

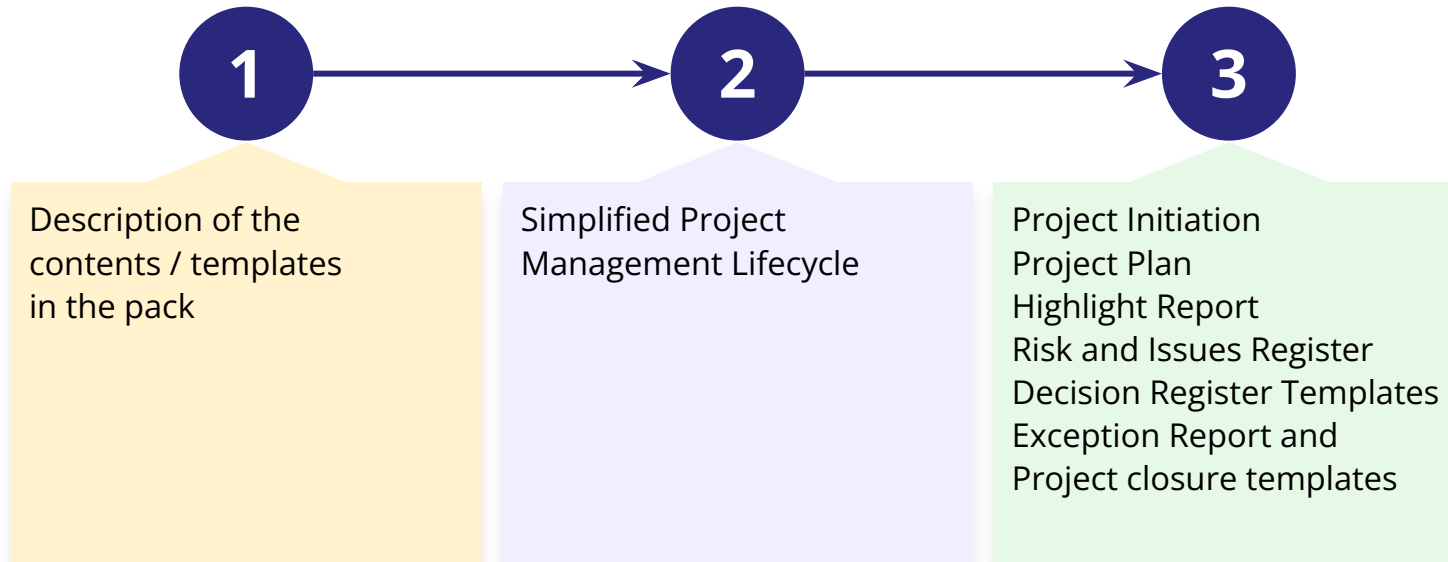


Presentation

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PMO Foundations Template Pack

This pack includes



Description of the contents in this pack

1. This pack is intended as a starter guide for organisations that are establishing or simplifying a PMO or Governance function within an ICT / Digital setting.
2. The contents are based on Prince2 project management principles, with a strong focus on capturing the most important information across the project lifecycle that will support informed, data driven project management, governance and decision making, at a base level.
3. This is intended for use as a starting point, for project management governance, that can organisations use in a **practical, simple way and can adapt this to their individual needs and operations.**

1. Starting a Project

Project management template	Purpose and application
1.1 Project assessment and approval	This is to support prioritisation, planning activities and support assessment of the project itself.
1.2 Project Initiation	When a new initiative is identified, used to capture enough information to understand the problem to be solved or opportunity to be gained through the delivery of the project; and how this translates to project scope and investment levels.
1.3 Project Plan	Describes the agreed delivery, management and governance environment for the project. The foundational elements captured, that describe what a project will achieve, how, with what resources, in what time, with what budget, how the project will be governed and directed, roles and responsibilities, end users, change and engagement that describe the project delivery environment through the lifecycle of the project.

1.1 Project Assessment / approval

Name of proposed initiative		
Business driver	<i>Enables achievement of strategic plan Is a treatment for a Risk Is required to maintain environment/operations Modernise systems</i>	
Why is this initiative important?		
Project benefit	What is the consequence to the business if this initiative is not completed?	
	Is this related to a strategic risk or operational risk?	
	What resources are required to deliver this? What is the investment required? (People, budget, time, in pace of another initiative).	
Project assessment	Is this more important than other initiatives that are already in progress? (I.e. work must stop)	
	What is the initial cost assessment (including resources/ vendors etc).	
	Does this need to be done for compliance? Describe.	
	Does this need to be done to achieve a goal in the strategic plan? Describe.	
	What is the key risk if this project is not delivered?	

