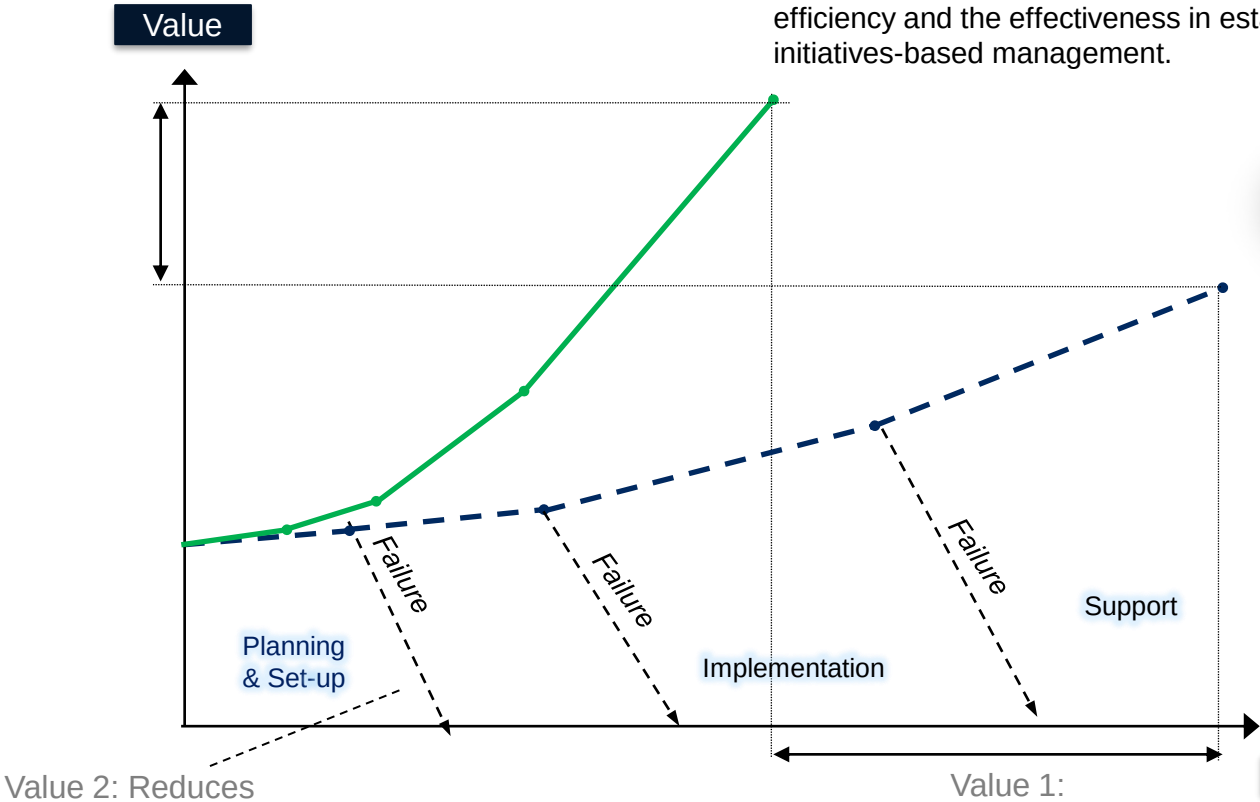
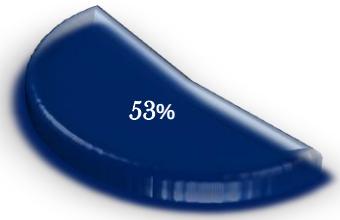
# Value of an Effective and Efficient PMO

Balancing these key factors is what drives both the efficiency and the effectiveness in establishing initiatives-based management.




UNDER PERFORM

1. PM Practices
2. Organization
3. Planning

**Processes Guidance** → **Process Control** → **Resource Control** → **Project Control**



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# What is the Scope of a PMO?

**What is a PMO Framework?**

The PMO Framework provides a structured approach to the effective set-up of the Program Management Office and delivery of PMO activities

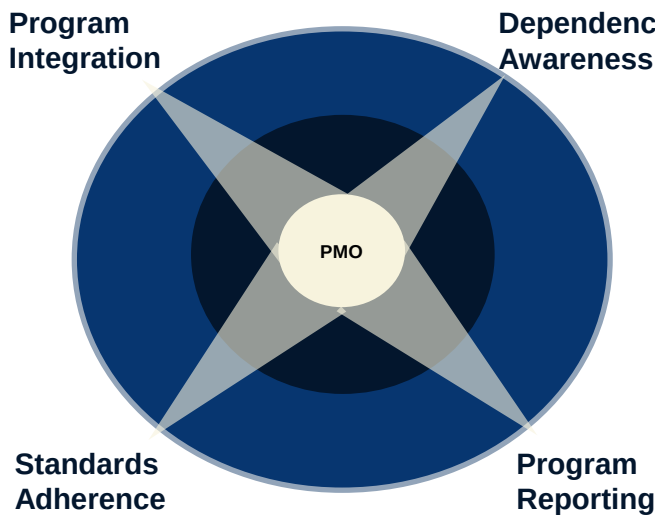
**What is the Objective of the PMO Framework**

The objective of the PMO Framework is to support the effective establishment and efficient operation of PMO processes to assist Project leadership in delivering against strategic goals.

## Primary Activities

- Program Governance and Planning
- Communication Management
- Quality Management
- Risk Management
- Issue Management
- Resource Management
- Scope Management

## PMO Framework




## Secondary Activities

- Vendor/Contract Management
- Benefit Management
- People Change Management



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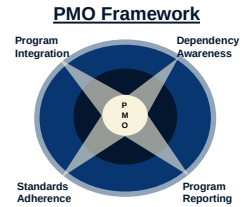
# Scope of a PMO Defined Further




## The PMO Scope can be Summarized as Follows:

- The PMO **monitors** progress of various work streams, and works with stream leads and the Project Manager to ensure timelines, actions, risks and dependencies **are managed in dynamic fashion**;
- The PMO **consolidates** and reports it's findings to the steering committee and vertically across work streams.

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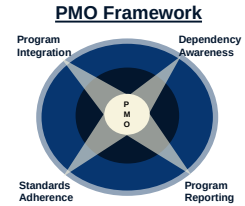
# Organization Plan




## Organization Plan

### 1. Organization Chart

### 2. Project Roles & Responsibilities

| Task | Responsibility | Name of Consultant |
|---|---|---|
| Project Management | 1.1 Client Service Director | Rami Qushair |
| Project Management | 1.2 Senior Advisory & QA | Hasib Jaber |
| Project Management | 1.3 Project Manager | Sanabel El-Rayes |
| Project Management | 1.4 Technical Project Manager | Jaby Shammout |

### 3. Organization Policies & Procedures

Organizational Governance

### 4. Team Development Plan

- Program Training
- Process Training

### 5. Roll-on Package

- Orientation guide;
- Project brief;
- Project charter;
- Current project plan

### 6. Roll-off Checklist

Activities to be performed once a project member rolls off the project



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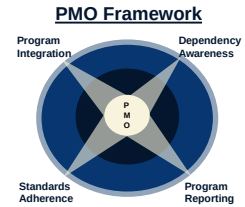
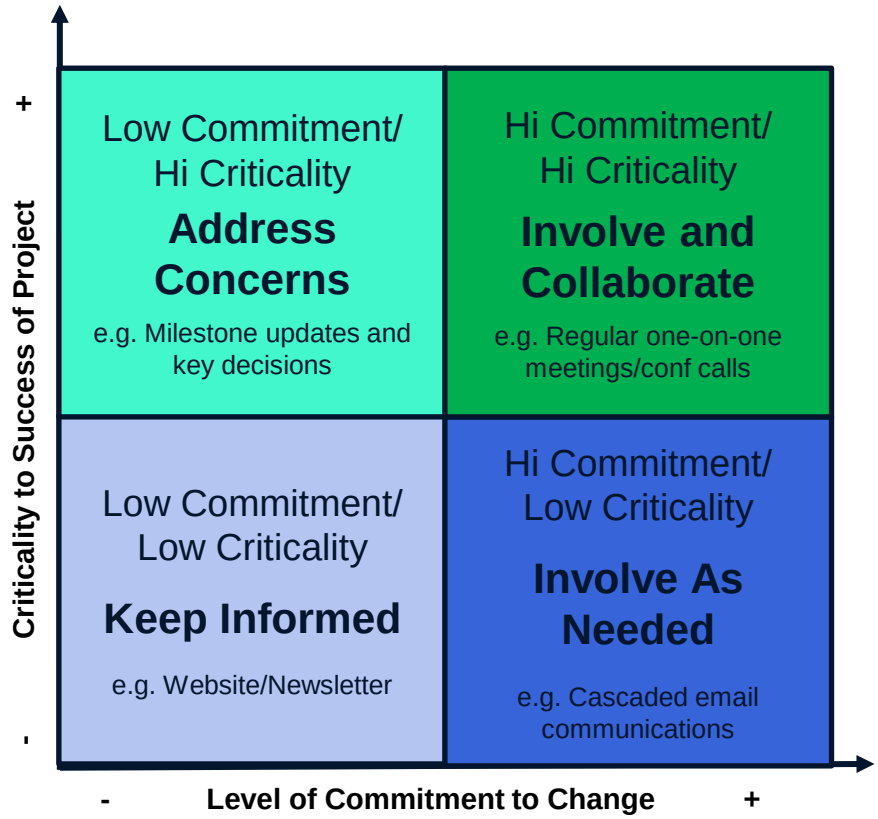
# Communication Plan




