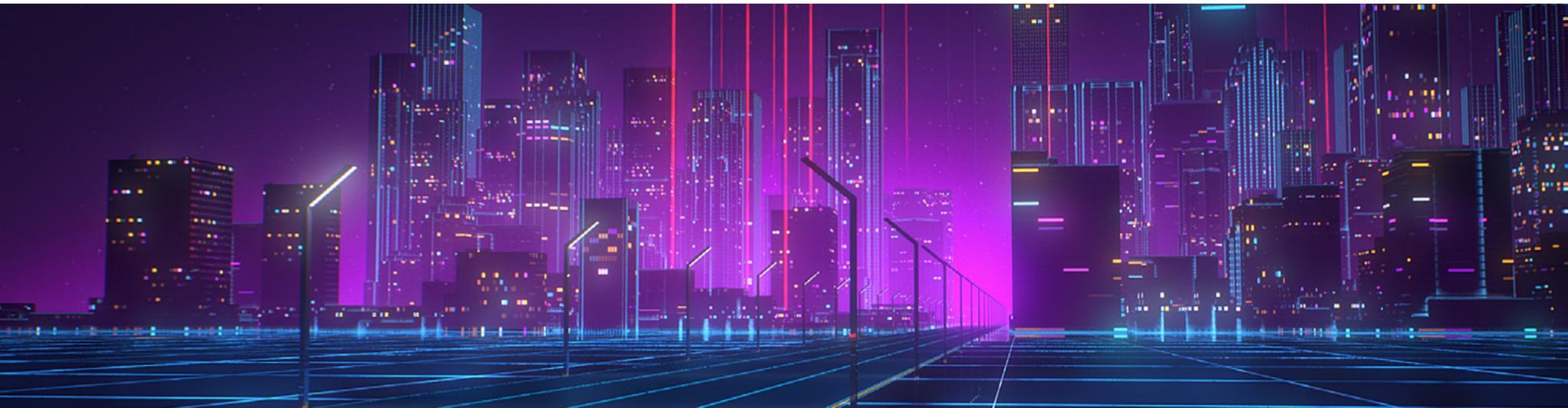


PPM Intelligence

magazine
#2201



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Editorial #001

Welcome to the first edition of our new quarterly magazine, **PPM Intelligence**. If you are already a Wellingtone follower, you will know we publish a monthly newsletter; PPM Intelligence. This quarterly review features the most popular articles from the last three months along with chunky PPM guidance to sink your teeth into.

Every organisation runs projects and the challenges of delivering benefits on time, at the right quality, for the right price is as relevant as ever.

Most organisations struggle to balance the demands of a packed portfolio, juggling

limited resource trying to achieve success.

We know from our work that every organisation can achieve transformational change in project and portfolio management maturity. We often talk about the four enables: technology, the PMO, methods & governance, and, training & support. I would encourage you to dive into these articles in the hope they provide tasty food for thought as you consider your journey to PPM maturity.

Enjoy these articles, visit our web site, stay up to date with our latest PPM research and register for our events. **Learn, share and grow. Enjoy.**



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Setting Up a PMO? Follow These Steps to do it Successfully



Emma Arnaz-Pemberton

It is often the case that along with the experience of project, programme, or [change management](#) comes to the responsibility of setting up a PMO. “It’s just another project”, right?

No. Complementing the current Project Management practice in an organisation is no small feat and should be considered and thought about before embarking on the delivery of a brand new function.



PMOs are critical for the successful delivery of projects and change

The above statement is true. However, there is a perfectly legitimate reason why an organisation may choose to not have a PMO in place. Maybe the organisation is very small and cannot justify the spend to set up a new department. Maybe it is perceived as difficult to support a function that doesn’t (necessarily) directly deliver projects or value to the critical bottom line. Whatever the reason, and although PMOs are indeed critical to successful delivery, as the Business Leader setting up the PMO, we must take time to understand the rationale, the why; or the why not.

Things a Business Leader Can Do to Help Successfully Set up a PMO

1) Know Thyself

The first step is to look inwardly and understand where your strengths lie in terms of setting up a PMO. With project, programme, or change management experience it is easy to assume the job is basically the same. But do not get blinded by your own ego!

With the identification of your strengths, you will also find weaknesses, areas of PMO you do not fully understand or even believe in.

Top Tip: Learning is doing

Educate yourself on the key aspects of setting up a PMO utilising tried, tested, and independently reviewed content such as the Wellington PMO Practitioner or Change Management Practitioner courses and wider Academy.



How to set up a PMO when faced with resistance

Now, the Technicalities

Setting up a PMO can bring with it resistance so below are some of our key themes that will help to reduce resistance, and provide a stable base for your PMO to embed, grow.

1) Manage and Organise the Setup as a programme

Several streams of work will need to happen for a PMO to be successfully defined, designed, and delivered. Considering the project management experience, you may already have, acknowledge that the requirements gathering and delivery of each stream needs a different set of skillsets.

This means two things:

You should not be doing everything yourself! You need different teams to deliver different aspects

Knowing this, logically you should organise yourself as a Programme of Work. Remember the definition from the APM:



A unique, transient strategic endeavour undertaken to achieve beneficial change and incorporate a group of related projects and business as usual (steady-state) activities.

APM Body of Knowledge – 7th Edition, APM

Top Tip: As a Programme of work, it is imperative that you have a Change Management specialist working alongside you to fulfil the responsibilities required for successful change management and embedding of transformational change.

2) Know the Organisation

Take the time (if you don't already) to understand the **organisational culture**. Remember that culture is a tricky thing, it will drive how things get done, what is important, how people talk, as well as behaviours seen in the organisation.

Do not assume that the PMO model you had in a previous company (or that you read in a book), applied blindly, will automatically work. With culture, comes the **project management DNA**. And every organisation is different.

Top tip: Call 3 people

Call 3 people that have been involved in delivery to understand what works and what doesn't. If a PMO has existed before, call those people, and understand why it was disbanded. Remember to ask what works well (good stories will help you to achieve a balanced view of reality).

3) Know your Customers

Considering the PMO as a provider of services, we must understand our customer's needs. PMO Customers are often defined as internal people and teams who are involved in or impacted by, or interested in the project management practice in the organisation (Wellington).

Identify who your key customers are, and work with them to identify the best fit practice solution for your PMO need.



2) Build a Business Case

Ensure that you take the time to create a Business Case. This enables a variety of things to occur:

You can do research to identify the need, best response, and define the PMO and its customers
You can take the time to design the right best fit practice model that will support the organisational culture

You can manage the expectations of your Customers through the approval process, ensuring that there are no nasty surprises after you have delivered your solution
Allows for portfolio inventory to take place so you get a feel of what is already available and how many projects are underway.

Top Tip: Remember that there will likely already be some structure in place in the form of templates like a RAID log, processes that have allowed project accounting to take place, amongst others. It may be that they exist in pockets of excellence and are not standardised. And if this is the case, then consider that your PMO is not starting from scratch and has something to start working with.

3) Collaboration is the Key

The PMO is not about showcasing you or your years of expertise, it is in fact about managing the PMO FOR projects. For the Customers.

Relationships are the key to successful PMO development. Focusing on building a community

of practice that enables sharing of ideas and experiences will support your bid to win over your Customers with enhanced discipline and 'bureaucracy' that will respond to the need for the PMO in the first place.

