

**pm-partners**

# Career focus: How to put your best foot forward

A guide to project, programme and change management, with insight into Agile learning pathways, and career options for business analysts.



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## INTRODUCTION

# The future of project delivery is now

**It is fast moving and competitive, but it's equally rewarding.**

When the global pandemic hit in 2020, project professionals were forced to pivot, rethink, and adapt to survive. While some organisations took a moment to assess their portfolio investments, others seized the opportunity to [shift their focus to being more agile](#).

With so much disruption and uncertainty, where does this leave the industry? How do young professionals, graduates, and newcomers enter into the field? And how do our seasoned project and programme managers excel in a world gone agile?

If you are unsure about what to do next, you're not alone. Join us as we unravel the evolution of project delivery, from waterfall to [global best practice framework PRINCE2®](#), to agile delivery methods and more. This guide is designed to help professionals decide which project management course, agile training, or other certification to consider in 2022.



**Jourdan Clark**

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### ABOUT THE AUTHOR

Jourdan is always up to date with the latest in global best practice standards and certifications. Working with product, project, programme and portfolio managers, as well as change managers and business analysts, she is adept at aligning her customer's aspirations with the optimum training programme for their needs. Whether their journey involves progressing from project manager to head of PMO, or supporting their organisation's transition to Agile product delivery, Jourdan is the person to speak with.

# PART 01

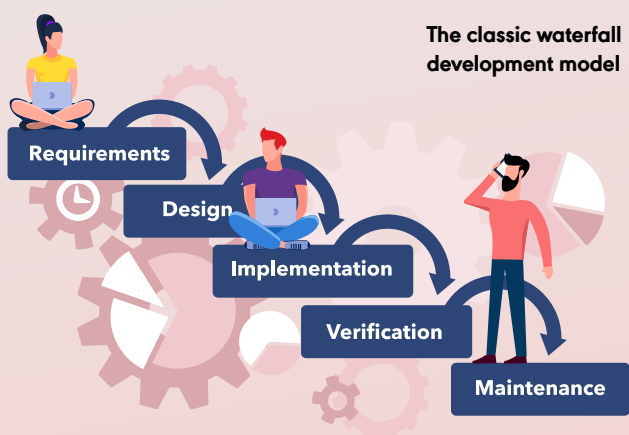
## Project management: from humble beginnings

When you think about the pyramids in Egypt it is easy to believe that project management has been around for millennia. After all, a project is simply a set of collective actions that has a start, a middle and an end, and is designed to deliver an output. So one could argue that the Egyptians were actually running a programme, but that's a conversation for another time. Let's fast-forward from ancient Egypt to the '70s, as this is when project management courses, methods and techniques really began to take form.

### Waterfall project delivery

First introduced as a method for software development, the term 'waterfall' became part of the project manager's vernacular in the 70s. Essentially, it's a traditional step-by-step approach to product development in which phases follow each other rigidly, with distinct goals for each phase of development.

After one phase of development has been completed, the development proceeds to the next phase and earlier phases are not revisited (hence the analogy that water flowing down a mountain cannot go back).



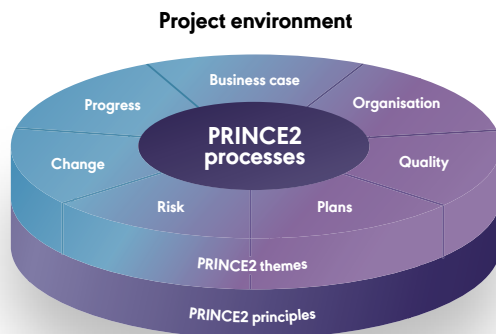
With waterfall, the emphasis is on upfront planning with the aim of gathering all requirements at the start of a project. Change is tightly controlled, and the value gained from the project is primarily delivered towards the end or after the project closes.

The term waterfall is often used interchangeably with the term 'traditional', in some cases to imply that this style of development is 'old' or 'outdated'. But while waterfall does get more than its fair share of bad press, particularly with the rise of agile ways of working, it remains a tried and tested approach. Waterfall works extremely well in a predictable environment, for instance, in repetitive projects where procedures are already clearly defined, like construction.

### PRINCE2 global best practice

Currently regarded as the world's most practiced project management method, PRINCE2 was actually born from a private sector framework called PROMPT (Project Resource Organisation Management Planning Technique). Picked up by the UK government in the 80s to make IT projects more manageable, PROMPT was later adapted and given the acronym PRINCE, or PRojects IN Controlled Environments.

The new and improved PRINCE2 methodology arrived on the scene in 1996 after extensive expert consultation. Unlike its parent model, PRINCE2 was a generic project management method that was both robust and flexible and could be applied to any project regardless of type, sector or industry.



Over the years, PRINCE2 has developed a common international language for project management, with [certifications \(from AXELOS\)](#) held and used in 220 countries. Offering a structured approach and clearly defined principles, themes and processes, it has become a proven way of enabling successful projects from IT and product development to marketing and business transformations. But, the true power of PRINCE2 lies in tailoring the method to suit the specific project environment and the size, complexity and risk of the project.