**The communication plan identifies stakeholders, and defines activities that manage timely and appropriate generation, collection, distribution, and storage of project information.**

- **Define Stakeholder Profiles**
- **Stakeholder Categories Matrix**
- **Contact List**
- **Project Communication Plan Matrix**
- **Communication Feedback Matrix**
- **Communication Roles**



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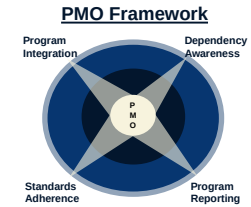
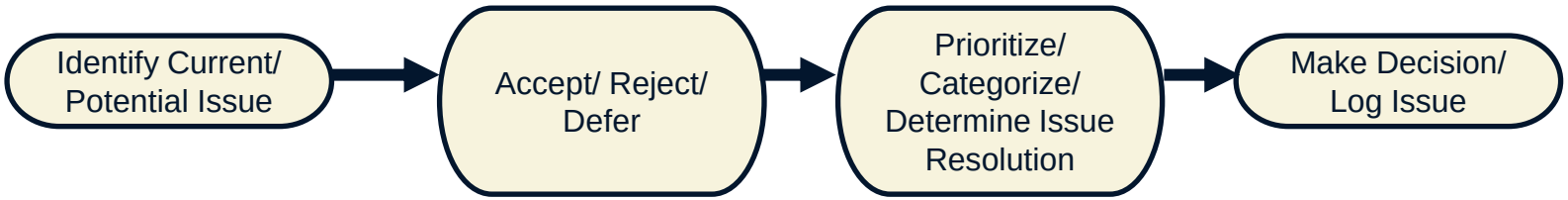
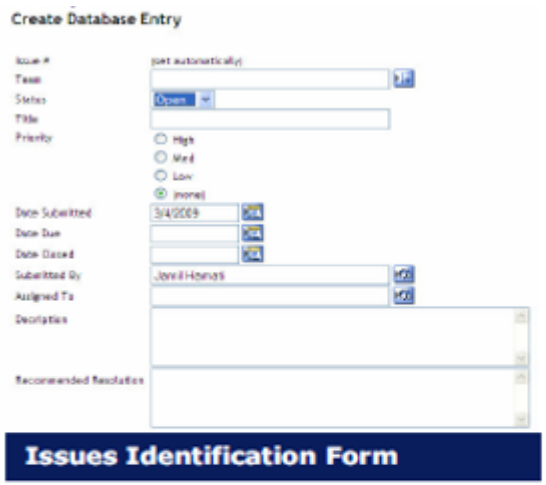
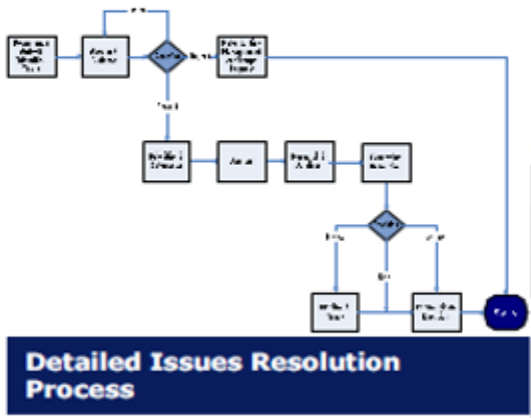
# Issues Plan

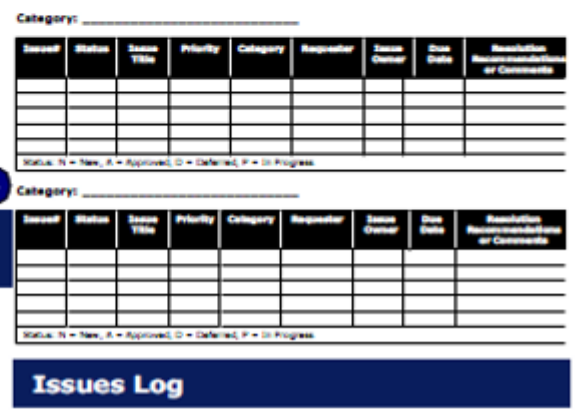



## The Issues Plan describes the cycle through which issues are identified, resolved, and logged:



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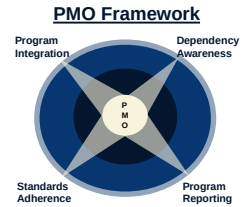
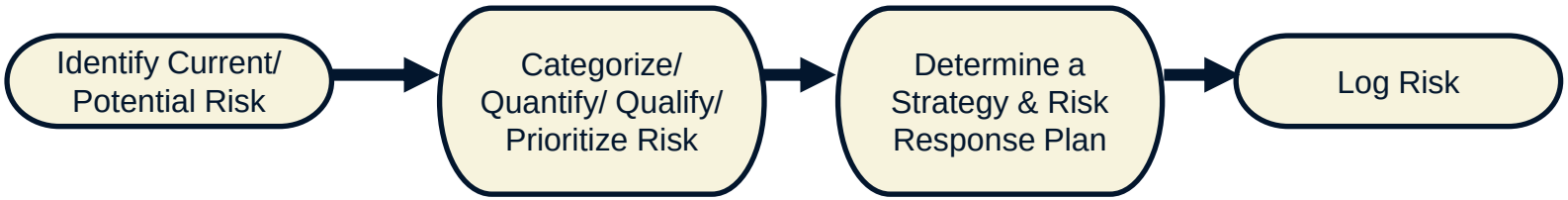
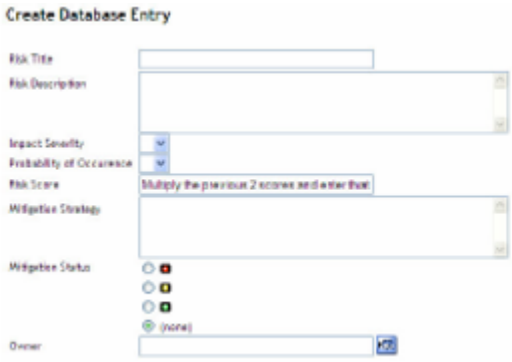
# Risk Plan




## The Risk Plan describes the cycle through which risks are identified, resolved, and logged:




Avoidance, Acceptance, Mitigation, and Transfer




**Risk Identification Form**

| | Risk #1 | Risk #2 |
|---|---|---|
| Impact | 1 | 3 |
| Likelihood | 1 | 2 |
| Consequence (Impact * Likelihood) | 1 | 6 |
| Priority | 5 | 2 |
| Rating | Green | Red |

**Risk Consequence Measurement: Impact X Likelihood.**

**Risk Log**



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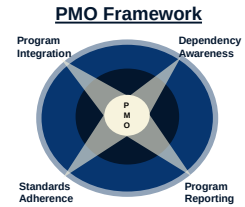
# Program Lifecycle Overview




This document outlines how our group proposes to implement, educate, execute, and create a sustainable plan for the comprehensive management of initiatives.