Top Tip: Remember that resistance is inevitable, but most reasonable professional human adults will not walk out of the room if we work with them and explain the overall aim of what your PMO is trying to achieve.

4) You Actually DO Need a Roadmap

Many believe that they can develop the PMO organically. However, this approach often fails to deliver true maturity in the project management practice long term. Organic growth is great once the team is embedded, and the community self-sustaining.

To build an effective roadmap, consider mapping your organisational maturity with a benchmarking exercise (maybe even against other companies in your industry), and figure out what level of maturity you want to get it. Take a look at the [Wellington PMO Maturity Assessment](#) for more info on how this works.

Remember to stretch but also be realistic with your aspirations. If you are starting from zero, level 5 out of 5 might be ambitious on your first pass.

Top Tip: When developing your roadmap, don't look further out than 18months – 2 years. The world is volatile uncertain, complex, and



ambiguous, so you can safely assume that your environment, scope, and objectives will change over time.

5) Plan for Engagement

The power of a good engagement strategy should not be underestimated. If we don't plan for communication, learning, and sharing events, they will inevitably fall by the wayside when everyone remembers that they are time-poor and have too much to do.

The single biggest organisational challenge is trying to do too many things at once

Plan in advance and commit to your engagement plan to ensure that your Customers become and remain engaged, and your relationships continue to flourish.

As integrators of people, process, knowledge, and structure it is the PMOs responsibility to ensure that the community feels like they have a safe space in which to develop, fail, and succeed.

Top Tip: Get your engagement plan online through your intranet or SharePoint spaces to ensure that your Customers have constant visibility of the next opportunities to engage, and the act of publishing will help the PMO team to commit to them happening.

In conclusion

There is no one size fits PMO. That makes the journey extra interesting!

Taking the time to define, design and deliver the PMO thoughtfully, with the end goal in mind, and with a virtual head-on, will ensure that your best fit practice approach supports the organisational DNA, culture, and current portfolio of change.

Remember that your Customers are **#HumanFirst** and as a PMO we need to engage with the humans first, the delivery individuals second. Do this and your PMO is bound to succeed.

Take a look at our other article on our [FuturePMO website that can give you more tips in setting up a PMO](#) and can help to supplement the information from this article. Our [PMO 3D transformation service](#) can also give you a head start with some key steps.

W.

Communities of Practice in Project Management



Emma Arnaz-Pemberton

We talk a lot about processes that PMOs can bring to organisations to enable the successful delivery of change. And, if you read posts and blogs it seems to me that PMO people are always trying to avoid failure. This article will look to explore communities of practice within the project management industry.

Which is why when launching the 'Wonder of Project Management Month' for the Major Projects Association Knowledge Hub, I asked people to post the great things that this industry brings to the fore. There wasn't much response, which is disappointing but that got me thinking about why that is.

It could be all about our human nature to focus on the negative – we all complain when we have bad service but rarely speak up when it was great. Or maybe it's because our industry is hard work, and PMO is in the tricky position of trying to engage and control at the same time and we spend a large chunk of time feeling frustrated.

Over the years judging and being involved in the [Association for Project Management](#) 'PMO of the Year' Award (originally Sponsored by Wellington), I have been impressed with all the

finalists. One of the key areas where they stand out for me is their passion and enthusiasm for what they do, what they have achieved, and how they do so often in unprecedented times and situations. Their passion is evident even as they charge up to receive their award, or share virtually their success. That has given me a small piece of what might be missing.

I hosted a webinar for the [APM PMO SIG on Embedding a PMO Culture effectively into organisations](#) and was surprised at the positive response it got from people across the industry. I tried to figure out why people felt positive about that hour and asking some people what value is added to them gave me a second crucial piece.

Ever been told you are too passionate? I have – I learned early on in my career when to channel that into productive 'get stuff done' energy and when it is OK to be a little bit zany.

And because of my interest in people, I always say you can't half 'do' [communicating](#). You either commit 100% or you don't. Anything in the middle won't work.

Communities of practice are the same.

PMO 3D

Wellington
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The PMO sits at the heart of your organisational project, programme, portfolio and work management. Often undervalued, the PMO should have a defined remit to deliver value for its customers, as well as a clear identity within the organisation.

Our **3-Day package** is a great place to start your **PMO transformation** journey regardless of your current position. This focused engagement works through three clear steps: **Define**, **Design**, and **Deliver** to create immediate tangible & practical benefits. So, if your PMO has been in service for many years, or is a brand-new requirement, our **PMO 3D Transformation** package is for you!

[LEARN MORE](#)

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Communities of Practice in Project Management

You can't half 'do' community – you have to be 100% committed, passionate about bringing people together, and proactive with the knowledge that comes out of it.

According to Researchers Etienne and Beverly Wenger-Trayner, communities of practice are made up of three things; an area of interest that is the domain of the community, joint activities that people can choose to attend, and real practitioners. Only when these three occur can you achieve collective learning and a true community of practice.

Maybe this is the missing link; we spend so much time dealing with processes and measures and methods that we let the one area that can truly mean the success or failure of organisational change go by the wayside as soon as things get busy – communities of passionate people.

Communities are built only with preparation and commitment. They don't appear by magic.

Key to success for communities of practice

- > Is your organisation ready for the change that it is hosting? Depending on this answer will tell you how your community needs to be positioned. Is it going to bring people together to support the organisation through difficulties or is it to promote and develop [project management maturity](#) because everything is in a good place?
- > Where do you sit in the organisation? Are you as the champion of this initiative new to the organisation? If you are, are you being sensitive to the cultural reality of your surroundings? At Wellington, we believe that every organisation has its own [Project Management DNA](#). So, if you are trying to put your 'stamp' on things, that's good and the right thing to do but don't forget to walk a mile in the shoes of those you are trying



to engage with. A copy-paste approach from your previous organisation will rarely work.

- > What state is your PMO in? It is always a good idea to begin this kind of activity following a [maturity review](#). This way you can understand where you are, what your challenges are, and what you do well; just like people management, understand strengths and weaknesses and work with those.
- > Building relationships is a time-consuming thing to do – one that sometimes we are too busy to commit to. Rather than picking up the phone or walking to the next office, we send an email. Instead of taking time with colleagues to find out what's happening in their world, we eat lunch alone at our desks. Taking the time to build genuine relationships will make your community of practice become self-sufficient; which by definition means PMO is more successful.

A big part of securing your PMO future comes down to (in my view anyway) how you engage with your customers and audience. If you have people

on your side, they see more of the value you bring head-on because they are part of your journey. After all, no one destroys what one helps to build.

The 2022 Perspective

Now more than ever, the community is key in transforming our project management practice in order that it works in the new work economy of virtual working and dispersed teams.

Project teams have seen two years of continuous change; change of projects, change of teams, change of technology, and the list goes on. However, the one thing that remains is the need for human connection.

Many project teams and PMOs haven't spoken to those they don't work directly with for a long time. Because we are all time poor we get to the end of the day and realise we didn't connect with anyone that day.

PMO and project teams are still not great at communicating our successes. So, remember that change is a process, not an event, and as 2022 gets underway challenge yourself to some of the tips below to make your community thrive and be 'sticky' enough that engagement continues to grow.