**FUN FACT**



The PRINCE2 certification course has remained in PM-Partners' top 3 most popular project management courses for over a decade.



## Myth vs. reality

While waterfall and PRINCE2 are sometimes grouped together in the same 'traditional' bucket, it's important to point out that the two are distinctly different.

PRINCE2 is a project management method (and certification) providing a proven framework and principles for enabling successful project delivery, whereas waterfall is a structured development approach.

PRINCE2 likes structure and it can be used in a waterfall way, just as agile ways can be blended with PRINCE2 (see PRINCE2 Agile® later), but it has never been a waterfall model and there is nothing in PRINCE2 which dictates a waterfall approach.

## PART 02

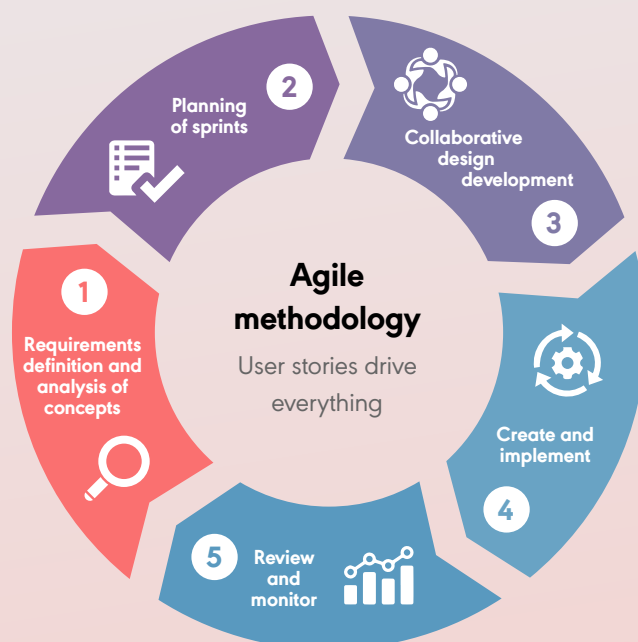
# Project management meets Agile

At the beginning of the twenty first century things were moving at lightning speed. The world was super charged with connectivity; we found Facebook, the iPod, and we learned to purchase online with Amazon. The rate of change had accelerated – customers wanted products and services faster, better, and more conveniently. Looking back, the time was clearly ripe for Agile to emerge.

### The Agile methodology

The word agile is from the Latin word: to do. It embodies the concept of quickness, lightness and ease of movement. Born out of the desire to make software development more responsive to business needs, the Agile Manifesto was a pivotal point in the Agile movement on its release in 2001. Two decades later, and you can safely say that it would be difficult to find a project professional without some element of 'Agile' experience on their resume.

But like all things project management, it's not quite as clear cut as that. There are multiple [Agile pathways](#) that one might choose and multiple definitions of what it means to take an Agile approach. In fact, Agile purists may even say that there is no project management in Agile, but this is not quite true.



- 1 Analysis of concepts and requirements definitions; determine current state and your expectations.
- 2 Arrange teams and tools needed to optimise production.
- 3 From the beginning of the process, the end users' involvement and feedback is critical.
- 4 Frequent development delivery through sprints. Feedback on testing & appropriate changes are imperative.
- 5 Ensure that you are reviewing and monitoring key metrics for success.

[Agile Project Management \(AgilePM®\)](#) has been around [as a framework and certification](#) since 2010 and is designed specifically to help project managers within any industry or sector run projects in an agile way. Widely seen as a moderate form of Agile, it offers structure and a higher level of managerial control than some of the other Agile frameworks, with a focus on setting up teams for success, while also encouraging flexibility and autonomy.

For organisations requiring standards, rigour and visibility around project management, AgilePM provides the ability to marry this with the faster pace of change and empowerment that is integral to Agile.

Like PRINCE2, AgilePM can be used across all types of projects, but where PRINCE2 focuses on project management only, AgilePM addresses both the project management component and Agile project delivery, similarly to waterfall project delivery.

## When PRINCE2 becomes Agile

One option for organisations with a strong history in waterfall that believe an 'all-in-Agile' approach may not fit across their organisation, is PRINCE2 Agile – a project management course offering a blend of both worlds.

