

**Building a Virtual SW Project Management Office:
What you can do when there is no support for a centralized PMO**
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Abstract

Virtual – being such in power, force, or effect, though not actually or expressly such. (2008 dictionary.reference.com)

In today's climate, it is not always obvious to management that they need a centralized project management office. It may be obvious but not geographically possible. One option is to go virtual. This paper will discuss how we built a viable, high-performing virtual Project Management Office. It starts with the history and leads in to how we do our work, tips to build a virtual PMO, lessons learned, and future direction for this particular virtual PMO.

Background

I returned from passing my PMP exam with a more critical eye to how we do business and how we can do better for the corporation. It became apparent that we had a gap in how we handled project management in our corporate group that could be filled with a project management office. The next step was to work up a proposal for my management – what I wanted to do, why and how. Be careful what you ask for. The plan was approved and I was asked to manage this new concept and virtual team. The beginning of this PMO was at a kick-off meeting to help with definition of what we wanted to become – what type of group, what type of service, and how we would manage ourselves.. This was our first ever face-to-face meeting and attracted eight SW Project and Program Managers. We named ourselves the Project and Release Management team. (SSG PRM)

We decided on a distributed virtual PMO out of necessity. We could not get management to buy into the idea of a centralized reporting structure. They liked the ideas that we were proposing, but the group was spread over several divisions and there were many uncertainties. The decision to be a virtual team led us to be more creative in how we formed and ran the PMO.

This PMO was formed in the Software and Solutions Group. We bounded our scope by defining our process, templates, and Best Known Methods (BKMs) to be limited to Commercial, Platform, and Enterprise software projects. Since this was a team that did not report to a centralized division, we knew that we would have to tailor our process and templates to meet the many needs. We also knew that the team would be made up of volunteers. It would not be mandatory that everyone doing SW Project or Program Management participate.

How we accomplish our work for our stakeholders & the team

A major benefit our stakeholders continually point to is that we provide consistent SW Project/Program Management (SW PM) methodology & templates. All participating project managers are trained on these methodologies and templates using a training checklist. (topics vary depending on division, type and size of project, and personal experience) The training has a dual purpose of also introducing the new PM to everyone around the world. Almost every member trains the new PM in one area or another. The consistency of methodology, templates and training allows the groups that participate to benefit from a common glossary, way of doing business, and understanding.

A byproduct of our Geo-diverse VPMO is that we provide almost 24/7 support for our project managers. It is a joke (although to be honest it is probably almost always true) that at any point of time on any day you can find one of the team online. This means that any project manager – or those who have questions for the project managers, can ask a question and expect a fairly quick response. No one has to struggle with a problem for days on end – they can instant message one person or e-mail the group. People contribute based on their experiences and abilities.

As the solitary SW Project or Program Manager on a team, it can be lonely. Having a centralized group allows us to gather, talk about project challenges and solutions, and celebrate accomplishments – big & small. Most of the engineers in our group may not realize how a carefully constructed risk management plan will help a project to achieve it's goals with less fuss. We share our accomplishments in an annual 'report of our projects' report so that others can learn more about our projects as well as BKMs that we are proud of.

A few items to watch out for as the team develops

The team grew from 8 to 17 people in 4 years. This included losing 5 PMs. As PMs came and left, it was important to find out not just why they came; but also why they left. Some leave for obvious reasons. (leaving the company, leaving the corporate group) Others leave for more complex reasons – but understanding those can help the group to be a stronger group long term.

It is important to watch out for those who cost more than the benefit they provide. These are people who come in, take the training, use the templates, but do not contribute back at all. These are people who should have access to all materials, but not the valuable time of the core team or the manager. Early on, a “Cost of Admission” was created to ensure that those who wanted to join were joining for the right reasons. It became very important to enforce the cost – to ensure that both sides benefit from this relationship.