How to make the communities stick

- > You can't just start to build a community and hope for the best. Also, not many organisations will approve you to start doing so without a case for change.
- > So, my advice is to start off working on your own relationships and get enabled with technology.
- > Building new habits take approximately 13 weeks – so why not challenge yourself in the new year to do some relationship building. It doesn't have to be a big change; a phone call, a virtual coffee, a LinkedIn connection.
- > But if you commit to three months of one small new thing a day, all the little changes will add up to your PMO and project success. from June to September.

Enabling YOU to make a step-change in your PPM Maturity

PMO & P3M3 & Project Management Maturity Assessment

To achieve a new vision for Project, Portfolio and Work Management you first need to understand where you are. Our PPM and PMO Maturity Assessment combines our expertise as an [Axelos P3M3 Consulting Partner](#) with our in-depth data analysis and expertise.

1. INITIAL

There is no defined processes; there is no PMO team in place or any measures.

3. STANDARDISED

All processes are detailed, educated and repeatable; there is a PMO in place providing guidance and limited education; there is some measurement of high-level KPIs which are communicated to direct management.

2. DEFINED

There are pockets of excellence and some processes but application is largely down to the individual: there are defined skills xxx within the organisation, not necessarily within a dedicated PMO function; there are no measures in place.

4. MANAGED

All processes are embedded and utilised consistently: there is a dedicated PMO function that enables communication, learning and a culture of change; there is a consistent method to measure both projects and the PMO to senior management.

5. OPTIMISING

Processes are continuously reviewed and improved; the PMO is respected as a centre of excellence and provides a career path to project professional: the performance of both projects and the PMO is measured and informs decision-making.



Our independent maturity assessment and benchmarking provides:

- Data informed by best practice
- Comparison against extensive benchmark data
- Areas of strength
- Areas to develop
- Practical recommendations and a PPM/PMO Maturity Roadmap
- A case for change
- A baseline from which to assess improvements over time



PMO MATURITY RADAR



What Does a PMO Do: the PMO Service Catalogue



Marisa Silva

How many times have you heard the question “what does a PMO do”? Just about ten, really? Lucky you, since it is almost as popular as the infamous ‘what does the P in PMO stand for?’. The sad reality is that many PMOs are not communicating their value as well as they could, or they may be trying to do so many things at the same time that is difficult to understand what it is they are trying to achieve. So...let’s tell the world. That’s where the value of a tool such as a PMO Service Catalogue lies.

What is a PMO Service Catalogue?

It is exactly what it says on the tin – you got it right, a catalogue or, if you prefer, a menu of services provided by the PMO. In its simplest form, it can be a plain list of services to assist project teams and decision-makers, however, in its more sophisticated format, it can be a game-changer on how people perceive their PMOs and the value it brings to the table. The value of something is always difficult to assess, particularly when the

PMO is not directly contributing to project delivery but is an enabler instead. While it may be true that value is in the eye of the beholder, explicitly stating what you offer, even if for free (!), can set a new expectation towards the work of the PMO and you’ll soon find people wanting to know more about services they were not aware they could get from you.

What does the PMO Service Catalogue include?

The PMO Service Catalogue can be created and shared using a variety of tools, from slide decks to interactive platforms, but the more comprehensive ones tend to contain the following:

- > **Service Name:** a short, nice, and simple title to identify the service
- > **Description:** a brief narrative of what the service entails

- > **Category:** identifies the category that the service relates to within the PMO offering
- > **Target User:** clarifies who is the service intended to
- > **Key challenges:** lists the key pain points that explain the why of the service
- > **Benefits:** a brief explanation of the benefits of the service; it should answer the questions 'what's in it for me?'
- > **Process:** clarifies what are the associated steps in the process, from the moment the service is requested up to when it is delivered or measured
- > **Specialist:** in larger PMO teams, specialist roles will be the most appropriate to run the service (e.g. Risk specialist; Comms; Scheduling, etc.)
- > **Frequency:** determines the frequency, recommended or actual, for delivering the service
- > **SLAs:** refers to the commitment to deliver the service within an agreed timescale or level of quality
- > **KPIs:** Identify the key indicators that are going to be tracked by the PMO to measure the performance of the service.

Besides describing what the PMO does, a Service Catalogue can be used as a tool to set expectations and boundaries too by clarifying what is in and out of scope for the PMO or what is not available yet but is in the PMO roadmap. Similarly, it can be utilised as a performance tracking mechanism, where the PMO can easily assign a RAG status to how each service is performing over time. The possibilities are endless when creativity is at play.

But before you leave in a rush to implement such a powerful artefact in your PMO toolkit, let me just share a couple of hints and tips which may save you some time:

- > **Make it visual:** pictures do tell stories and are worth a thousand words, the saying goes
- > **Make it simple:** less is, often, more and the same goes to what is in your Service Catalogue
- > **Make it fun:** avoid jargon and acronyms, there are already too many of them; instead, make it fun for people to interact with
- > **Share it. Please:** do not just draft a Service Catalogue and tick a box in the 'PMO best practices textbook', leaving it to rest in a pile of paperwork. Do bring it to life and share it. After all, the Catalogue is not for you but for others.

Proposal for Librarian Service

2 Definition and Scope: Describes the activities PMO staff will perform as part of the service

3 Benefit: Describes the various hard and soft benefits the customer will receive from the service

Service Name: Librarian Service
Target User: Project Manager



Meet **Catherine**

"I am responsible for making sure our project teams leverage standard templates, tools, processes, methods and guides to deliver their projects"

My Key Pain Points

- I often end up creating non standard documents or recreating document templates
- There is no repository to share the latest / updated set of project templates or tools
- I need a forum to share and discuss best practices from past/similar projects
- I want to learn from the various projects we have completed in the past
- How do I onboard my new supplier PMs quickly?

What is this service?

- A repository of standard set of process guides, templates, examples/case studies and tools and techniques that are organized by lifecycle and knowledge areas and updated on a frequent basis
- A community of expert practitioners who can provide guidance as well as feedback to specific project issues and project documents as required
- Custodian of the project closure process and 'After Action Learning' (AAL) for all projects (includes analysis, continuous improvement and repository management)

How will this service help?

- Provides project managers with the latest guides, templates and tools and techniques to help them implement their projects
- Provides a repository of past / historic project documents that project managers can leverage for reference and planning (encourage reuse)
- Facilitates collaboration through a SME network and the help desk
- Will enable new Project Manager hires to quickly get oriented on the GBS ways of managing projects
- Provide a platform for all other services to be launched and maintained (single Point of Contact)

When will I use this service?

- I need to initiate a project especially as a new Project Manager hire
- I need to onboard a new supplier PM and the supplier team to my project
- I need reference documents / material on similar projects executed in the past
- I need expert feedback on my project documents and specific project issues
- I want to update the standard / recommended project templates and guides

1 Challenge(s) Addressed: Describes target customer challenges the service will address

4 Potential Uses: Outlines the different possible scenarios when the customer could use the service

Make no mistake, however: a Service Catalogue will be of no use if the mindset of the PMO is not one of a service provider. Before everything else, start there.

During our [APM Accredited PMO Practitioner course](#), we guide delegates through creating their own Service Catalogue for their PMO, in order that they can go back to their organisation with the confidence to be able to articulate what it is their PMO does for its internal Customers.