## 1 Set-Up

- Implement PMO Organization
- Design reporting and monitoring formats and set standards and definitions
- Schedule activities
- Implement PMO support tools
- Define roles and responsibilities

## 2 Design / Re-evaluate and Modify Program

- Identify and initiate dependencies and risks
- Evaluate priorities
- (Re-) allocate resources
- Identify target gaps and initiate counter measures
- Execute projects

## 3 Execute

- Monitor implementation of measure and control effects
- Resolve issues
- Foster decisions
- Report to stakeholder

Sustainable Lifecycle Program Management

## 4 Phase Out/Sustain

- Terminate projects
- Evaluate impact and adapt forecasts of target achievements
- Initiate new projects, if necessary



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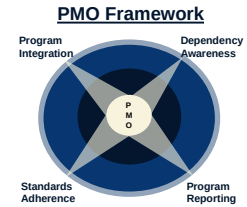
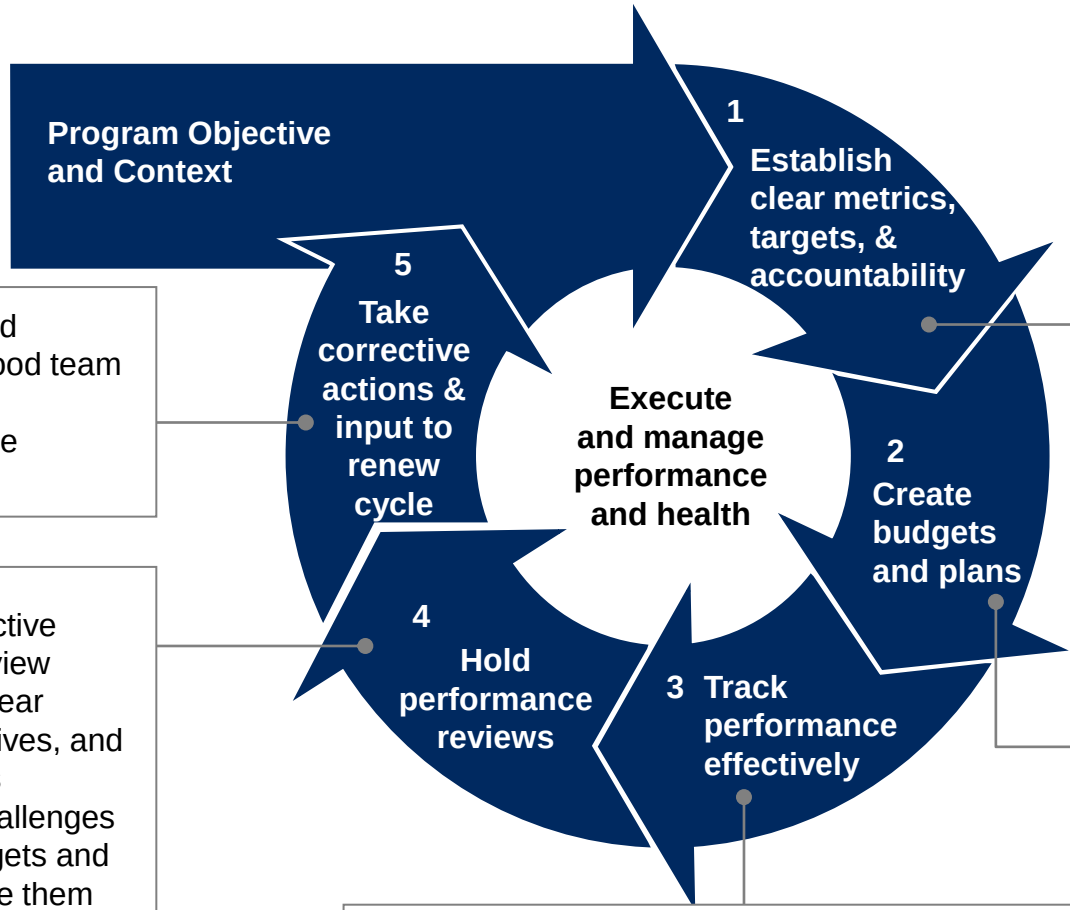
# Program Governance Lifecycle




- Implementation PMO translates Program goals into clear, top-level “key performance indicators” (KPIs) and targets which follow SMART logic
- Cascade of KPIs down through organization

- Use project plans as strategic planning tool
- Develop an implementation plan that will achieve aspired KPI levels

- PMO collects robust, timely, and credible data
- PMO develops the right tools/data management processes to support effective tracking of KPIs

- PMO holds effective performance review meetings with clear agendas, objectives, and outcome reports
- PMO identify challenges to achieving targets and how to overcome them

- Open reward and recognition of good team performance
- Link performance to incentives



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# Content

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**Integrating Quality Management into Governance**

Work Streams and Outcomes

Related Experience



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# Integrating Quality Management into Governance

We believe firmly that the approach to quality is not done in a vacuum. It should be fully integrated, from the beginning, into the overall governance structure for operational management. It affects the lifecycle of projects and operations, and must be integrated into the vision and policy. The commitment to quality must be part of the strategy of any project or organization if it is to be realized. We take a lifecycle approach to quality and we typically start by creating a framework around the following three standards:

| ISO 9001:2008 | ISO 9001:14001 | OHSAS 18001 |
|---|---|---|
| Quality Management within a construction environment | Most construction contracts contain regulatory requirements which must be complied with by both the prime contractor as well as the sub-contractors and suppliers. It is incumbent on the Prime to ensure that there is a well documented policy, compliance program, and monitoring and evaluation for reporting. | As with the ISO environmental standards, most contracts require that standard regulations be complied with as they relate to health and safety. This is especially acute at the actual job site and includes everything from the site setup to instructions for the disposal of materials, operation of equipment, maintenance of equipment, and detailed standard operating procedures. |



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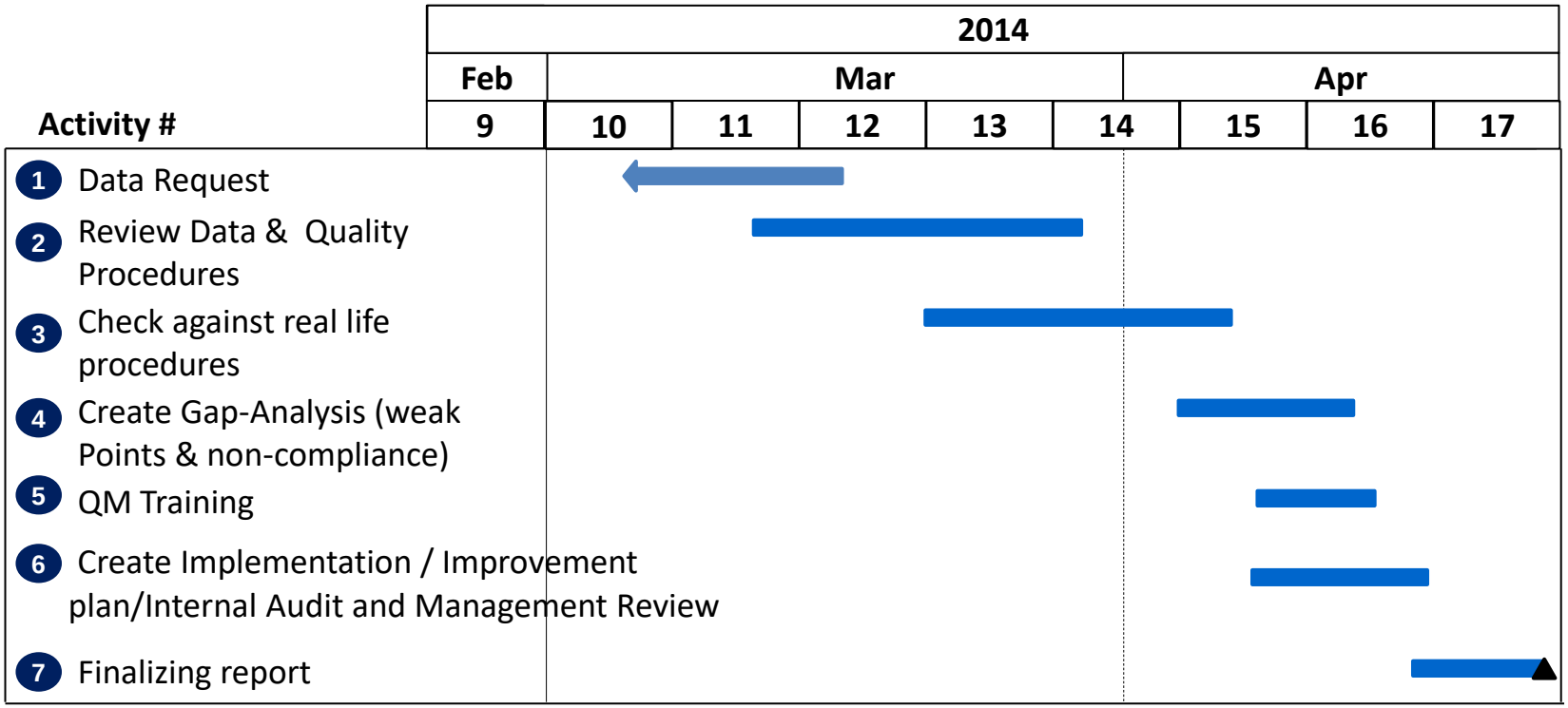
# Assessing the Current State

Example

Again, integrating quality as a program allows it to be structured and managed as part of the overall governance structure. There will typically be two main phases for this. The first phase is assessing the current state of quality, as well as environmental, health, and safety within the organization. The program will look something like the following:

| Work Stream Leader | Contributors | Key Deliverable (△) |
|---|---|---|
| ▪ Quality System Auditor<br>▪ Company Quality Manager<br>▪ JRD | ▪ PMO Lead<br>▪ Quality Management department<br>▪ Other related departments | ▪ Quality Management report |



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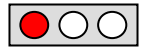
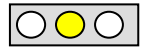
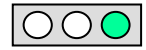
# Managing the Implementation of Quality

Once the assessment and gap analysis is complete, this must be translated into an action plan. The action plan should be tracked in a way that ensures full compliance when it is complete.