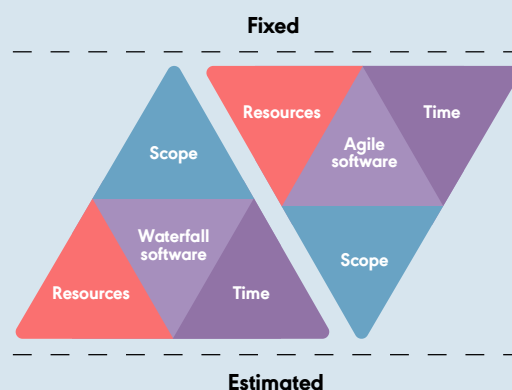
[AXELOS released PRINCE2 Agile in 2015](#) to provide guidance on how to apply Agile approaches – and the flexibility and responsiveness they offer – within the established governance framework of PRINCE2. Separately, they have their own strengths, but when blended they offer the potential for a more holistic approach. [View the PRINCE2 Agile course outline here.](#)

PRINCE2 Agile is the only Agile project solution encompassing the full spectrum of Agile methods and frameworks. In effect, PRINCE2 Agile is agnostic; it does not favour one agile way over another. Practitioners can engage with Agile in all forms from Adaptive Software Development (ASD) to eXtreme Programming (XP) and everything in between.

With interest mostly to those who have Agile experience and are looking to adopt an industry standard in project management, PRINCE2 Agile is also gaining favour among 'traditionalists' looking to understand Agile delivery methods, including how they can be utilised and how a project manager can collaborate with people in Agile roles.

### TIP: How to spot the difference in project delivery methods

Scope expectation is a simple way to explain to stakeholders and product owners that there is a fundamental difference between waterfall and Agile. In waterfall, scope is fixed and protected. If you want more or less then you use a change request. In Agile, scope is agreed by prioritisation at a high level and can change through iterative sprints. The methodologies differ and you must change your mindset to deliver in either way.



## PART 03

# Agile outside of project management

We've learned that the Agile methodology can be applied to project management, but if being an Agile project manager is not right for you then you are probably going to be more interested in part three. Here we discuss roles within Agile delivery teams, and we review Agile frameworks, including the Scaled Agile Framework® (SAFe®)

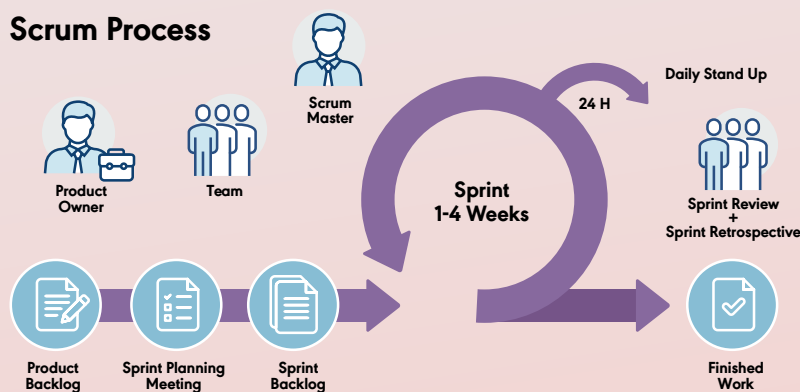
### 1. Agile Delivery: the Scrum master and Scrum product owner

[Scrum is a popular way of applying the Agile methodology](#) to everyday processes, particularly when developing and sustaining complex products. Created by Schwaber and Sutherland (c. 1995), the framework offers a collection of roles, events, artifacts and rules, providing a way to assess the efficiency of practices so that you can improve. Scrum was formulated as a faster, more flexible means of delivering the greatest value in the least amount of time.

Instead of a project manager, it's typically the Scrum master ([SMC™ course](#)) and Scrum product owner ([SPOC™ course](#)) who are responsible for guiding and

empowering a Scrum team. Both roles require a different skill set and have different attributes to a project manager and their own distinct set of accountabilities. As a quick rule of thumb, the key differences are as follows:

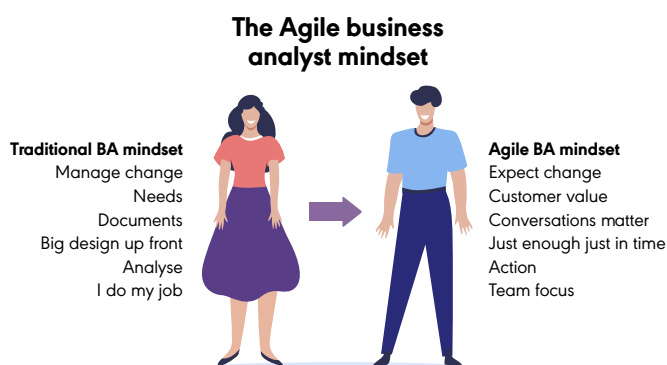
- » Project managers are focused on delivering outputs within the constraints of time, cost and scope
- » The Scrum master is a servant leader and takes on more of a facilitative role in the creation of the project's deliverables
- » The Scrum product owner is responsible for maximising business value for the project and acts as the voice of the customer





## 2. Business functions: when the business analyst goes Agile

The business analyst (BA) is a critical role within any project environment, including Agile. Business strategy execution depends upon developing and implementing solutions that provide demonstrable value to an organisation. Optimal value, however, can only be realised when solutions are based on precise requirements that fully address an issue or opportunity within the context of the 'whole organisation and environment'.