Figure 1 – Example of a Service in a Service Catalogue (source: CEB, A New Approach to PMO Value Delivery)

W. PMO ACADEMY

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Winter 2019

PMO Academy

Dedicated to the needs of PMO practitioners at every level, our exclusive **PMO Academy** delivers a pick and mix of learning opportunities. Globally, our groundbreaking core courses are the only PMO professional courses independently Accredited by APM, The Chartered Body for Project Management.

The **PMO Academy** supports your journey through the PMO career ladder which is aligned to the Wellington Competence Framework. It provides an opportunity to select training courses to get the most out of you and your PMO's development. Be inspired and create a practical toolbox to support your organisation. These courses can be delivered as live remote training for both public and client specific.

Core PMO Training Courses



PMO Practitioner

Designed for Practitioners of all levels who are delivering, managing, implementing or transforming a PMO. It will develop skills and help you to bring your unique & best-in-class PMO to the forefront of your organisation.

[Learn More](#)



PMO Leader

Designed for Practitioners of all levels who are delivering, managing, implementing or transforming a PMO. It will develop skills and help you to bring your unique & best-in-class PMO to the forefront of your organisation.

[Learn More](#)



Project Assurance Practitioner

Specialist course provides a comprehensive and practical view of the strategies, competencies required, and tools & techniques available to design, set up and deliver effective and integrated project assurance.

[Learn More](#)



Change Management Practitioner

This 2-day course has been designed to address the growing need for Project Managers, Programme Managers and PMO teams to bring change management principles and best practice to their delivery processes.

[Learn More](#)



Agile for PPM Professionals

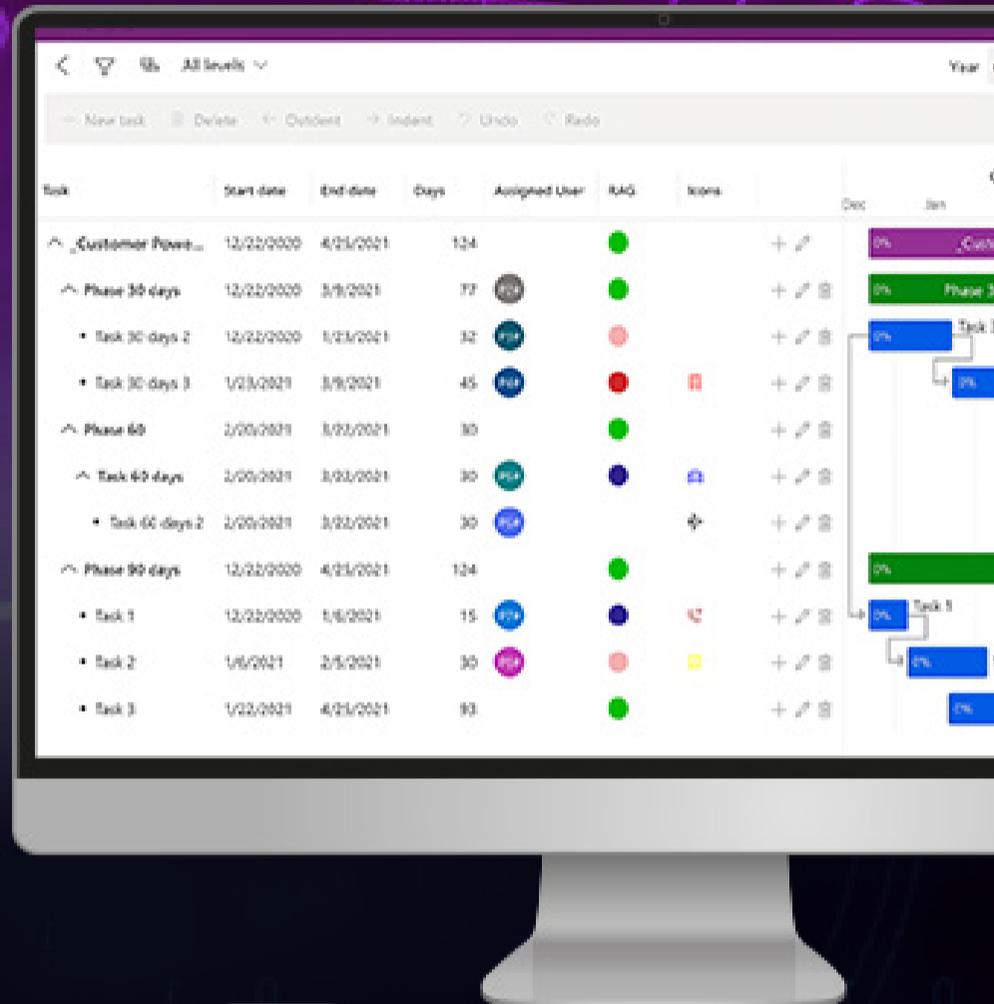
This 3-day course has been designed to address the growing need for Project Managers and PMO teams to understand best practice Agile and how this can be applied to their delivery processes.

[Learn More](#)

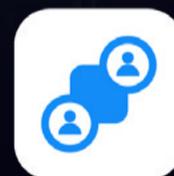
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Powered by  Microsoft

Power PPM can help PMO's to centralise ideation, project prioritisation, drive consistency in project management, governance and by providing real-time visibility across the portfolio enables informed decision making.



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team planner

Project Portfolio
Management

Resource Planning



time for teams



power hub



present it

Time Tracking

Trend Analysis

Status Reporting

Start Your Free Trial

Are you Agile or Just Not Planning?



Karin Maule

The word du jour in project management ‘agile’ is in stiff competition with the job title ‘Project Manager’ for misuse.

Has anyone come to you and announced they do not have any plans because they are running their project using agile methods? That should be an immediate red flag! It is common for “Agile” to be used as an excuse to not write anything down, agree on project goals, plan or use any project management basics, and “make it up as we go along” – but this is a misuse of the term “Agile”.

In this article, we will attempt to clarify a few misperceptions about using Agile to deliver projects.

Are you Agile or have you just stopped documenting your project?

In 2001 a group of programmers got together to create what became The Agile Manifesto. This (suitably short and concise) statement outlines the Agile principles:

It states:

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

| | | |
|------------------------------|------|-----------------------------|
| Individuals and interactions | over | Processes and tools |
| Working software | over | Comprehensive documentation |
| Customer collaboration | over | Contract negotiation |
| Responding to change | over | Following a plan |

That is, while there is value in the items on the right, we value the items on the left *more*.

2001

Not going over the top, gold-plating or producing waste is a key element of Agile so it makes sense that the Agile Manifesto is short and punchy, but perhaps the brevity has allowed for misinterpretations to creep in. The most notable is probably that the line

“We have come to value working software over comprehensive documentation”

Has come to mean “Agile projects do not have any documentation” to a lot of people. This is incorrect. The statement is that working software (or product/output) should be valued more than comprehensive documentation, not that there should be no documentation at all.

Different teams, different clients, and different projects have different needs for documentation, including where Agile is used. Agile offers an opportunity to break away from the traditional, document-heavy (and sometimes document-led) ways of managing projects and instead look at a way of letting interactions, collaboration, working product and flexibility drive progress.

Some Agile projects benefit from more documentation. Some traditional projects benefit from less documentation. No one (probably!) benefits from NO documentation.