 Attention needed  Some issues  On track

## Project status

| Work Streams/ Activities | Status | | |
|---|---|---|---|
| 1E) Quality Management | | | |

## Activities and Milestones achieved this period

- Convert Gap Analysis into Tracking Tool for Implementation
- Provide mach audit reviews of corrective action
- Final audit to ensure compliance
- Monitoring and Evaluation for continuous improvement.

## Issues/Risks outstanding

- xxxxx
- xxxx
- xxxx

## Key decisions to be made

- No key decisions required at this time relative to the work stream.

## Next steps



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# Implementation Tracking

The Gap Analysis for QMS and Environmental, Health and Safety (9001, 14001, 18001), will be converted into a tracking tool that maps directly back to the relevant standard and then is tracked by progress completion rate. In so doing, there will be no gaps at the end of implementation or ambiguity regarding compliance.

Section 5 - Management Requirements

| Clause | Requirement | Comply (Y / N) | Issue or Concern | Action Item(s) (Number each action) | % (0-100) | Completion Status | | | | | | | | | | Due Date | Responsible Person |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | 10 | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 | 100 | | |
| 5.4.2.a | Is there planning of the QMS so as to meet requirements of 4.1, as well as quality objectives? | N | While there is management commitment to ISO certification, quality management systems are pervasive in the organization and require specific planning as well as a continuous improvement model. | 1. Create a comprehensive plan to address all quality gaps. This tool will serve as the baseline for that plan, but the corresponding organization structure to support the implementation must be documented and assignments clear.<br>2. Communicate the plan to employees as part of a quality awareness kick-off meeting. During this meeting management should outline the key aspects of the program and most importantly why the program is important to the success of the company. | 30 | > | > | > | X | X | X | X | X | X | X | 1-Aug | Name(s) |
| 5.4.2.b | Is the integrity of the QMS maintained when changes are planned and implemented? | N | The internal auditing function is in its early stage of implementation and therefore most efforts, to this point, are not inclusive of quality impact. Initial training has been done, but staffing and dedicated staff is required to ensure the ongoing integrity of the quality system. | 1. The internal audit team to review the quality gap analysis as it relates to the documentation of plans internal and external and correct any document deficiencies.<br>2. The quality management department to create procedures for all departments to follow regarding quality guidelines in the implementation of any initiative. | 20 | > | > | X | X | X | X | X | X | X | X | 1-Aug | Name(s) |
| 5.5.2.a | Is therer a member of management that has been appointed, assigned, and authorized to ensure QMS processes are established, implemented and maintained? | Y | The primary issue or concern is that the Quality Manager is not a dedicated full time function and other operational duties consume an inordinate amount of time leaving a question as to whether this individual will have enough time to properly oversee quality assurance. | 1. Quality Manager to create a work plan that clearly depicts his current duties so this can be discussed with management.<br>2. Management to make the appropriate decisions to ensure the Quality Manager has sufficient dedicated time to implement the QMS and to oversee ongoing continuous improvement efforts. | 50 | > | > | > | > | > | X | X | X | X | X | 1-Aug | N/A |



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# Mach System Audits

During the implementation, reviews will be conducted in a fashion similar to what a certifying body would do, but also with a view to integrating the Quality Management system back into the overall governance structure of the company or the project. Below represents the type of feedback, and then on the subsequent page there is a view to how information is monitored or evaluated using Environmental, Health and Safety procedures.

| COMPANY ISO 9001:2008 DOCUMENT REVIEW | Doc: QF-82-02-1 | Revision: A | Pg. 3 of 26 |
|---|---|---|---|

| Refs | Requirements | What to look for and how | Comply | Auditor notes and evidence |
|---|---|---|---|---|
| **Product Realization Process PRP 02 – Purchasing** | | | | |
| 7.4.1 | Control suppliers and the purchased product to ensure that the product conforms to specified purchase requirements. | *How are suppliers controlled: initial selection evaluations, ongoing monitoring, audits of supplier's QMS and/or manufacturing processes, requests for corrective actions?*<br>*How is purchased product controlled: review of quality records (SPC charts, inspection reports, lab test results, etc.), receiving inspection? Who makes these decisions?* | PC | *There is documentation regarding the governance of suppliers, but based on what was reviewed, this needs to be expanded in more detail and integrated into the overall product realization process.* |
| 7.4.1 | Evaluate and select suppliers based on their ability to supply products conforming to specified requirements. Establish evaluation and selection criteria. Maintain records or supplier evaluations and related actions. | *Are suppliers evaluated and reviewed before they are approved? What are the scope, extent and criteria for evaluating and approving suppliers? Who decides? How is the approval documented (an approved vendor list)? Are there records of initial supplier evaluations? Select randomly and review a sample of supplier evaluation and monitoring files. Is their approval status clearly authorized? Is their performance consistently monitored? In the event of nonconforming deliveries, are they required to implement corrective actions? Is there a follow up?* | PC | *Please see comment in 7.4.1* |
| 7.4.2 | In purchasing specifications include, where appropriate<br>▪ requirements for approval of product, procedures, processes and equipment;<br>▪ requirements for approval of personnel, and<br>▪ quality management system requirements. | *Where appropriate, are there requirements for certificates, inspection reports, SPC data, approval of samples, etc. included in purchasing documents? Are there any requirements with regard to supplier's quality management system?*<br>*Review a sample of purchase orders, especially those where the product is expected to come with certificates.* | Y | *This is documented, but it is strongly recommended that process flows be included and that Saad start building up its evidentiary proof of implementation.* |
| 7.4.2 | Ensure adequacy of purchasing specifications before they are forwarded to suppliers. | *How is adequacy of purchasing documents ensured? Are the documents reviewed before release? Are there standard, pre-approved, specifications in the system? What other methods are used?*<br>*See if you can uncover any past problems caused by errors or omissions in purchasing documents.* | Y | *It will be important to further expand the documentation related to engineering evaluation bid specifications and BOQs. This is provided in the documentation, but it needs to be more detailed and include process flows.* |



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# Auditing and Ongoing Compliance

During the implementation we establish a full system of documentation that is managed and maintained. In addition to this, we assist in implementing the compliance policies and procedures for on-site work to ensure that contract requirements are met, regulatory requirements are met, and most importantly ensuring every measure has been taken to ensure the safety, health, and environmental conditions for workers.