[Traditional BAs are aligned with A Guide to the Business Analysis Body of Knowledge® \(BABOK® Guide\)](#), current research, and best practice industry standards. In contrast, an Agile BA will be versed more around the organisation's adoption of Agile approaches. BAs performing an Agile role need to have the necessary skills and expertise to provide value to the project outputs.

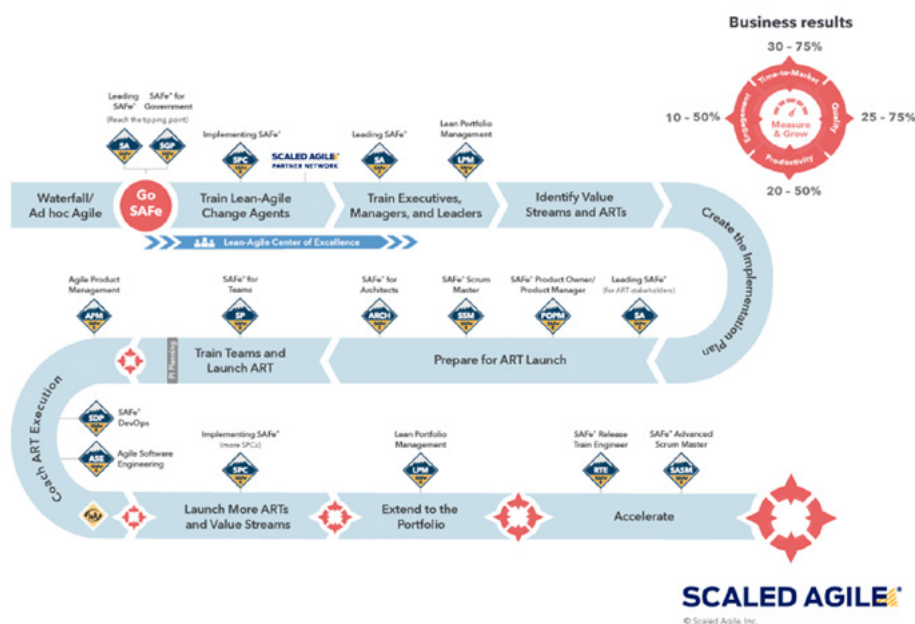
## 3. Agile frameworks

There are a few enterprise agility options which have a proven track record for success – Scaled Agile Framework® (SAFe®), Large-Scale Scrum (LeSS), and Disciplined Agile Delivery (DaD). Below we discuss SAFe in more detail.

**Scaled Agile Framework (SAFe)** is an approach to implementing Agile into daily operations; promoting alignment, collaboration, and delivery across large numbers of Agile teams, applying a Lean approach to product development and systems thinking.

The word 'scale' is used when speaking about the Scaled Agile Framework (SAFe) as it was designed to support organisational growth by scaling with a structured approach. There are four configurations in SAFe to accommodate the various levels of scale: Essential SAFe, Large Solution SAFe, Portfolio SAFe, and Full SAFe.

If you are a mid-level Agilist (or of equal experience within an Agile environment) looking to develop your career within an agile world, then this is a good one to include in your tool kit. Leading SAFe® is about how to lead a Lean-Agile enterprise by leveraging the Scaled Agile Framework (SAFe) and its underlying principles. Courses cover topics like how to build and support Agile teams and programmes, empower a Lean portfolio, build a continuous delivery pipeline and DevOps culture, and how to coordinate large solutions. [Formalising your skills with a Leading SAFe certification will grant you a SAFe Agilist \(SA\) title.](#)



## PART 04

# Programme management delivering organisational change

For those more seasoned professionals, you may have already earned your stripes within the industry as a senior project or programme manager. Perhaps you were working within an organisation that embarked on an Agile transformation and now you're a seasoned Agilist. Either way, you've made it this far so kudos to you!

But what's next? You can't simply stand still.

Just like any organisation, you must prepare for change in order to remain competitive and stay in business. After all, you are your own success story.



### Customer story

Listen to Dominic Cain speak about how he went from being a young chef to a programme director.

### Programme management and change management training

Programme management is a vital component in the delivery of strategic business initiatives and change. Delivering the right benefits and outcomes from change requires a structured framework to coordinate, communicate, align, manage and control the activities involved.

Programme management provides this framework through organisation, processes, inputs, outputs and a focus on strategic thinking. Here are three options to consider if you're looking to advance (or formalise) your

programme management, or change management career by gaining certification.