Perhaps what we should aim for is to use the MVB, or Minimum Viable Bureaucracy – whatever that means for our given project and context.

Are you using Agile because it is right for your project or as an excuse to get out of planning?

To some, it might come as a surprise that it matters when we use Agile methods, i.e. what type of project work we apply it to. Not all projects are suitable for being delivered with Agile! In fact, one of the themes coming out of the Agile Principles is to not create waste by doing things “just because”, i.e. we should only do things that have a real purpose and that add true value. Therefore, using Agile methods without a good reason is therefore itself un-Agile.

If you have a specific scope that must be delivered ‘just so’ then a more traditional approach (with the relevant documentation and schedules) is more appropriate.

Are you using Agile methods properly or just not planning?

There are a number of different methodologies within the Agile family. What they have in common is that they focus less on detailed documentation and more on collaboration, exploration and adaptation. This often causes a misperception that Agile teams lack discipline, structure and just

eBook – Becoming More Agile



This eBook is going to focus on the Agile conundrum and specifically the impact the rise of Agile has had on organisations and PMO, detailing some of the technological innovations that can support PMOs and delivery teams to apply the right level of governance based on the need for agility within a project.

DOWNLOAD

So when should Agile methods be used? In the simplest explanation possible the projects that are suitable for Agile methods are those that involve brand new work where it is impossible, or undesirable to define the entire scope upfront, or where it is important that we get something (like an early version or a component of the whole solution) to the end-user as soon as possible. This is not an excuse for getting out of requirements management and scope definition. If your scope can be defined with reasonable confidence it should be. Agile methods are for those instances when the scope cannot be defined, or when there is so much uncertainty that a scope definition is pointless.

“make it up as they go along”.

Nothing could be further from the truth! In fact, in order to use Agile methods more planning, structure and discipline are needed than in traditional or “waterfall” projects.

Let me explain...

For Agile in a project context, the most common is Scrum. In Scrum, a dedicated team works together throughout the project. The project is split into chunks of time, typically called “Sprints”. A sprint should be 2-4 weeks long. No more, no less. The reason for this is that 2-4 weeks is enough (warning: if you say you are working in sprints but they are either longer than 4 weeks or have no

time limit at all you are in fact not doing sprints, you're just doing work in stages).

That means that every 2-4 weeks the team starts over:

- > They identify what requirements to work on
- > They plan how to deliver those requirements
- > They do that work
- > They close out that piece of work and evaluate how they worked and what they can do better

experimentation, adaption and collaboration.

As stated above Agile methods are best suited to work where the scope is not defined and that is because the true value of Agile is that it brings a structured way to experiment, learn and adapt to gradually uncover what the solution (and scope) should be. As the team works through its sprints and adapts their ways of working according to lessons learned in each sprint they will get better, more efficient and get better at understanding what is true value for the solution. This can only be achieved if the same people work together for a long period of time and therefore you need a dedicated team and not just a collection of professionals that dip in and out of the project.

APM Accredited Agile for PPM Professionals Training Course

This training course is perfect for those with a keen interest in understanding Agile ways of working and how to apply them to their day to day environment. Rather than focusing on one approach or technique, this course lifts the lid on "agile" providing a comprehensive explanation of best practices. Delivered in a truly innovative Agile method, delegates get to experience Agile for themselves, not just talk about it. This is the only APM Accredited Agile course worldwide and provides a comprehensive investigation of best practice.

LEARN MORE

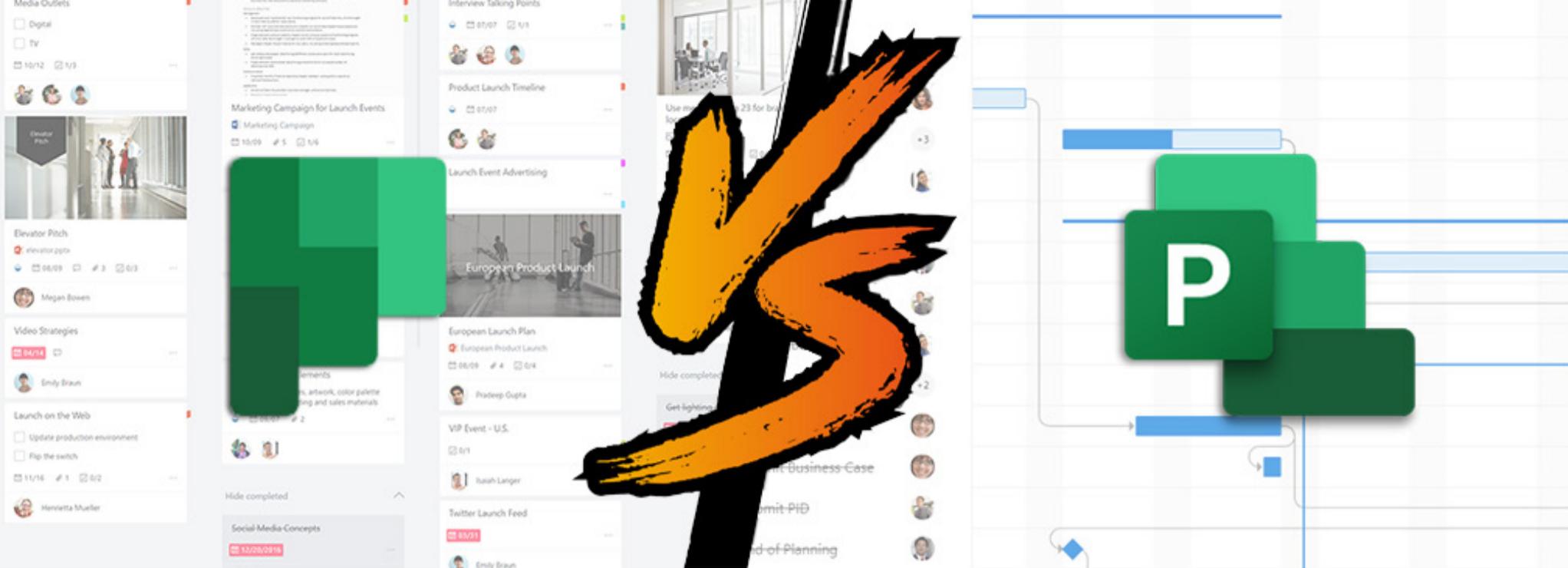
Each time the cycle starts over the team brings its lessons learned from the previous cycle to ensure they constantly learn and improve.

This means the team plans every 2-4 weeks, and they follow a very specific structure to make sure it works. This is why a team that uses Agile to deliver its projects requires even more discipline than one that uses traditional/ waterfall methods.

Is the team dedicated?

Woah, that seems like a loaded question, doesn't it? This is not a judgement on your peoples' work ethic, it is about their ability to focus on the solution and learn together through

- > Is the scope truly undefinable or likely to change significantly?
- > Are you working in clearly defined sprints?
- > Are you using the minimum amount of bureaucracy?
- > Do you plan at the start of each sprint?
- > Do you review your work at the end of each sprint to ensure you continue learning and improving?
- > Do you have a dedicated team?



Microsoft Planner vs Project for The Web



Baz Khinda

Microsoft Planner is the new Excel when it comes to managing project portfolios and that's not a good thing.