## Company

**INTERNAL AUDIT (Environmental) RECORD - Audit No: 0002 (Printed 1/22/2015)** Page 1 of 2

| | |
|---|---|
| **Audit No. Title:** | **0002 18001 OHSAS Internal Document Review -- Saad Company** |
| Ref. Audit Criteria: | OHSAS 18001 |
| Lead Auditor: | SLMM |
| Period Covered (From-To Dates): | |

**Comments:**

Comments: This is an internal review of Saad Company Health and Safety system documentation and procedures in preparation for obtaining certification

**Audit Plan:**

| Process | Location | Auditor | Plan Date | Act. Date | Status |
|---|---|---|---|---|---|
| 18001 Health and Safety Policy | Saad | SLMM | | | OPEN |
| 18001 Planning | Saad | SLMM | | | OPEN |
| 18001 Legal and Other | Saad | SLMM | | | OPEN |
| 18001 Objectives and Programs | Saad | SLMM | | | OPEN |
| 18001 Implementation and | Saad | SLMM | | | OPEN |
| 18001 Competence, Training, | Saad | SLMM | | | OPEN |
| 18001 Communication | Saad | SLMM | | | OPEN |
| 18001 Documentation | Saad | SLMM | | | OPEN |
| 18001 Control of Documents | Saad | SLMM | | | OPEN |



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# Sample – Phased Work Streams and Approach

| | 2 Months – Initiation/Education | 2 Months – Planning/Structure | 6 Months -- Implementation | 24-48 Months – Monitoring/Evaluation |
|---|---|---|---|---|
| | **A**<br>**2 Work Streams:**<br>**A1 – Education/Training**<br>**A2 – PMO Setup and Planning** | **B**<br>**2 Work Streams:**<br>**B1 – Develop an Implementation Plan for Program**<br>**B2 – Establish Shadow Management Structure** | **C**<br>**2 Work Streams:**<br>**C1 – Executive Review Board Management**<br>**C2 – Initial Monitoring and Evaluation Program** | **D**<br>**1 Work Stream:**<br>**Implementation and Monitoring Support** |
| **Key Activities:** | ▪ Conduct PMO and PM training sessions with client identified staff.<br>▪ Conduct Vendor Management and Contract Management with client identified staff.<br>▪ Develop initial structure for PMO with Project Managers or Functional Leads.<br>▪ Create the PMO Charter and Governance Model<br>▪ Stakeholder communication plan and roll-out | ▪ Develop an implementation plan for each of identified initiative, including resources needed, roles and responsibilities, key milestones and all the necessary toolset for implementation. This would include functional dependencies both internal and external, i.e. suppliers, vendors, and other third parties.<br>▪ Establish shadow structure for key functional areas, Procurement, Contract Management, Project Management, Logistical Support | ▪ Initiate KPI review sessions with the executive board.<br>▪ Fully functioning PMO managing day-to-day oversite.<br>▪ Project execution with functional support. In this case the role of PMO, as is stated, is to oversee and support the project managers in the execution of their projects and to facilitate cross-functional coordination. | ▪ Ongoing Monitoring and Evaluation (includes executive review board), PMO, and PM coordination.<br>▪ Introduction to Portfolio Management and how to apply this model to the organization at large and integrate initiatives based management into the day to day operations. |
| **Key End-Products:** | ▪ PMO Introduction Training<br>▪ PMO Implementation Training<br>▪ Vendor Management Training<br>▪ Contract Management Training<br>▪ PMO Charter and Governance Model | ▪ Implementation plan for each of the initiatives with org structure, procedural overview, and reporting guidelines | ▪ Weekly Exec Review KPI Report<br>▪ Weekly Project Review Report | ▪ PMO progress reports are submitted regularly to the project's executive committee<br>▪ A set of KPIs to measure the performance of different units<br>▪ Adjusted plan and business model for integrating the model into the organization and to ensure efficiency and sustainability of performance |

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# A Initiation and Education Work Streams

## Path to transformation

- To build capabilities in core competencies for successful program management in large development/construction deals
- To reform project operations, functional/logistical, and management communications

### Knowing your stakeholders

- Without exception, stakeholder management is the single most important factor in any program or project. Stakeholders are defined in context of the role or function, but apply to your internal staff, board of directors, vendors, suppliers, and ultimately the client
- Managing and communicating with stakeholders, if properly structured, can often times be the biggest hedge against risk and can ensure mitigation of issues.

### Knowing your program

- A detailed description of the program, including design concepts, technical project plans, vendor/supplier dependencies, financial/budget management, and logistical support.
- A clear statement of the vision for the this development program
- A description of your program model geared internally for stakeholders, but also proper messaging for outbound communication.
- An analysis of your revenues, costs, and budget forecasts
- An honest assessment of your company's strengths and weaknesses
- An explanation of your marketing strategies

### Tracking your program progress

- A blueprint you can use to focus your energy and keep your program on track
- An action plan that anticipates potential risks or obstacles you may encounter
- A clear strategy for improving the vendor/supplier management process, mitigating risks, and ensuring quality control
- Benchmarks you can use to track and manage your performance & productivity
- A road map and timetable for achieving program goals and objectives
- A tool to use with staff to communicate the status of the program



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# A1 Training and Education

Illustration Only

Program and Project Management Training – Tailored for this Development Program

| | Description |
|---|---|
| Session 1: Introduction to Restructuring Programs | ▪ Introduction and overview of Project Management (PM) and Program Management Office (PMO) in context of program<br>▪ Relationship between PM and PMO |
| Session 2: Project Management Principles | ▪ Overview of key concepts, methods/processes and tools/templates of project management<br>▪ Group exercises related to project management templates/ tools (e.g. development of project charter) |
| Session 3: Program Mgmt. Office Principles Part 1 | ▪ Overview of program and PMO life cycle and its key steps<br>▪ Overview of key concepts, methods/processes and tools/templates of Program Management Office (PMO)<br>▪ Conduct practical group discussion and exercises |

| | Description |
|---|---|
| Session 4: Program Mgmt. Office Principles Part 2 | ▪ Key PMO responsibilities and activities related to running the program's project portfolio<br>▪ Overview of key tools and templates for running the PMO<br>▪ Conduct practical group discussion and exercises |
| Session 5: Governance and Stakeholder Management | ▪ Overview of good practice governance , stakeholder and change management in the program<br>▪ Discuss actual governance structure of program<br>▪ Discuss potential key stakeholders and change management needs of the program and ways of interactions with key stakeholders / conducting change management |



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# A1 Training and Education

Governance, Vendor/Contract Management, Budgeting, Stakeholder Management

| | Description |
|---|---|
| Session 1/2: Setting-up the Program Mgmt. Office | ▪ Review/ Refresh of key concepts of good practice Program Management Office (PMO)<br>▪ Structure, Role and Responsibilities of PMO in context of the program and discuss key stakeholders and ways of interactions |
| Session 3/4: Running the Program Mgmt. Office | ▪ Overview key processes, procedures, templates and tools to run a Program management Office<br>▪ Conduct practical group exercises related to key tools and templates (e.g. conducting PMO meetings, issue escalation, etc.) |
| **Session 5/6: Managing the Program Portfolio** | ▪ Overview of methods how to identify, prioritize and select initiatives (projects) to the program portfolio<br>▪ Methods on project/ initiative performance review and managing project portfolio |

| | Description |
|---|---|
| Session 7/8: Generating Reports | ▪ Overview of key PMO and PM reports and their respective templates<br>▪ Conduct practical group exercises related to report generation (e.g. status update report) |
| **Session 9/15: Company Implementation Plan** | ▪ Develop /further detail key transformation initiatives forming the implementation plan of the company restructuring<br>▪ Conduct/ review prioritization and scheduling of program initiatives |



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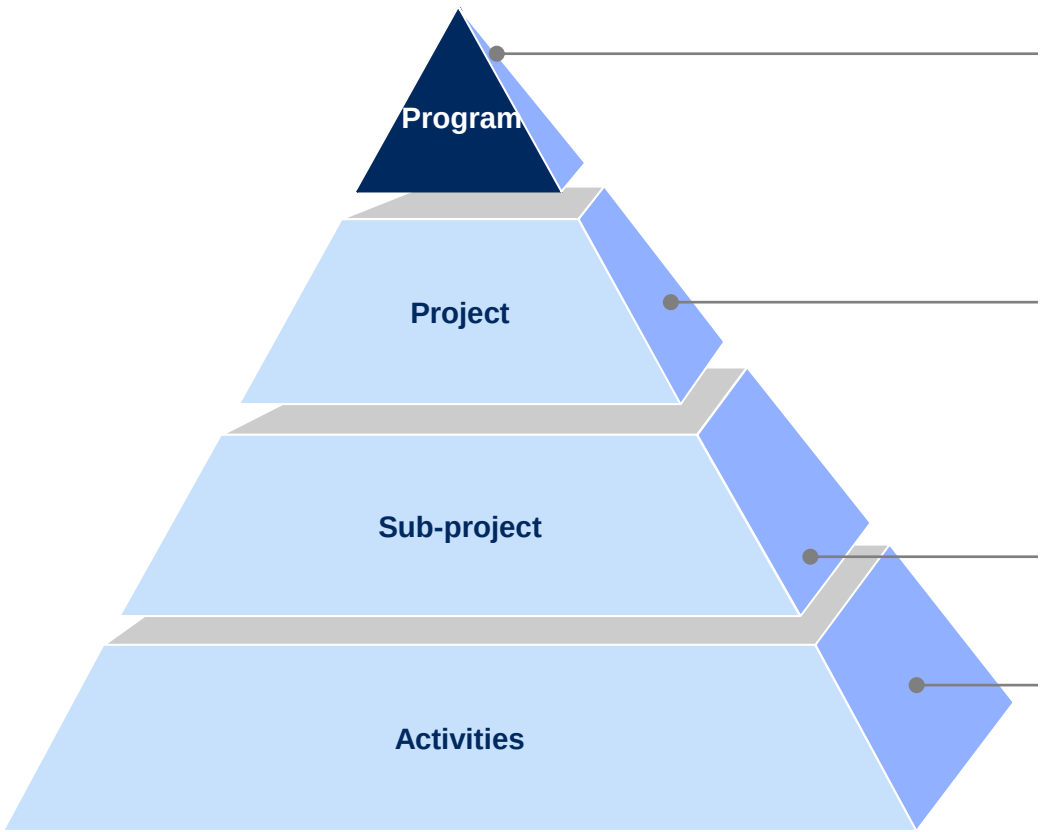
# A2 PMO Setup and Planning




| Responsible | Definition | Example |
|---|---|---|
| PMO | Portfolio of interdependent projects overseen by a unit which drives change in an overall program | Mecca Development program |
| Project Manager | Sequence of activities with aim to achieve on of the goals of the program in defined time with defined resources | Contractor Selection and awarding |
| Project/Sub-Project Manager | List of activities or working groups within the project | BOQ development |
| Team members | Concrete, defined action required to achieve the sub-project/project goal with a clear output | Concept design |