### Global best practice standards for programme managers:

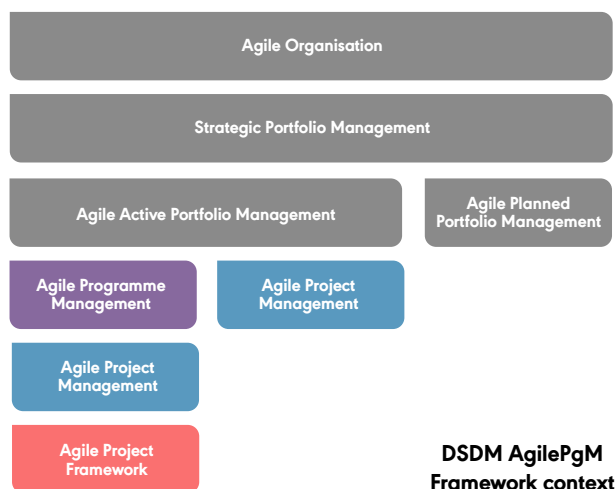
**Managing Successful Programmes (MSP®)** represents proven good practice in the delivery of transformational change through the application of programme management. In today's climate of constant and rapid change, organisations have learned how to transform themselves through effective leadership and strategic control and by doing so they are more likely to survive and prosper.

The [MSP® 5th edition course](#) offers an established best practice programme management framework, designed to align programmes and projects to organisational strategy and enable enterprise agility, focussing on the delivery of outcomes of benefit, while mitigating risk and actively engaging stakeholders.



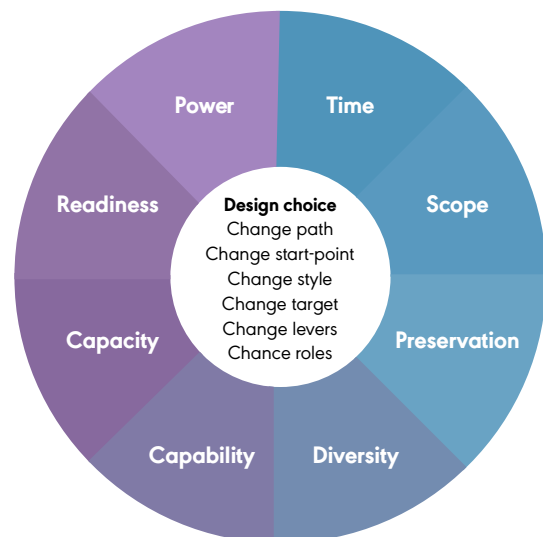
The [Agile Programme Management \(AgilePgM®\) course](#) was developed in partnership with the Agile Business Consortium. AgilePgM® teaches participants a disciplined but flexible Agile approach to the management of transformational change in organisations, allowing for iterative and incremental delivery of outputs and benefits.

The governance model contained within the guidance enables professionals to play a crucial role in ensuring a programme captures its vision, whilst empowering teams to work without undue interference. Built on firm foundations, the programme can evolve and react to business change in our increasingly dynamic world.



## Change Management Body of Knowledge (CMBok).

One of the challenges facing organisations today is how to modify the business through regular change initiatives, with minimum disruption and maximum gain. The [Change Management Foundation to Practitioner course](#) is the definitive certification for professionals dealing with organisational change, transition and transformation. The course is based on The Effective Change Manager's Handbook.



Research suggests that 70 per cent of projects fail to secure their anticipated benefits because organisations install new systems, processes or practices, but are unable to implement the change fully: people are not sufficiently equipped for, or committed to, the new ways of working to sustain them. This demonstrates an obvious need for professionals to supplement traditional project and business management skills with skills in change leadership.

## PART 05

# Arrive at your destination – delivering successful outcomes

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So how does all of this information help professionals decide what they should do next? Which project management courses, or Agile methods are the right ones to learn. Let's recap to see if we can identify a pattern forming:

- 1 Change is constant and continuous. What's more, it is running at high speed.
- 2 Traditional project delivery is still used today because it is proven to work.
- 3 The Agile methodology continues to evolve with new roles and opportunities.
- 4 Global best practice standards, such as PRINCE2, can work in harmony with Agile for a structured approach to product and project delivery.
- 5 Programmes are increasingly made up of both traditional and Agile projects.

Given all this, we know that today's delivery environments are multi-modal (or hybrid). We also know that the industry is moving at an unprecedented pace. So when we consider the future of project delivery, it's safe to say

that it's no longer a case of traditional versus Agile, or which single method or framework to endorse. Likewise, your career options are no longer so linear – there are multiple pathways to choose from.

While we can't tell you which pathway to take (at least not in this eBook), what we can say is if you really want to accelerate your career and excel at delivery, then our advice is to gain cross-functional skills.

### What do we mean by cross-functional skills?

If you're an Agile professional take a Project Management Fundamentals course, or learn about PRINCE2. Equally, if you are part of a traditional or PRINCE2 team, take the time to learn Agile; understand the foundations with a course like Agile Fundamentals, or AgilePM. Knowing and understanding how to do both will only boost your ability to deliver better outcomes, and potentially outperform your peers, getting you closer to achieving your professional goals.





**BONUS PACK**  
**All the goodies we promised**



# Can PRINCE2® be Agile?

PRINCE2 and Agile: which of these two popular project management approaches is right for your project? Or should you blend the traditional with the agile mindset and use them together? Let's take a look at the top 7 strengths, differences and synergies.