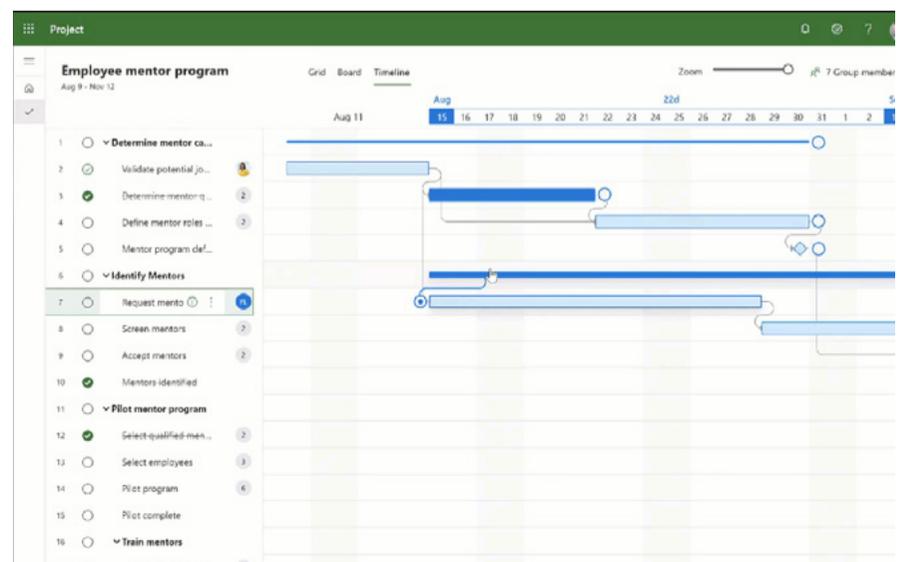
I've lost count of how many PMOs and other project delivery functions I've encountered that are using a complex array of spreadsheets held together with macros & duct tape to support project management, resource tracking and MUCH more. However, Excel hinders as much it helps alleviate project delivery and the same is true with [Microsoft Planner](#) – which, as a result of being available for free to anyone with a paid subscription to Office 365 (O365) is being used to try and manage entire organisation-wide project portfolios, when really, it's designed for lightweight task management in a team setting. So, in the same way, that I wouldn't advise anyone to climb Mount Everest whilst only wearing a pair of flip-flops and Speedos, I wouldn't advise any Project Practitioner/PMO function to use (or advocate) the use of Planner to manage complex projects.

I would instead recommend the ['new' Project from Microsoft](#) as an alternative (depending on your level of maturity). Yes, it's essentially a culmination of all of the most requested features that power users wanted to see introduced within Planner! So, here I present the top FIVE 'must have' features that the new Microsoft Project offers to users of Planner that are attempting to manage project portfolios.

Top FIVE Microsoft Project features YOU need to manage Projects

1) MORE Views (Grid, Board and Gantt Timeline)

I think we all agree that tasks boards are perfect for visualising a small number of tasks in a structured way through task cards & buckets, so you'll be thrilled to hear that Project does include what is essentially the 'same' Board view that you get within Planner! However, Project ALSO includes the TWO most user-requested Planner views, the Grid and Timeline (Gantt), and when combined, both views make it much easier to digest and visualise the project flow whilst seeing much more detail. One project, many views – pick your favourite!



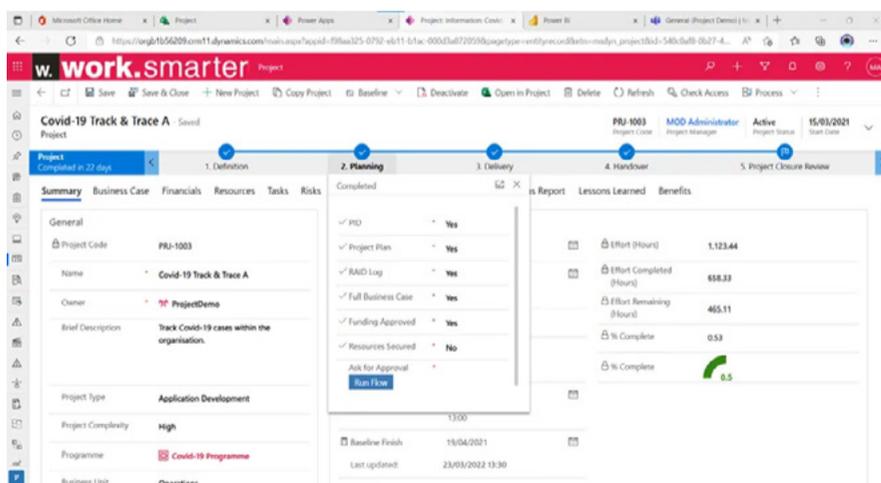
Microsoft Project for The Web

2) Project Task Dependencies

Tasks rarely sit in isolation; they tend to be interconnected and need to take place in a certain order. Think of them like a baton exchange, projects get completed by team members finishing their tasks before other team members dependent on those tasks can make a start on their work. So, it's clear that dependencies are an important aspect of project management, and it's for this reason that this was one of the most requested feature requests within Planner. Whilst 'dependencies' won't make an appearance in Planner, it is a standard feature within Project, which currently supports Finish to Start (FS) links with planned support for the other types Finish to finish (FF), Start to Start (SS) and Start to Finish (SF).

3) Extensibility with Power Apps

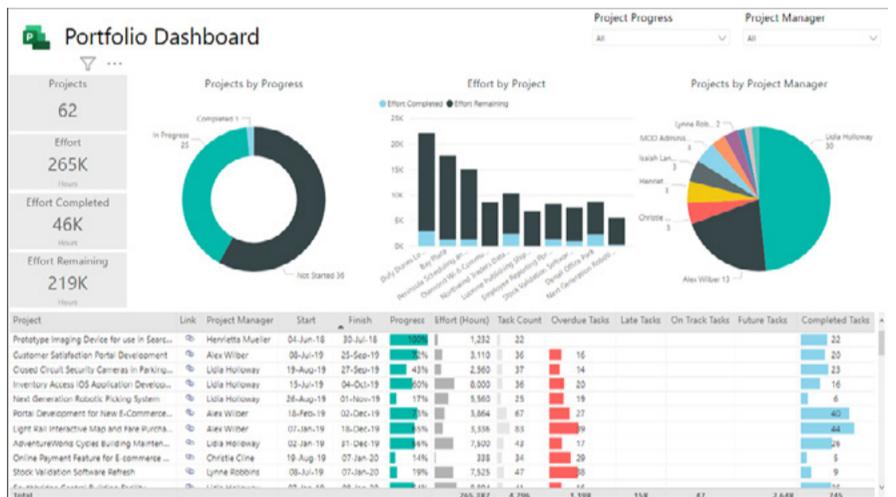
The new Project is designed to be extended through the Microsoft Power Platform, as outlined previously when I wrote about Project for the Web for Power Users. Users within PMO for example, often want to capture additional details around the projects, ranging from project descriptions, financials to RAID logs whilst also embedding lifecycle governance, these requirements are enabled through the Power Platform, specifically Power Apps and Power Automate. You can get a glimpse of our pre-built Project Accelerator+ Power App in this recent webinar and learn about extending Project for The Web with Power Apps through this article.