Active detractors are those who have decided for any of a myriad of reasons that they do not like the virtual PMO. This could be real or perceived offenses. It is important to listen candidly and not respond right away – but root cause and resolve. Some of these active detractors can be your best salespeople – once they understand the value of the team. Some you will never win over and you need to decide quickly if they are worth the effort of winning. Some of these detractors can be the management of project managers who want to be in the group. If that is the case, you must work to win them over – using data, outside experts, the person’s career development plan, or any other method you can use as justification. If the PMs direct manager is not supportive of them being in the virtual PMO, life becomes quickly difficult for the PM

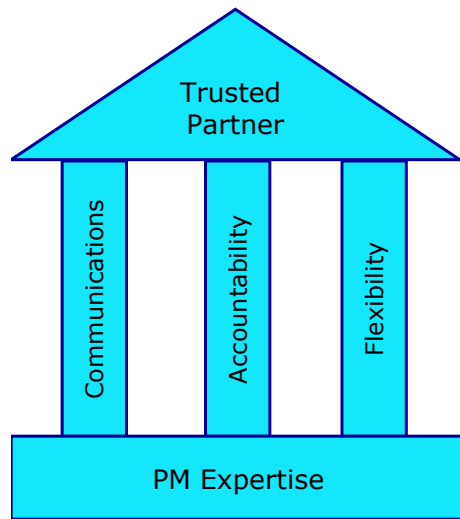
What our team looks like today

Today our virtual PMO has 17 SW project and program managers in 4 countries. (9 different sites in total) In addition, there are those who observe and those who are actively learning. The active learners will one day join the PMO. The observers are managers or those who do some project management, but are not interested in the career – just what they can learn. We take on anyone who is doing SW Project or Program Management – as long as they and their manager both agree to the Cost of Admission.

Each country has it’s own virtual PMO team lead. It is important to have 1 person in each country who is keeping an eye on the team members and can report to the manager any local issues or challenges. These team leads also organize local PM training opportunities, coordinate attendance at PMI gatherings, co-ordinate after-work social time, lunches, regular meetings, or local working sessions to solve PM challenges.

We created pillars for our team – those values that we want everyone to assign to our team. (Think brand) We call it our house. We support our roof (being a trusted partner) with our foundation & pillars. We came up with the following diagram to explain.

SSG PRM -- Building a Trusted Partnership



Who We Are

SSG PRM is your trusted partner in delivering project success

Our Strengths and Values

- **We are Flexible:** Assisting teams with a variety of SDLCs, and tailoring the PLC and our SLA based on individual project culture and need
- **We are Accountable:** We reward and recognize excellence, we are proactive, we monitor programs and PRMs, we formalize our SLAs
- **We Communicate:** Clear and easy to find PM Info - Intelpedia, SharePoint, Risk Portal, consistent dashboards, indicators, reports

Our Foundation

- Skilled Project Management Professionals
- Collaborative Leaders
- Training, Mentoring, and Career Pipeline

The positive results in forming taskforces around the pillars are that the PMs got to know each other better. Working on a project with a sub-set of the team proved for some to be very rewarding. However, the time differences between the various team members caused one pillar to fail to deliver. We lost 2 strong pillar captains and that in turn reduced the pillar team effectiveness. The pillars are still viewed as correct and useful. The question is around how we create sub-teams to ensure that we have methods, templates, and training to support our brand.

Opportunities for growth within the PMO

There are many side benefits of the virtual PMO. The pillar activity is a smaller project that the SWPMs can directly influence. As such, they can work on and demonstrate skills that might not be possible in their normal team environment. There are leadership positions in each pillar – a chance for someone to provide vision/strategy and drive tasks to completion. There are the geographic team leads which allow individuals to practice forming teams and creating a group out of people who work in different organizations.

There are so many people with so many different backgrounds that there are many opportunities to learn and to teach. Each new PM has a main mentor & topic area experts that they work with. Once a new PM becomes part of the team, they are asked to give back – either through helping with templates, (creating, updating, or reviewing) training, (creating, updating, or delivering) or through one of the leadership roles. All of this helps the PM to solidify their knowledge and share with the PM community within the PMO.