## PRINCE2 and Agile differences

The significant difference between PRINCE2 and Agile approaches can be summarised as: PRINCE2 focuses on project direction and project management. Agile has a strong focus on product delivery but relatively little on project direction and project management.

When blended they offer the potential for a more holistic approach, covering the management and delivery of a project with the option to execute using agile techniques.

## 7 PRINCE2 Agile synergies

**Team structures for product delivery**  
Integrating Agile's solution development team enables projects to be run in a more agile way.

**Apply facilitation**  
Facilitated workshops are a powerful tool that can be used throughout the project lifecycle - including planning, design, quality reviews, project reviews to lessons learned.

**Alignment of decision-making roles**  
Executive = Business Sponsor,  
Senior User = Business Visionary, Senior Supplier = Technical Co-ordinator

**Apply MoSCoW**  
By prioritising needs, focus is maintained on what really is important to the business.

**Introduce iteration**  
The approach moves from the traditional predictive culture to a convergent one. Iteration promotes investigation and clarification.

**Scope tolerance**  
As opposed to standard PRINCE2 cost, time and quality tolerance, Agile is being responsive to the features being delivered.

**Timebox**  
The PRINCE2 process of managing product delivery and the use of work packages synergises with the Agile timeboxing/sprint technique.



# The PRINCE2 Agile® Foundation Examination



Multiple Choice - Examination Duration: 60 minutes

## INSTRUCTIONS

1. You should attempt all 50 questions. Each question is worth one mark.
2. There is only one correct answer per question.
3. You need to answer 28 questions correctly to pass the exam.
4. Mark your answers on the answer sheet provided. Use a pencil (NOT pen).
5. You have 60 minutes to complete this exam.
6. This is a 'closed book' exam. No material other than the exam paper is allowed.

### 1 Which is a PRINCE2 principle?

- A. Focus on the business need
- B. Limit work in progress
- C. Start with what you do now
- D. Focus on products

### 2 Which is a purpose of the risk theme?

- A. To establish mechanisms to control unacceptable deviations from a plan
- B. To identify, assess and control problems that have occurred
- C. To improve the ability of the project to succeed by controlling uncertainty
- D. To establish mechanisms to monitor the project's continued viability

### 3 Which is a purpose of the 'managing a stage boundary' process?

- A. To provide a fixed point to confirm acceptance of the project product
- B. To authorize the project manager to proceed to the next management stage
- C. To control the link between the project manager and the team manager(s)
- D. To provide the project board with information to assess ongoing viability

### 4 What is the project product description used for during the 'closing a project' process?

- 1. To validate that acceptance criteria have been achieved.
  - 2. To check that the project has delivered what is expected.
  - 3. To identify lessons learned throughout the project delivery.
  - 4. To validate any benefits that have been realized so far.
- 
- A. 1 and 2
  - B. 2 and 3
  - C. 3 and 4
  - D. 1 and 4

**5 Which responsibilities are specifically assigned to the team manager?**

1. Ensuring that the required products are produced appropriately.
2. Delivering products within the time, cost and quality tolerances.
3. Representing the interests of those using the project's products.
4. Being accountable for the technical integrity of the whole project.

- A. 1 and 2
- B. 2 and 3
- C. 3 and 4
- D. 1 and 4

**6 Which is a typical characteristic of project work?**

- A. It utilizes an established team
- B. It has a degree of uncertainty
- C. It has no end date for the work
- D. It mostly involves repeatable routine tasks

**7 Which statement describes the Scrum approach?**

- A. It addresses complex adaptive systems, while productively and creatively delivering products of the highest possible value
- B. It is a defined set of criteria that is used to determine if a piece of work or collection of work items is completed
- C. It is a version of the final product which allows the maximum amount of validated learning with the least effort
- D. It is a framework which restricts the amount of work in progress in a particular part of the system at any one time using a pull system

Correct answers: 1 D, 2 C, 3 D, 4 A, 5 A, 6 B, 7 A



# The AgilePM® Foundation Examination



Multiple Choice - Examination Duration: 40 minutes

## INSTRUCTIONS

1. All 50 questions should be attempted.
2. All answers are to be marked on the answer grid provided.
3. Please use a pencil and NOT ink to mark your answers in the Answer Booklet provided.
4. There is only one correct answer per question.
5. You have 40 minutes for this paper.
6. You must get 25 or more correct to pass

### 1 Which of the following is NOT stated as a benefit of using DSDM?

- A. User training becomes unnecessary
- B. The business is more likely to feel ownership of the solution as it evolves
- C. Deployment is more likely to go smoothly, due to the co-operation of all parties
- D. The risk of building the wrong solution is greatly reduced

### 2 Which statement relates to the DSDM view on formality?

- A. The aim is to remove all formality, so that the team can get on with building the solution
- B. Agile must be informal, otherwise it stops being fun
- C. It is entirely formal, to enable management and control
- D. The DSDM process should be configured with an appropriate level of formality

### 3 Which roles form part of the Solution Development Team?

- A. Solution Developer, Business Analyst, Technical Coordinator
- B. Solution Developer, Business Analyst, Business Ambassador
- C. Technical Coordinator, Business Visionary, Business Sponsor
- D. Technical Coordinator, Business Visionary, Business Analyst

### 4 What role is responsible for ensuring that the solution delivered will enable the benefits described in the Business Case to be achieved?