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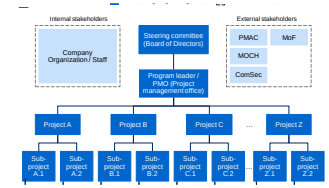
# A2 PMO Setup and Planning

## A PMO organization and program governance

- Establish clear governance for transformation program
- Implementation by line management, steered and controlled by PMO head; direct PMO head involvement in high-impact cross-functional topics
- PMO established to support CRO and control program
- Project teams set up, where necessary

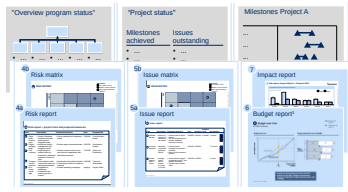
### Program Structure




## B Monitoring

- Regular implementation monitoring and effect controlling
- Regular update and reporting processes established (generally weekly)
- If required, additional rolling cash forecast might be required in addition, when cash situations tightens

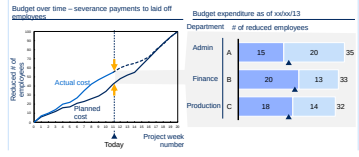
### Reporting System




## C Impact tracking

- Incorporation into mid- and long-term planning
- Incorporation of full financial impact (recurring, one-offs, investments)

### Impact report



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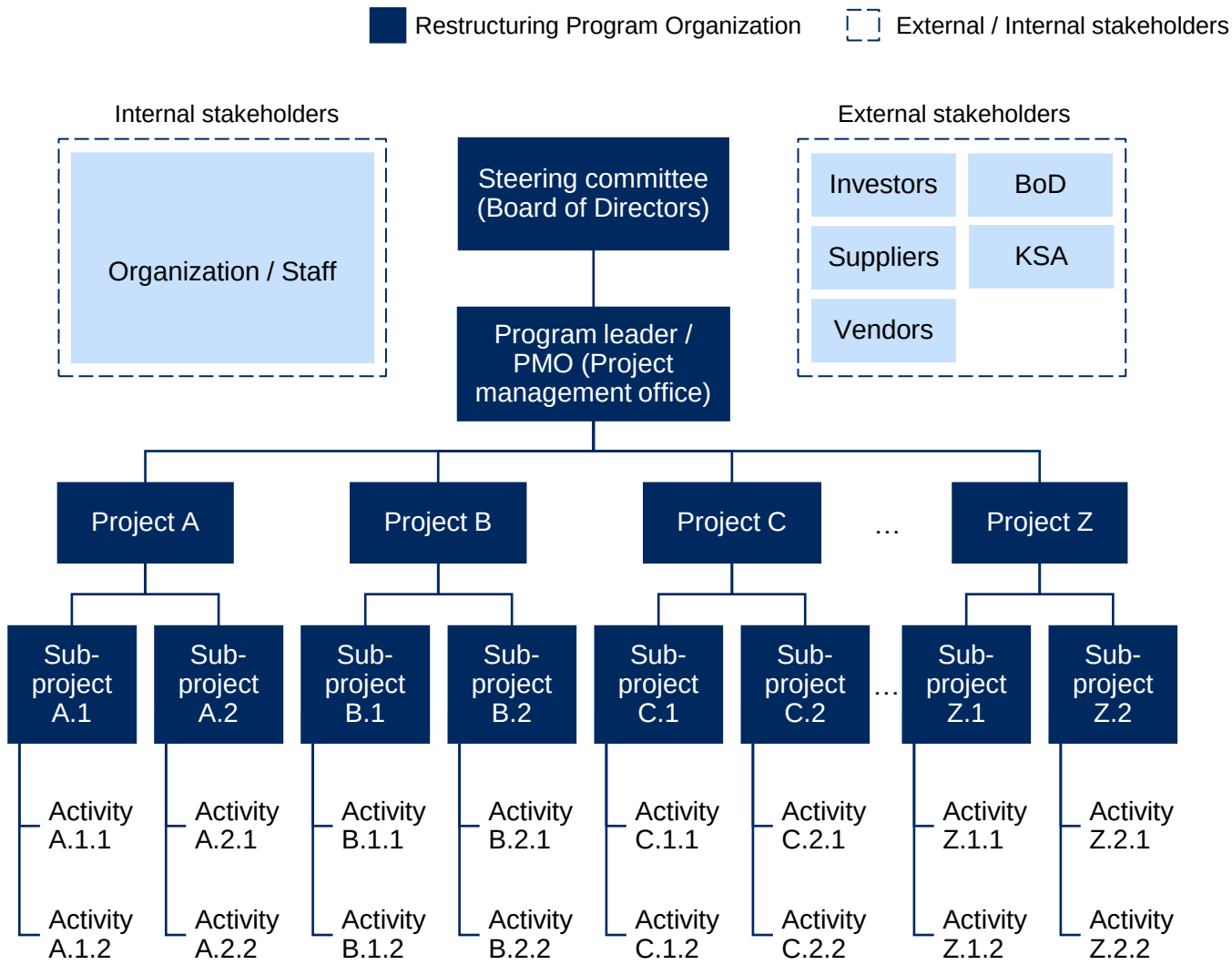
# A2 PMO Setup and Planning



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# A2 PMO Setup and Planning

Full-time resource

Affiliated

**PMO Leadership**

- Liaison with Steering Committee including CEO and top management
- Management of PMO resources
- Conflict resolution

**Actions taken by PMO**

| Program Planning | Program Controlling, Tracking, and Financials | Program administration (HR and IT) | Program Communication |
|---|---|---|---|
| ▪ Meeting calendar | ▪ Baseline development | ▪ Project staffing | ▪ Internal level |
| ▪ Master Plan | ▪ Target setting | ▪ Logistics planning | ▪ External level |
| ▪ Project tools | ▪ Reporting system | ▪ HR issue coordination | |
| ▪ Reporting templates | ▪ Financial impact measurement | ▪ Required Infrastructure | |
| ▪ Budgeting | ▪ Impact measurement | ▪ Tracking tools | |
| ▪ Coordination of data requests with company resources, i.e. HR/IT | | | |
| ▪ Issue resolution | | | |

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# B1 Planning and Structure – Develop an Implementation Plan and Structure

| | A | A | B | B | B |
|---|---|---|---|---|---|
| | Define program and governor structure | Establish and staff and | Identification and high level scoping of ideas | Evaluate new & existing project ideas & get approvals | Develop master plan, identify project manager and set KPIs |
| Activities | ▪ Develop PMO charter including objectives, milestones and KPIs<br>▪ Define key hierarchical levels and reporting structure within the PMO program<br>▪ Get approval to charter and structure | ▪ List potential candidates for the PMO program including position and responsibilities,<br>▪ Hierarchical and reporting structure within PMO office<br>▪ Get approval to staffing and office structure<br>▪ Train PMO Staff | ▪ Build on setup plans from work stream A<br>▪ Conduct workshops with key team leaders to identify/ concretize and prioritized project inline with program objectives<br>▪ Outline scope, approach/ and implementation time for identified project<br>▪ Understand current resource boundaries | ▪ Develop high-level impact estimation for projects<br>▪ Prioritize<br>▪ Align and adjust project<br>▪ Syndicate with key top management and request approval from steering committee for portfolio update | ▪ Develop/ update master implementation plan<br>▪ Identify project managers (PM)<br>▪ Conduct detailed planning and KPI target settings<br>▪ Develop / Update “impact dashboard”<br>▪ Syndicate with key top management |
| End products | ▪ Approved program and governance structure | ▪ PMO established and staffed | ▪ List of projects with high-level scoping | ▪ Prioritized list projects<br>▪ Approved portfolio list of projects | ▪ Master implementation plan<br>▪ Program and project KPI targets<br>▪ Impact dashboard for tracking impact realization of projects |