The Wellington Accelerator+ Power App for Microsoft Project for The Web

4) Automated Reports

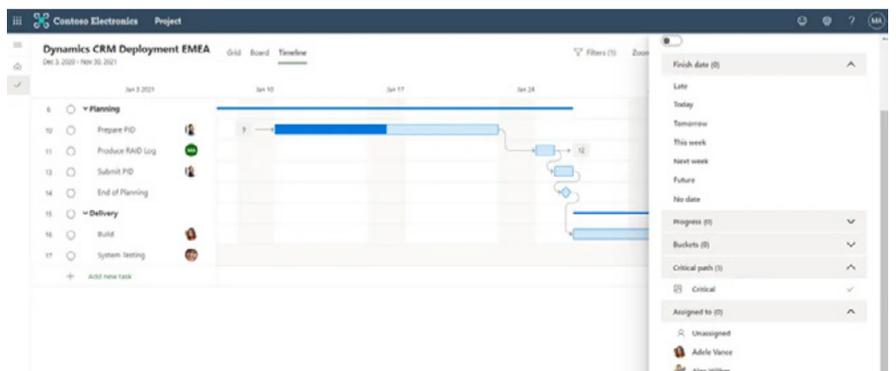
Within Planner you can access inbuilt charts, which is great for visualising the statuses of your plans, however, it doesn't allow for the pushing of data into Power BI and this was again a common request from users! The new Project provides a data feed to Power BI, meaning you're able to get access to supercharged insights and rolled up views from across your project portfolio(s), with the ability to even see your project data alongside data from other data sources i.e., forecast/planned costs from Project alongside actuals financial data from your ERP solution.



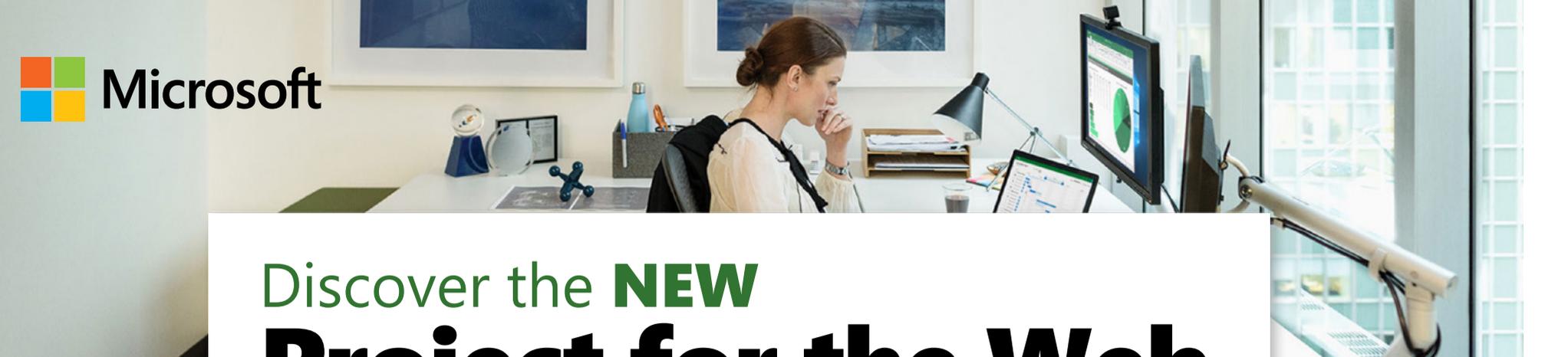
Microsoft Project for The Web & Power BI

5) Critical Path, Baselines and more

When working on a project, it's often crucial to see how various tasks impact the project finish date, to help with this Microsoft recently rolled out a 'critical path' view which is available within the Timeline (Gantt) view. Another feature that will be landing soon is the ability to 'baseline' your project, so when you're asked whether or not things are going according to plan, you'll be able to compare variances against the saved baseline (snapshot) natively within the schedule. This is something that the PMO would also be able to see through the associated reports and dashboards to identify projects that may need a helping hand.



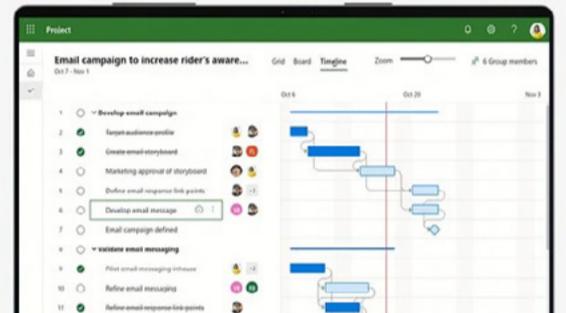
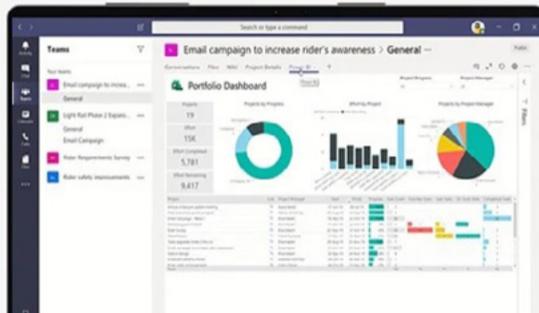
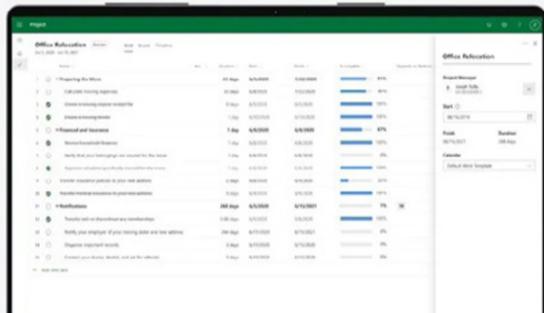
Microsoft Project for The Web – Critical Path



Discover the **NEW** **Project for the Web**

Microsoft Project for the Web (Project Plan 1) is the simple, powerful, reimagined Project for everyone. Manage projects, campaigns, product launches and much more.

This latest project management software solution is available now within Microsoft 365 and offers the same powerful scheduling engine as Microsoft Project through a powerful, easy-to-use browser based app.



Simple

Start quickly and work intuitively with an easy-to-use, coherent visual user experience shared across Microsoft 365.

Collaborative

Enable all team members to edit tasks simultaneously so you can get more done together, even when apart.

Intuitive

Enjoy rich connections with Microsoft 365*, Teams, OneDrive, and SharePoint that help you and your teams achieve more with a common set of familiar tools.

Features



Choose your view

Work with your team on the same project using the project view you prefer whether it's grid, board, or timeline.



See visualised timelines

Understand the relationships between tasks with help from highlighted task paths in a timeline view.



Simplify task scheduling

Use smart scheduling to easily organize tasks.



Collaborate & communicate easily

Use Project and Microsoft Teams to collaborate on projects, including file sharing, chats, meetings, and more.

Aviation industry partner propels global growth with Microsoft Project



CASE STUDY

Ontic is a leading provider of legacy aerospace products across commercial and military markets, supporting more than 5,000 customers worldwide. To meet customer demands and support its growth strategy, Ontic needed to raise the visibility of its global projects for adopting and transitioning products. It needed to better connect employees across teams and job roles to work collaboratively with a growth mindset.