- A. Business Advisor
- B. Business Analyst
- C. Business Sponsor
- D. Business Visionary

### 5 In a DSDM project, what does the 'W' in 'MoSCoW' stand for?

- A. Want this
- B. Won't have this time
- C. Would have
- D. Wish list

**6 In a structured Timebox when does the Solution Development Team seek to understand the Timebox objectives and accept them as realistic?**

- A. Investigation
- B. Kick-Off
- C. Consolidation
- D. Refinement

**7 Which of the following statements about DSDM are true?**

- 1. May be used to supplement an existing in-house Agile approach
- 2. Deals with the development and delivery of a product rather than the full project
- 3. Works alongside existing standards and approaches
- 4. Suited to the development of new solutions and enhancing existing solutions

- A. 1, 2, 3
- B. 2, 3, 4
- C. 1, 3, 4
- D. 1, 2, 4

# The PRINCE2® Foundation Examination



Multiple Choice - Examination Duration: 60 minutes

## INSTRUCTIONS

1. You should attempt all 60 questions. Each question is worth one mark.
2. There is only one correct answer per question.
3. You need to answer 33 questions correctly to pass the exam.
4. Mark your answers on the answer sheet provided. Use a pencil (NOT pen).
5. You have 1 hour to complete this exam..
6. This is a 'closed book' exam. No material other than the exam paper is allowed.

### 1 What is the first step in the recommended risk management procedure?

- A. Assess
- B. Identify
- C. Implement
- D. Plan

### 2 Which statements about a project's stakeholders are CORRECT?

1. A stakeholder is anyone who thinks they will be affected by a project
  2. Stakeholders require equal amounts of engagement by the project management team.
  3. Stakeholders remain unchanged throughout the project.
  4. A stakeholder may be internal or external to the corporate organisation
- A. 1 and 2
  - B. 2 and 3
  - C. 3 and 4
  - D. 1 and 4

### 3 Identify the missing word in the following sentence.

A purpose of the [ ? ] theme is to control any unacceptable deviations from the project's objectives.

- A. Change
- B. Plans
- C. Progress
- D. Risk

### 4 Which is a minimum requirement for applying the organisation theme?

- A. To define the project assurance role of team managers
- B. To combine roles, where possible, to simplify the organisation
- C. To appoint a business change manager as senior user when the project is part of a programme
- D. To define the approach to engaging with stakeholders

**5 What is defined when deciding how to tailor PRINCE2 to suit the project?**

- A. When the project's progress will be reviewed
- B. Which of the six tolerance areas will be included
- C. Which primary stakeholder interests will be represented
- D. When the project's outputs will be delivered

**6 Which statement about the 'continued business justification' principle is CORRECT?**

- A. The justification for compulsory projects does not need approval
- B. There must be no change to the reasons for a project
- C. A formal business case document is mandatory
- D. The chosen option must provide value for money

**7 Which regular report provides the project board with a summary of stage status?**

- A. Lessons report
- B. Product status account
- C. Highlight report
- D. Checkpoint report

## **Need help deciding which course to take? Try our quiz**

In less than two minutes, we  
will help you on your way.

**START QUIZ**



# 20 steps to writing a winning business case

To give your initiative the best chance of approval, tick off the following items as you prepare, write and get ready to submit your business case:



## Before writing a business case

1. Are you clear who your audience is? (When preparing your business case you need to address the reviewer's perspective.)
2. Have you defined the business problem or opportunity that the business case hopes to address?
3. Can you identify the drivers for change e.g. changing market dynamics, compliance regulations?
4. Is there a strong link between the proposed initiative and the organisation's strategic objectives?
5. Have all stakeholders relevant to writing the business case been identified?
6. Do you understand what key metrics the decision-makers are looking for when they review business cases?
7. Are there any formal business case approval processes and/or project selection and evaluation criteria that you need to take into account?

## When writing a business case

8. Have you defined the value of the initiative to your organisation based on financial and non-financial benefits?
9. Are all stated outcomes and benefits measurable and are those measures included?
10. Are the costs, including one-off project costs and on-going operational costs, adequately detailed and verified?
11. Have you presented the assumptions on which your costs and benefits are based?
12. Is there a clearly articulated and documented justification for the recommended option, supported by facts and evidence?
13. Has the viability of realistic alternative options been examined?
14. Have major risks been called out and quantified, including the impacts of not investing (the 'do-nothing' option)?
15. Is it clear what the proposed project will deliver (inclusions) and have you set expectations around what will not be delivered (exclusions)?
16. Have you outlined the implementation approach for the proposal, including key project phases, milestones and resource requirements?