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# B1 Planning and Structure – Develop an Implementation Plan and Structure

| Sequence | Activities | Key players: Steering Committee | PMO head | Project head | Planing head* |
|---|---|---|---|---|---|
| Set-up; Design / Re-evaluate and modify program | 1 Project kick-off | ✓ | ✓ | | |
| | 2 Preparing project initiation documents | | ✓ | ✓ | ✓ |
| | 3 Signing of documents | | ✓ | ✓ | |
| | 4 Steering Committee Review | ✓ | ✓ | ✓ | |
| | 5 Project work | | | ✓ | |
| | 6 Preparing tracking tool | | ✓ | ✓ | |
| Run | 7 Regular review cycle | ✓ | ✓ | ✓ | ✓ |
| Phase out | 8 Finalization | ✓ | ✓ | ✓ | ✓ |



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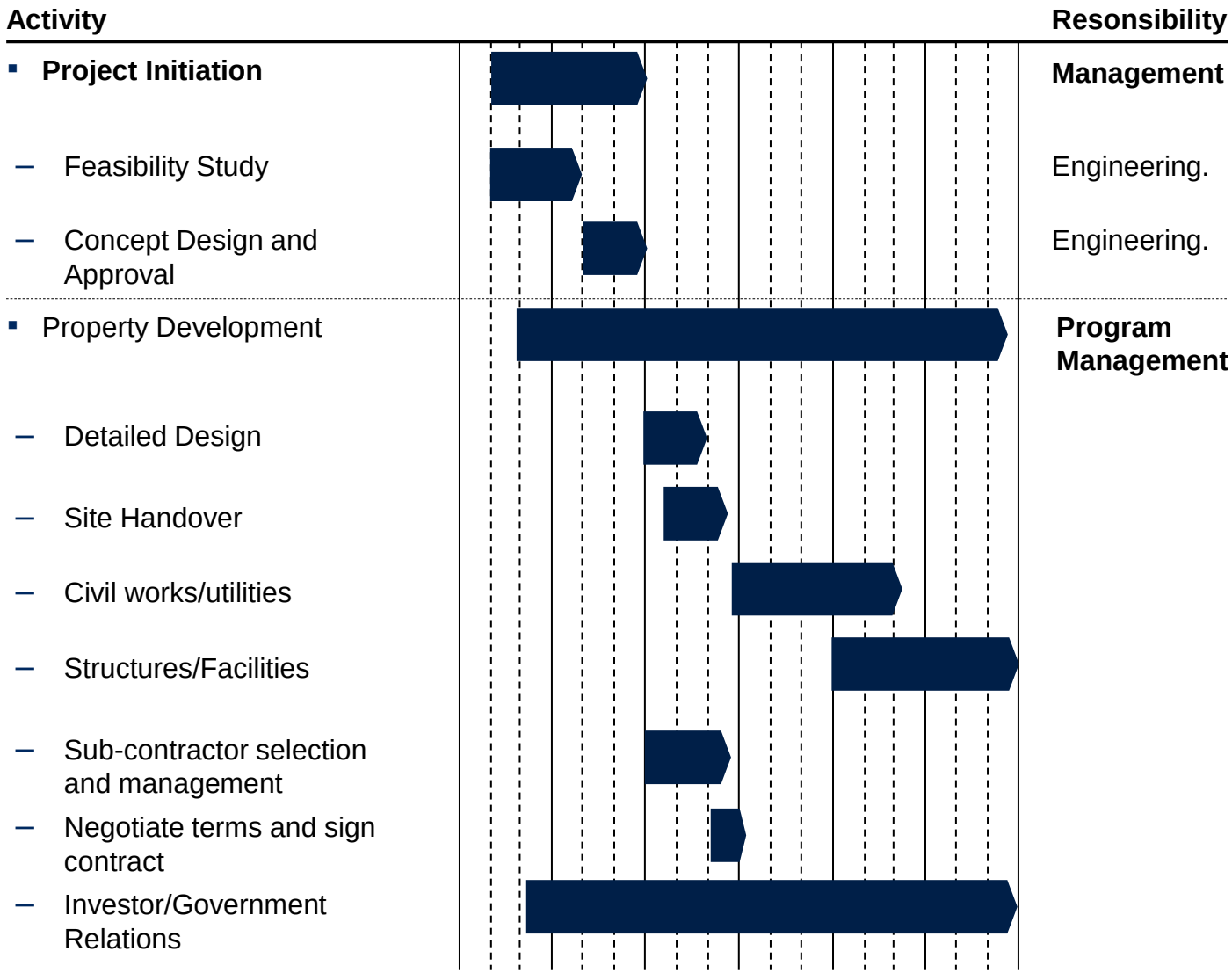
# B1 Planning and Structure – Develop an Implementation Plan and Structure

Illustration Only

## Approach

- A good implementation plan covers 5 areas
  - Calendar implementation schedule
  - Major milestones
  - Important connections and inter-dependencies between the work assignment groupings
  - Clearly defined responsibilities



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# B2 Planning and Structure – Establish Shadow Management Structure

Having guided you through the initiation and planning phases, we are prepared to provide to kinds of support as the program advances into full execution:

There are pros and cons to both options, and we always encourage discussion and must agree on this for the engagement.

**1** Leadership of the PMO in full:

At your request, we will serve as the PMO manager for the first 6-12 months. This would include the PMO Manager represented in the Executive Review Board. In these cases we would strongly recommend that you have already selected a candidate so that they can participate, be educated, and then work with us towards a smooth transition when the time comes.

**2** Shadow management of the PMO Leader you have selected:

The reverse of number 1 above, we will serve as the advisor and consultant to the PMO and to the Executive Board, but the management of these functions will be done by your selected candidate.



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# C1 Implementation – Executive Review Board Management

| | | | In the Report | Reviewed in ERB |
|---|---|---|---|---|
| I1 | **Program Review** | | | |
| | I1-1 | Project Charter | X | |
| | I1-2 | Project Plan | X | X |
| | I1-3 | Project Resource Plan | X | X |
| | I1-4 | Project KPI Tracking | X | X |
| I2 | **PMO Project Status Review** | | | |
| | I2-1 | Project Status Update | X | X |
| | I2-2 | Project Risk Assessment | X | X |
| | I2-3 | Project Issue Log | X | X |