To achieve its goals of improving product line transitions and better managing its internal initiatives, the company needed a project management solution to unite the organisation, promote transparency, and create business momentum. Ontic chose the Microsoft Project platform, within Office 365, using it to streamline the company's reporting, realise efficiency benefits, and manage and implement its transitions down to the smallest detail.

Overview

Customer

Ontic

Industry

Aviation

Country

United States

Products and Services

Microsoft Project Online
Microsoft Project for the Web
Power Apps
Power BI



A complex web

When a company maintains a portfolio of more than 6,500 products and 1 million component parts—and serves the highly safety-conscious aviation industry—it has to know exactly where things stand at all times. Ontic, an industry leader in supporting and sustaining legacy aviation products and platforms, maintains a wide range of aircraft technology and aims to extend the life of legacy aircraft.

Ontic's OEM partners include major companies like Honeywell, GE Aviation, Curtiss-Wright, Woodward, Moog, and Collins Aerospace, and it wants to continue to grow while still meeting its complex web of business, production, and safety requirements. So, the company used the **Microsoft Project & Portfolio Management platform** to build a fully integrated project management solution to streamline data tracking and boost the transparency and visibility of its projects.



"With Microsoft Project, we made it easier for PMO professionals and business managers to extract data, monitor project life cycles, and track results, which yields a more unified team focused on delivering results for the licensor, end customer, and broader Ontic team."

Chad Robson: Vice President of Strategy and Operational Optimisation, Ontic

PMO and beyond

In 2019, Ontic branched off from BBA Aviation and was purchased by CVC, a private equity firm, leaving Ontic without a formal project portfolio management solution across the business. Historically, it used Planview for managing projects. This web-based software lacked the customisation options Ontic needed, and it wasn't built to transition product lines. The company wanted a solution with fewer limits in terms of scheduling and interdependencies between tasks. Ideally, the solution would be flexible, easy to use, and interoperable with Ontic's data and other systems.

With an ever-increasing number of acquisitions and license transitions to manage and a focus on long-term growth, the company knew it needed to go beyond traditional project management software. In addition to compatibility with Ontic's current systems, the solution had to support better transitioning of legacy product lines from their original equipment manufacturers to support its customers worldwide. The company not only wanted to streamline the transition process but also to infuse efficiency throughout Ontic and its other projects and initiatives.

Ontic needed an out-of-the-box solution that it could also customise around its processes and goals. It wanted to create a standard process with

each transition, easily incorporate lessons learned, and demonstrate that to licensors. Ontic needed a fully integrated tool that it could use for managing resource capacity, finance tracking, and risks.

Some of Ontic's long-term growth goals are supported by initiatives run predominantly by non-project managers. The company needed a low-touch solution that would empower employees in various job roles to streamline data reporting and collaborate with the company at large. It wanted to better monitor day-to-day progress on these initiatives and create a structured process that involved simplified reporting and benefit tracking.

An intuitive, user-friendly solution

Ontic decision-makers selected the Microsoft Project solutions because they satisfied all the business requirements they had gathered. For help with the implementation, Ontic brought in Wellington, a project management consultancy and member of the Microsoft Partner Network with Gold competencies in Project and Portfolio Management.

Ontic first adopted [Project Online](#), the original Microsoft cloud service for project portfolio management, which is used to create a new product transition process, improving its strategy for moving equipment, technical data and



drawings, and customer and supplier innovation. To support the project management office (PMO) and non-project managers, Ontic subsequently worked with Wellington to deploy **Project for the web**, the latest Project offering for the cloud, built on **Microsoft Power Platform**.

Project for the web is now the backbone of Ontic's value creation plan—a long-term strategy for growth. With this service in place, Ontic professionals across the company can exercise more autonomy over initiative planning, including dynamic scheduling based on effort needed, project duration, and allotted team members. Whether teams are working on facility enhancements or improving time scales on other projects, non-project managers can add creativity into their strategy. But with a basic structure and governance in place, the broader company can see where those projects are in their life cycle.

"Project for the web is intuitive to use and incredibly user friendly," says Sean Thomas, Senior Project Manager at Ontic. "Using it, the initiative owners can focus on the delivery of the tasks rather than on the bureaucracy of managing system updates."

Integrated for the future

With its combined Project environment, Ontic promotes efficiency with web resource

management capabilities. The company uses **Power Apps** and **Power BI**, also built on Microsoft Power Platform, to make it easy for teams to automate data extraction and create interactive dashboards that viewers use to drill down to the details most relevant to them. Employees can see the original goal of any project and quickly determine the results to date. And with **Microsoft Teams**, Ontic's global teams have visibility into projects, strengthening collaboration and teamwork.

"Using Project for the web, we can just run some quick reports and click a few buttons, and we've got all of the data we need to quantify results quickly and easily to see if what we're working on is giving us the benefits that we're expecting," says Chad Robson, Vice President of Strategy and Operational Optimisation at Ontic. "We distribute monthly reports to local site leaders and our global leaders so we can keep everyone involved as we complete our projects."

Everyone onboard

With **Power Apps**, Ontic built a PMO portal to help with adoption—a one-stop-shop for everything related to Project. Portal users aggregate training information, news, and information on future updates to the tools. The portal not only provides resources to help non-project managers better understand the project management systems,





but it also promotes a new culture of organisation and structure within teams spread across seven facilities worldwide.

Project for the web offers a repository for employees, integrating systems across the company. And its appealing, intuitive interface entices people to want to use it, breaking down the first barrier to engage the tool. PMO employees make full use of the project management solution, and its use is also spreading across the organisation as more business units ask to adopt it too. Moving forward, Ontic intends to distribute Project for the web beyond the PMO to business units across the company to help them manage all types of functional responsibilities, while Ontic leadership promotes adoption and standardisation of all project management on Project for the web.

“With Project for the web, we all speak a common language and find data in exactly the same place across multiple projects,” says Thomas. “That facilitates problem solving and awareness from a coherence perspective within the PMO and the wider business. Having a central repository for our data enables our teams around the world to easily find common challenges and lessons learned from both past and open projects.”

Amplifying growth

Today, Ontic has a strong foundation in place for growth. The company is using both Project for the web and Project Online in a hybrid setup to improve its processes and better support the business. Through integration with Power BI and Power Apps, employees across the company now have clear visibility into initiatives and their progress, with teams easily creating shareable

dashboards on finances, risks, and project summaries. Having ready access to identify and extract project data means that teams spend less time on reporting and more time on meaningful work to advance the business with captured insights.

“With Project for the web, we could help Ontic build something that could track the overall aim of any activity and its expected benefit,” says Emma Arnaz-Pemberton, Director of Consulting Services at Wellington. “Teams can see if what they are investing in and working on is actually giving the benefits they were expecting. That’s a really hard thing to do—not just from an Ontic perspective but from an overall project management industry perspective.”

Ontic’s new product transition process has created such improved visibility into ongoing projects that project teams and leaders now collaborate regularly with the wider business, creating momentum for growth.

“Product line transitions are the bread and butter of what we do,” says Javier Hernandez, Director of Integration and Transformation at Ontic. “With the level of detail we can generate in Project Online and Project for the web, we’re more thorough than we ever have been, which sets us up for future success.”



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Emma Arnaz-Pemberton: Director of Consulting Services, Wellington

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