## Before submitting a business case

17. Have you captured all related opportunities or problems that could be addressed by this potential project?
18. Have you kept, cleaned and maintained all data used to calculate costs and benefits for future audit purposes?
19. Are you clear on whose approval is required for this business case and by which date and are they listed in the sign-off section?
20. Have you included all necessary attachments, for example cost-benefit analysis, risk log, high-level schedule, resource plan?

**It can take a significant amount of time to prepare a compelling, well-supported business case, but it's well worth the effort. Presenting a thorough justification for why a project should proceed gives your initiative the best chance of approval and ensures decisions are being made in the best interests of your organisation.**

To learn more, book our one-day [Developing an Effective Business Case](#) course, and for tips you can action right now don't miss [6 tips for building a winning business case](#). You can also call one of our professional development consultants on 1300 70 13 14 to discuss your training needs in more detail.

# Checklist for a successful PMO

Three in five organisations now use a centralised project management office to co-ordinate their projects, and with the increasing influence of the PMO on the organisation, setting up a PMO for success is essential. Here's our comprehensive 5-point checklist to establish a high-performing PMO.



## 1. The PMO's role

A project management office with a well-defined, visible role in the organisation's projects is more likely to succeed than one without a set purpose.

### Consider your PMO's role in relation to:

- » Benefits realisation
- » Compliance
- » Governance
- » Knowledge management
- » Organisational strategy
- » Project administration
- » Project performance tracking
- » Resource management



## 2. Stakeholders

Setting up a project management office within an organisation requires stakeholder engagement, buy-in and management. From there it is essential to build rapport and trust for the best chance of success.

### Consider these segments:

- » Organisational leadership
- » The PMO's sponsors
- » The PMO team
- » Direct stakeholders
- » Indirect stakeholders
- » Key influencers in the organisation



## 3. Structure

Once you have established the project management office's responsibilities and stakeholders, draw up an organisational structure to show where the PMO sits. When setting up a PMO, this will help to define roles and responsibilities for resourcing and reporting purposes.

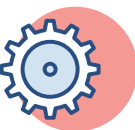


## 4. Value

Outputs, outcomes and benefits will depend on the remit of your project management office according to its role set out at the beginning.

### Consider the following types of value a PMO may offer:

- » Increase in benefits realisation
- » Improved risk management
- » Clearer project reporting
- » Better resource management
- » Development of a Centre of Excellence
- » Closer strategic alignment to the organisation
- » More support for projects and project teams
- » Higher rate of successful projects delivered
- » Better decision-making, including selection of projects
- » Improved ability to lead organisational change
- » Fewer mistakes, including mitigation of threats
- » Enhanced ability to take advantage of opportunities



## 5. Operation

After defining the role of the project management office, you will need to clarify the tools and processes you intend to use to perform these activities. These may be a replication of project tools already available in your organisation, or you may require new ones.

### Consider:

- » Planning, including portfolio management
- » Budget estimation and tracking
- » Risk management
- » Resource management, including personnel
- » Managing interdependencies
- » Scheduling and delivery tracking
- » Change control
- » Procurement
- » Project reporting
- » Quality assurance and compliance
- » Benefits management, realisation and tracking

# Answer the following key questions:

## The PMO's role

1. Why does the organisation need a PMO?

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2. Where will the PMO sit in the organisation?

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3. What responsibilities will the PMO have?

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4. What activities will the PMO be expected to undertake?

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5. Does my PMO need a charter?

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## Stakeholders

1. How can the PMO best communicate its purpose, responsibilities and activities to each segment of stakeholders?

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2. How can the PMO invite, collate, evaluate and act on feedback from stakeholders?

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3. Who has the power to affect the success of the PMO?

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4. What information does the PMO require from each of these segments going forward?

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5. What is the best method to facilitate ongoing communication with each set of stakeholders?

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## Structure

1. Which areas does the PMO control?

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2. Who/which departments report to the PMO?

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3. Who/which departments does the PMO report to?

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4. Where is there overlap?

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5. How might this affect resourcing, including funding and staffing?

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## Value

1. What metrics are needed to discern the tangible value of a PMO?

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2. What feedback is required to demonstrate the intangible value of a PMO?

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3. What is the best method to communicate the PMO's value to the organisation?

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**pm-**  
**partners**

The project management office has a key role to play in the ongoing success of an organisation, both strategically and at a project level. Using this checklist to make these considerations before setting up a PMO will give your organisation the best chance to thrive.

Find out more about how to run a successful project management office [by contacting the experts at PM-Partners](#) or call us on 1300 70 13 14 today.



# CONTACT

## About PM-Partners

From waterfall to Agile, projects to products, PMOs to Lean Portfolio Management, and business analysis to change, our expert team helps to deliver your outcomes more effectively, through advice, delivery teams, and upskilling your people to deliver better.

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