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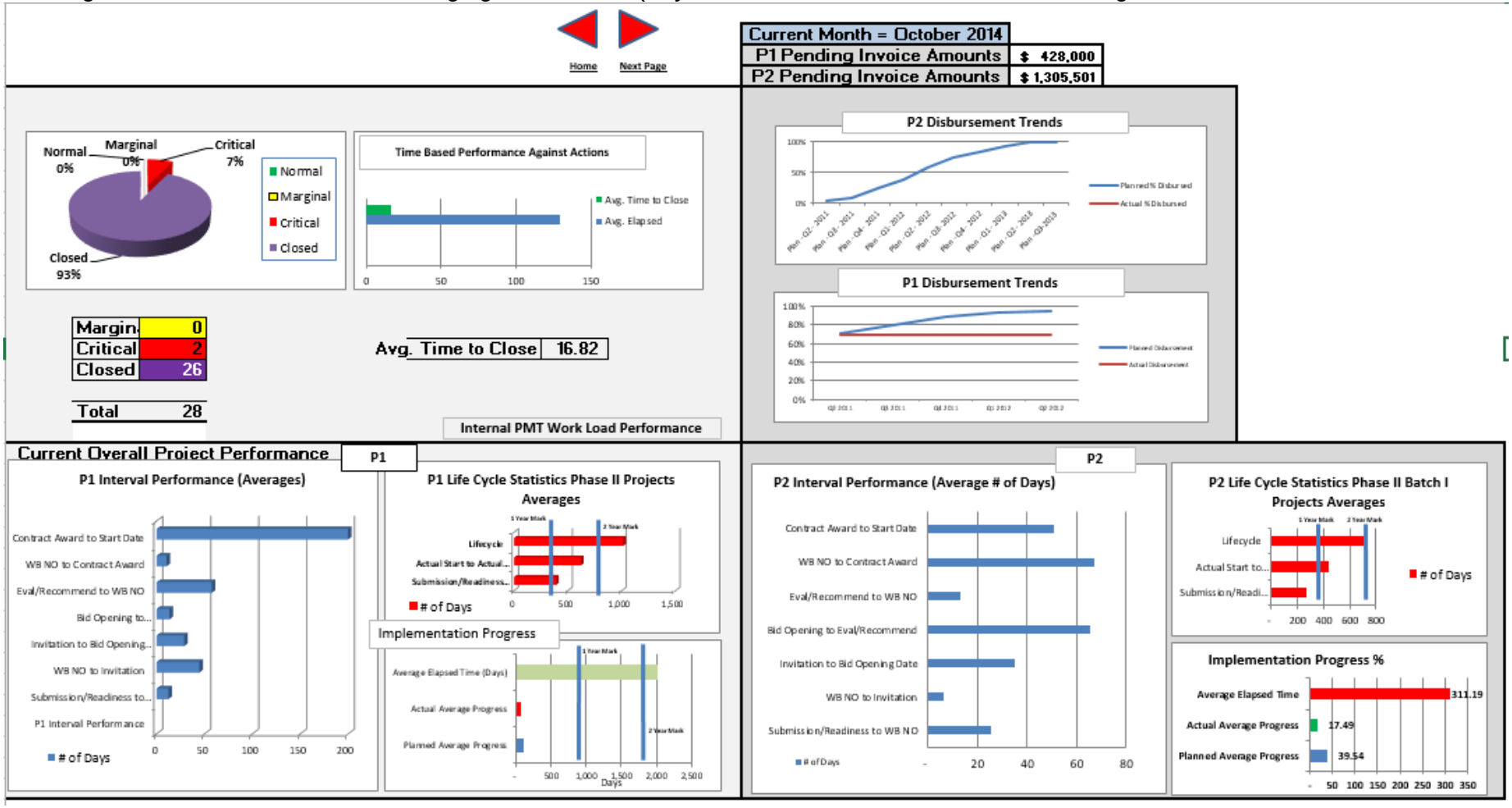
# C1/2 Implementation – Executive Review Board Management

Segment 1 of the ERB review meeting agenda. – KPIs (Key Performance Indicators and Overall Program Status




The ERB Meeting will cover key performance indicator reviews (physical and financial progress), trends and deficiencies as the first segment of the review meeting.



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# C1/2 Implementation – Executive Review Board Management

Segment 2 of the ERB review meeting agenda. – Project Status Overview with Risks/Issues Escalation

| | |
|---|---|
| Project Index | •P1.1 |
| Project Name | •XXXXX |
| Project Manager | •XXXXXX |

[NAME HERE]

Final Due Date

_31_/ _03_/_2015__

## Program Description

## Major Actions for Current Month

| | | | |
|---|---|---|---|
| Action 1 | • xxx | Due | • 25/01/15 |
| Action 2 | • xxx | Due | • 25/01/15 |
| Action 3 | • xxx | Due | • 30/01/15 |
| Action 4 | • xxx | Due | • 31/01/15 |

## Major Milestones

| Q1 | Q2 | Q3 | Q4 |
|---|---|---|---|

## Current Overall Status

## Dependencies

| Supplier X | Sub-contractor | Finance | Procurement | Management | KSA | PMO | | | |
|---|---|---|---|---|---|---|---|---|---|

## Next Steps/Actions/Escalations

| | |
|---|---|
| Item1 | • xxxx |



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# Content

Overview of Principles and Approach

Integrating Quality Management into Governance

Work Streams and Outcomes

**Related Experience**



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# Related Experience

| | |
|---|---|
| **Name of Contract:** | **State Company Restructuring and Program Management** |
| **Name of Company:** | Government of Iraq, Baghdad, Iraq |
| **Point of Contact:** | Stephen Rimmer |
| **Role** | Contractor |
| **Contract/Order Number:** | |
| **Contract Type** | Fixed Firm Price |
| **Period of Performance:** | 01/01/10-05/31/2014 |
| **Final Delivery Date:** | May 31, 2014 |

**Summary of Work Performed:**

Since 2010 we have worked with a number of different Ministries in Iraq as well as State Owned Companies under a variety of restructuring, program management, and business transformation projects. This includes full strategy and market strategy development, business planning, and operational planning, as well as program management office setup and execution. We have specialized in the past 18 months in our work with the Ministry of Housing and Construction focusing on construction companies owned by the Ministry. We have led and engineered these programs, have worked with the company in their quality management program initiatives, assisted them in evaluating their current service lines in the construction area to better align with the Iraqi construction market, and have managed these project at the PMO level.



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# Related Experience

| | |
|---|---|
| **Name of Contract:** | **School Building Project** |
| **Name of Company:** | Ministry of Education, Baghdad, Iraq |
| **Point of Contact:** | Waseem Al-Muqdadi |
| **Role** | Contractor |
| **Contract/Order Number:** | WB-0200 |
| **Contract Type** | Time and Materials |
| **Period of Performance:** | 01/01/09-12/31/2011 |
| **Final Delivery Date:** | March 31, 2011 |

**Summary of Work Performed:**

Program management and Monitoring Evaluation Officer for the World Bank sponsored School Building program for the Ministry of Education in Iraq. Between the Grant and the Loan from the World Bank the value of this program was around $250M USD. The program was designed to build new schools and expand existing schools throughout the country. Work performed and specific responsibilities were to assess the existing program management team, establish proper monitoring and evaluation governance, get the program into compliance relative to reporting, progress, and financial progress, and to serve as a dispute resolution risk management liaison with contractors.



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# Related Experience

| | |
|---|---|
| **Name of Contract:** | **Program Management Office Outsource** |
| **Name of Company:** | Zain Iraq, Baghdad, Iraq |
| **Point of Contact:** | Ali Al-Chalabi |
| **Role** | Contractor |
| **Contract/Order Number:** | ZIQ-15112006 |
| **Contract Type** | Fixed Firm Price |
| **Period of Performance:** | 12/31/07-12/31/2009 |
| **Final Delivery Date:** | December 31, 2009 |

**Summary of Work Performed:**

Full outsource management of Program Management Office for Zain Iraq. This includes management and prioritization of all Zain Iraq programs and operational initiatives. This included previous engaged statement of work plus full responsibility for management of programs. Including: Established Governance Charter, Methodologies for project portfolio, project management methodologies, training and knowledge transfer, key performance indicators and management, and direct management. Established strategic assessment criteria for IT platforms and systems to determine strategic fit, business alignment, process maturity, and productivity. Develop requirements standards definitions for all enterprise platforms and map to business processes. Establish quarterly evaluation criteria of program implementation against cost/budget and measurement criteria for end user satisfaction and productivity gains.



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# Related Experiences

| | |
|---|---|
| **Name of Contract:** | **Program Management Office Creation** |
| **Name of Company:** | MTC Atheer, Baghdad, Iraq |
| **Point of Contact:** | Ali Al-Dahwi, CEO |
| **Role** | Contractor |
| **Contract/Order Number:** | MA-15052005 |
| **Contract Type** | Fixed Firm Price |
| **Period of Performance:** | 5/16/05-05/17/2006 |
| **Final Delivery Date:** | May 17, 2006 |

**Summary of Work Performed:**

Established Governance Charter, Methodologies for project portfolio, project management methodologies, training and knowledge transfer, key performance indicators and management, and direct management. Established strategic assessment criteria for IT platforms and systems to determine strategic fit, business alignment, process maturity, and productivity. Develop requirements standards definitions for all enterprise platforms and map to business processes. Establish quarterly evaluation criteria of program implementation against cost/budget and measurement criteria for end user satisfaction and productivity gains.



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# Related Experience

| | |
|---|---|
| **Name of Contract:** | **IT Transformation** |
| **Name of Company:** | Zain Iraq, Baghdad, Iraq |
| **Point of Contact:** | Riyad Al-Sarraf, riyad.alsarraf@zain.com, +9659006107 |
| **Role** | Contractor |
| **Contract/Order Number:** | ZIQ-15112006 |
| **Contract Type** | Fixed Firm Price |
| **Period of Performance:** | 01/01/09-12/31/2009 |
| **Final Delivery Date:** | December 31, 2009 |

**Summary of Work Performed:**

Program management of IT Organizational Transformation including strategy, best practice alignment, policy procedure assessment, and governance. Systems assessment, application flows, data flows, use case analysis, strategic architecture assessment, performance against capital budget, end user application requirements, annual application prioritization for implementation, life cycle management and change management implementation, usability analysis and methods implementation, post implementation support and management, help desk work flow, business process work flows, configuration management standards and initial ITIL implementation.



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