1.2 Project Initiation

Name of initiative		
Business driver	<i>Enables achievement of strategic plan Is a treatment for a Risk Is required to maintain environment/operations Modernise systems</i>	
Describe how this will be achieved (Scope)		
Project benefit and investment	How will the project be delivered to achieve the scope?	
	What are the key milestones of the project?	
	What primary benefit will the project deliver and how will this be measured? What data will be used if a baseline measure is required? Who will measure this post project? Who will be responsible for realising the benefit at the end of the project?	
	Who would deliver this project? (Resources)	
	What is the initial cost assessment (including resources/ vendors etc).	
Resourcing, budget and Dependencies	Will this project delivery impact on any other initiatives either in progress or about the commence? Is this project, dependent on the delivery of any other initiative?	
	When does this project need to be completed by? Is this a discretionary timeline or a compliance / hard deadline?	
	What is the key risk if this project is not delivered?	

1.3 Project Plan

Name of initiative / project		Project Manager	
Project Board	<i>Project Executive, Senior User, Senior Supplier</i>		
Project Governance	<i>How often will the project board meet, what reports need to be provided to who and when.</i>		
Project Purpose / objective			
Key benefit	<i>What is the key project benefit and who will it provide a benefit for? How will this benefit be measured/ realised and by who and when?</i>		
Project Scope	In Scope		
	Out of Scope		
Project key milestones, quality, role and responsibilities	What is the project's overall schedule?		
	What are the key milestones of the project and the timeframes and due dates of each milestone?		
	What is the quality criteria (what must the project deliver in order to achieve its stated benefit?)		
	Project roles and responsibilities		
	Project Team members		
Budget, Risk and Tolerances	Project budget and allocation		
	Key Project Risks		
	Project Tolerances (degree to which the project board can approve exceptions without requiring additional approval outside of project).		
Engagement and change	Who will be affected by what will be delivered through this project?		
	How will they participate in the project?		

2. Delivering a project

Project management template	Purpose and application
2.1 Highlight Report	The recurrent report that the project team / manager provide to the project board or project governance function, during the course of the project lifecycle. This provides a snapshot of the key project status, highlights any risks and issues that are or will challenge successful delivery and the options for the project board / governance to address issues when escalated.
2.2 Risk Register	Captures the key risks that are identified to the successful delivery of the project. At a foundational level, this includes the risk, what it will cause / how it will impact on project delivery, and agreed activities that will be undertaken that will help reduce the risks.
2.3 Issues Register	The issues register captures problems that the project is facing (e.g. when a risk has eventuated or a roadblock to delivery has occurred). Issues management / resolution is recorded in this register.
2.4 Decision Register	Captures the key decisions that are made through the course of the project, to ensure transparency, accountability and clarity.
2.5 Exception Report	The report that is used to escalate an issue or problem to the project board/ governance function for decision. This is provided either in session (formal project board meetings) or out of session (between meetings) if urgent.

2.1 Highlight report

Name of initiative / project		Project Manager	
Project Board	<i>Project Executive, Senior User, Senior Supplier</i>		
Report period			
Project Purpose / objective			
Project status	<i>What is the overall health of the project - what confidence level do you have that the project is on track.</i>		
Key milestones	What has been delivered in this reporting period?	<i>Key activities that have been achieved in line with the project schedule</i>	
Budget	What is the overall project budget?	<i>Year to date or project lifecycle to date</i>	
	How much budget has been utilised and how much remains? How much will be spent in the next reporting period (forecast)	<i>What is forecast expenditure in the next project delivery/ reporting period?</i>	
Key risks and issues	Have the treatment activities identified for the key risks been effective?		
	Have any of the key risks turned into issues?		
	Are there any issues that the project board needs to address?		
Engagement and change	How have the end-users been engaged in this period?		