PMs can become experts in many areas – planning, stakeholder management, requirements, change management, scope management, post project review facilitation, risk management, SW development life cycles, and more. This allows the team to be perceived as a corporate resource and adds to the annual ‘brag sheet’ for the PM. They can mentor, provide presentations, or act as a consultant to a new team. We offer consultancy to non participating teams once on any topic – after that, they need to provide a SWPM to be trained (trained as part of the PMO?).

Finally, the SWPMs are able to network within the group and within the corporation. They get to meet others who are doing project and program management, gain visibility with senior management, and build a worldwide network.

Important Lessons learned

After 4 years, there are many lessons learned. If I were to do this again, I would consider the following 7 items when forming a virtual team.

1. Build Trust

- It is important to build trust with the PMs, their management, and key stakeholders. In our case, the stakeholders are the General Managers – very senior at our company. These 3 groups of people need to understand what they can expect & get what has been promised. People will quickly forget small

problems, but trust is very hard to earn back. This trust is what allows the manager to ask people who do not report directly to do work for the PMO & know that it will be done.

- Determine (or Identify) the WiiFM. (What's in it For Me) Once people understand the give/gets they are more apt to participate if they see the benefit. The Cost of Admission, (what we expect from the PMs & their manager, what we give to the PMs) the vision, and the regular check-in with the stakeholders all helps you to understand and confirm the WiiFM.
- Set expectations. It is important to let people know if their expectations will not be met and why. This helps you to define the scope of what you will be responsible for and what you will complete.
- Set up a cost of admission. A volunteer organization takes more effort than you initially expect. Make sure that the Cost of Admission is beneficial to all sides – the virtual PMO, the PM, and the PM's manager. Our cost of admission includes expectations of meetings to attend, how they can participate, and what they will get out of the PMO.
- Have fun. If you get to know the PMs and they get to know each other, trust is built. One of the best ways to get to know the team is through fun team-building exercise – F2F or virtual. We have tried a myriad of team building exercises as well as some experiments on how to have fun the rest of the year.

Trust is built in many ways – Understanding the WiiFM, expectations, getting agreement to the Cost of Admission & having fun are all part of this. It is a tricky balance but very rewarding when you have a team that trusts each other and the PMO manager.

2. Gain high level support

- It is important to have sponsors and allies. Allies help the team in small and large ways – from supporting the annual F2F meeting to speaking out for the team in any meetings when the subject of the PMO comes up. Sponsors can help by directing PMs to the PMO as well as encouraging all projects to have a PM. It is important to set expectations appropriately. In the first 3 years, I checked in with the Sponsors every 6 months. The managers were all on a regular cycle depending on what kind of help they asked for. As the PMO became more mature, the regular check-ins became less frequent. It is still important to keep your sponsors current on your progress as you never know when you will need their support.

3. Have a vision – even if it is not the right one

- The first vision we had was long and rambling. However, it was a vision that the team crafted together and one that we could agree to and gather around. Later, we came up with the vision “Efficient and effective SW Program Management in SSG“. This was simple & explained succinctly what we were trying to do. The vision becomes a rallying point for the team members – something for them to point their managers to when everyone is trying to understand the purpose of this new creature – a virtual PMO.

4. Communication

- As the manager, communication became my full-time job. It is important to be available to answer questions, talk about the PMO or the PMs, discuss what we are doing and why, and any assortment of tasks. Listening is critical, as is being able to quickly explain what we are doing. You are communicating with the PMs, their managers, stakeholders, allies, and detractors. (remember WiiFM?) We created a team vision, logo, brand, and templates that demonstrated our brand. All of these are overt forms of communication. The time spent talking with management, engineers, and potential PMs are also communication. Communication will be varied & frequent when setting up and managing a virtual PMO.