2.2 Project Risk Register

Name of initiative / project		Project Manager	
Project Board	<i>Project Executive, Senior User, Senior Supplier</i>		
Register current as at			

Risk #	Risk Description and impact	Risk exposure (what is the Risk profile VH, H, M, L)	Treatment strategies	Responsibilities for implementing treatment strategies
1	<i>Write as "If X happens then Y"</i>	<i>Use the organisational risk matrix to generate risk levels</i>	<i>Use "action type" (avoid/accept/etc) by "key action"</i>	<i>Role name (rather than person name or not division)</i>

2.3 Project Issues Register

Name of initiative / project		Project Manager	
Project Board	<i>Project Executive, Senior User, Senior Supplier</i>		
Register current as at			

Issue #	Issue Description	Impact and consequence	Corrective actions taken to address issue	Corrective actions further planned
1	<i>e.g. Operational resources will not be available during the unit testing phase</i>	<i>e.g. Additional project team resources will be required to complete the testing work.</i>	<i>e.g. De-prioritisation of project team other workload to free up capacity during testing period.</i>	<i>e.g. Stop work on all other activities during the three days prior to testing to ensure continued open capacity.</i>

2.4 Project Decision Register

Name of initiative / project		Project Manager	
Project Board	<i>Project Executive, Senior User, Senior Supplier</i>		
Register current as at			

Decision #	Date	Decision outcome	Reason for decision / informed by?	Consequent actions

2.5 Exception Report

Name of initiative / project		Project Manager	
Project Board	<i>Project Executive, Senior User, Senior Supplier</i>		
Report period			
Reason for exception report	<i>Why is this being escalated?</i>		
Project status	<i>What is the overall health of the project - what confidence level do you have that the project is on track.</i>		
Description of what is being escalated	Why is this being escalated?		
Project impact	What impact does this have on the project?		
	Has this already been identified as a risk or issue?		
Options and recommendations	What options are available to address this?		
	What is the recommended option and why?		
	Does this impact on any other projects?		
Decision required by and impact if not achieved.	What is the deadline for this decision and what is the impact if this deadline is not achieved?		

3. Closing a project

Project management template	Purpose and application
3.1 Benefits Realisation Plan	<p>This plan is developed by the project manager and team, in collaboration with the operational area, that will be responsible for ensuring the key project benefit is achieved. This plan is co-created as part of project delivery and is finalised during project closure. It includes key actions that need to be undertaken to achieve the intended project outcome. This can include activities such as the decommissioning of replaced systems, driving user adoption of a new application, discontinuance of a temporary workforce and/or commencement of a new business practice. The project benefits are aligned with the project's scope and objectives. While the project benefits are identified in the project initiation of the Starting a project phase, the benefit realisation plan documents the timeframes, responsibilities and activities required to achieve the full benefit of what the project is delivering.</p>
3.2 Project Closure Report	<p>The report that is completed by the project team, approved by the project board and then submitted to the division/ organisation's governance function. This describes the activities that have been undertaken to close down the project itself and assure ongoing successful system/ product management through appropriate engagement with operations teams.</p>

3.1 Benefits realisation plan

Name of initiative		
Business driver	<i>Enables achievement of strategic plan Is a treatment for a Risk Is required to maintain environment/operations Modernise systems</i>	
What is the scope of the project?		
Project benefits	Has the project scope changed since the project commenced? If yes, how?	
	Have the anticipated project benefits been preserved through project delivery? If not, what are the expected benefits?	
	What primary benefit will the project deliver?	
Benefits Realisation	What activities need to occur to achieve the project benefit?	
	When will these activities occur and by whom?	
	How will the benefit be measured and by whom? What data will be used?	
	How will achievement of the benefit be tracked and reported?	
	When will achievement of the benefit be reported?	

3.2 Project Closure Report

Name of initiative		Project Manager	
Business driver	<i>Enables achievement of strategic plan Is a treatment for a Risk Is required to maintain environment/operations Modernise systems</i>		
Project Board			
Project scope			
Project benefit and investment	What was the overall project budget? What was the end project position?		
	What primary benefit did the project deliver and how was it measured? What was the baseline?		
	What was the original project timeline? What was the delivered timeline?		
	Operationalization and benefits realization	What needs to happen in order to the benefit of the project to be fully realised?	<i>E.g. discontinuation of a resource for budgetary savings, complete decommission of replaced system</i>
Who is responsible for ensuring this is done and by when?			
Who will be maintaining the system / change in operations? Describe how this team has been involved in the project.			
Describe how this team has been prepared to manage operations.			
Have all project documents been submitted to the PMO?			



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