5. Team Building in a virtual world

- Once a virtual team is identified, the joys of team building start. We have an annual F2F. The first morning is spent in a team-building activity. We have done a Strengths Finder exercise, Meyers Briggs, some ‘learn about others’ and some ‘form small teams and accomplish’ exercises. On the last day of the F2F, we go some place fun. We have gone on a river cruise, played “Bunko Bowling”, (extra points given for filling out the networking section of the scorecard) family yard games, and more. This allows us to build strong relationships quickly that will help us get through the next year. We have a weekly meeting which allows us to talk about subjects that we care about. There are task forces for people to work together on small projects. Sharing of humor and personal pictures (new baby, new house, new pet) are all encouraged. Anything we can think of to keep the connections alive is appreciated.

6. Build competence

- A team is only as strong as the weakest link. Unfortunately, this is very true in a virtual P MO when people's impression of the entire group can hinge on a single individual. It is very important to assess skills, help with training, contribute to the development plan, and get everyone to an expert level in at

least one area, competent in PM, and functional in their technical area. One reputation we fortunately have is as the “local” experts in PM areas – whether the local area is China, Russia, Argentina, or the US.

7. Be patient but persistent

- A virtual PMO is not built in one year. As can be seen in the slide below, it took many years for us to gain competency. We are still not perfect in the foundation areas, but we are much stronger there than in the top areas. It may take some time to win a detractor over, but patience pays off. You never know how a bad situation can turn into an opportunity. We unfortunately lost one of our members in a fatal car crash. 2 of the PMs stepped in to cover that person’s job. The comment from the stakeholder was “We know that your team was mourning. We were mourning. Yet the schedule did not slip & the planning was only delayed by 2 weeks. We plan on hiring someone new, how can we get them to be part of a team that cares this much?”
- Be persistent. People will dismiss this idea – but if the idea is built on a perceived need, hard work, and competent PMs it can continue to grow. Remember that most sales people wait until someone says “No” at least 3 times. If someone says no, that is an opportunity to ask ‘can you explain to me why you’ve said no’. That gives you an idea of what they are thinking & allows you to figure out if/how you can win them over.

Building SSG PRM and a Culture of Success



Where we are headed

Our current vision is to provide “Efficient and Effective SW Program Management in SSG”. Our brand view is to “Be a trusted partner in delivering project success”. We have an annual F2F meeting in July & continue to add PMs and techniques to our library.

We continue to work on a volunteer basis. We do not actively recruit anymore, but people come to find us. Sometimes they are referred to us by Sponsors or Allies. Sometimes, they have heard about us from other PMs. We even hear from teams outside of our corporate group looking for training on how we have solved a particular problem. We continue to support each other and look forward to the next stage of this virtual PMO’s existence.

Summary

Looking back, I would have to say that what worked well in setting up the virtual PMO was defining a concise Cost of Admission and getting buy-in from the PM and their manager before we would take them on. This helps to set expectations and establishes a relationship of trust. Understanding the WifM of the General Managers was critical. Once they were satisfied that we were accomplishing what we wanted, they felt comfortable asking teams to work with us. The training program is key to our success. Each new PM feels supported, is trained, and can then participate in the PMO – understanding the language, methodology, and BKMs. This also sets up a comfort level for them to ask questions of anyone at any point in time.

What could have gone better would have been having high level sponsorship and a better way to manage volunteer contributions. The team is regularly fighting with mid-level management for existence. The high level sponsors like what the team does, but have never staffed any support or PM tools. This means that on an irregular basis, there is a need to justify existence to some mid-level management group. Another challenge is how to manage volunteer contributions. Helping the virtual PMO out comes just above free time in a personal priority. Some PMs are able to manage their time to regularly contribute. Other PMs enjoy procrastination and often the PMO tasks fall off of their list.

All in all, the Virtual PMO is a success. It was created in the summer of 2005. It continues going strong today. There are 17 members worldwide and there is a sizeable library of materials for PMs and potential PMs to access.

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