CASE STUDY

Project Management

Management asked SATOV to manage the PMO

The business was facing significant headwinds marked by slowing R&D innovation, internal HR issues, and a drop in profitability

Management had undertaken a turnaround initiative to reset the business trajectory

Critical stakeholders were managing multiple important initiatives

The large, complex project work-load was posing a challenge when combined with the day-to-day operation of the business

Several significant projects were at early stages of development with planning, financial analysis and ultimate approvals still pending

The client engaged us to manage the PMO to help ensure timely and effective implementation

- Finalize outstanding business cases and plans
- Develop a consolidated timeline accounting for priorities, constraints and interdependencies
- Help project leaders manage to project plans

Our main task was to help project leaders succeed

Project planning

- Assist in developing and evaluating business scenarios
- Provide project management tools and expertise
- Provide guidance in development of project mandates and plans

Process discipline

- Monitor project progress against closely defined milestones and timelines
- Assist project leads in identifying and working around road blocks
- Provide analytical support as required
- Help escalate issues to the Steering Committee as required

Project coordination

- Help develop inputs to approve, prioritize and sequence projects based on financial returns, interdependencies, resource needs, etc.
- Establish uniform reporting structure across all projects
- Monitor the health of the overall program to help management adjust effort and decision making

We were able to prioritize the projects at hand, make critical decisions and finalize project plans

We identified 7 of the 24 projects as priority

We made critical decisions on high impact projects

- We decided to move the [Country A] HQ to a new building that could handle the European consolidation and e-commerce initiatives

- We decided to shut down the [Country B] office and service the market from the [Country C] office

- We decided to close the [Country D] office and fulfill the vacant engineering positions in [Country E]; decided against a move to [Country F]

We finalized the road map for the other 4 projects and created concrete timelines

Example projects

Project #1

Consolidating all European offices in Germany except the office in Italy

Project #2

Investigating different scenarios to determine the most profitable structure for operations in Japan

Project #3

Investigating different scenarios to determine the ideal structure for the R&D department

Establishing clear roles and accountabilities was critical

RACI Codes		
Role	**Individual**	**Description**
Responsible (R)	"The doer"	Individual(s) who will perform tasks required to complete the milestone Responsible for the action and/or implementation The degree of responsibility is defined by the person accountable
Accountable (A)	"The buck stops here"	The individual who is ultimately accountable Only one "A" can be assigned to a milestone Accountability should be assigned to the lowest possible level
Consulted (C)	Must be consulted	Individual(s) who should be consulted when making critical decisions Individual who should provide input
Informed (I)	Must be informed	Individual(s) who should be informed about decisions and/or activities Individuals who's input is not required

We mapped resource requirements to identify areas needing additional support

Resource	20-Jan	27-Jan	3-Feb	10-Feb	17-Feb	24-Feb	3-Mar	10-Mar	17-Mar	24-Mar	31-Mar	7-Apr	14-Apr	21-Apr	28-Apr
N															
N		1		1	1	1	1	2							
N															
K	2	2	2	2											
IT		2	2	2	2	2	2	2	2	2	2	2	2	2	2
J	1	1	7	7	9	6	5	4	5	3	5	6	4	4	2
C				1	1										
S				1	1	1	1	1	1	1	1	1	1	1	1
B	1	1	8	8	10	10	8	5	5	3	5	7	7	8	4
D															
D			3	3	2	1									
R		5	6	6	5	4	4	2	3	3	5	8	7	5	3
F		1	1	1	1										
F		1	1	1	1										
G	1	2	1	1	1	3	3	3	4	4	2	2	2	3	4
H														1	1
J		6	6	6	6	4	5	2	2	2	3	1	1	2	2
J		1	1	1	1										
S		1	1	1	1										
T															
V		3	3	3	3	3	3								
S		5	5	5	5										
C			2	2	2	2	2								
P	2	1								1	1	1			
S								1	1	1			1	1	1	1
J								1	1	1	1	1			
S				1	1	1	1	1							
J			2	2	3	2	2	5	5	5	5	1	1	1	1
D	1	1													
J					1										

We instituted a weekly PMO process

Monday	Tuesday	Wednesday	Thursday	Friday
• Follow-up on action items	**1 PM** **Project Status Updates Due** Project Leads send weekly status update to PMO **PMO tasks:** • Review status updates/timelines • Review last week's meeting minutes/action items • Make notes to prep for project update meetings on any outstanding items/questions	**PMO updates** 20 minutes per project. Timing of meetings for each lead will be determined after kick-off **PMO tasks: in meeting** • Each Project Lead presents status update to the PMO • PMO works with Leads to eliminate issues, remove barriers, etc… • PMO reviews notes to follow-up on any outstanding items **PMO tasks: post meeting** • Send out meeting minutes • Provide guidance to project leads	**8:30 AM** **PMO Internal Status Meeting** PMO team works through issues, chooses items to escalate to Steering Committee **PMO tasks:** • Update SteerCo deck and e-mail to SteerCo before update on meeting days **Steering Committee Update** (biweekly – timing TBD) Steering Committee receives update from PMO and resolves escalated issues **PMO tasks:** • Send out meeting minutes to SC	• Follow-up on action items

We developed templates to help project leaders guide their workstreams

Project:		Overall Team Status	Updated On:	November 18, 2016
Leads:		On track		

Overall status determined as per the status update convention. Most recent update included for coordination

Milestones & Activities Update

#	M / A	Description	Responsible	Status	Target Date
1	Milestone			Complete	11/17
2	Activity			Complete	11/3

Milestones are identifiable when complete and tied to a specific date; progress measured against original milestone date

Risks/ Issues

#	Description	Impact	Mitigation Options	Responsible	Status	Target Date
1		Medium			On track	12/7
2		Low			New	01/7

Risks and issues are identified along with possible impacts and mitigation options

Decisions required / Interdependency

#	Decision / Interdependency	Description	Responsible	Target Date
1				

Any decisions / interdependencies that may prevent progress are flagged, with a responsibilities and a timeline

Project issues and decisions logs kept timelines on track

Issues log

Date issue identified

#	Description	Project	Open date	Urgency	Mitigation	Responsible	Target date
2	Legal entity closure delayed	X	18-Feb	Medium	Followed up with legal team, should be resolved next week	Joe	23-Feb

Typically more detail than on the project page

Suggested methods to resolve or suggested resolution

Responsible for ensuring issue is resolved

Decisions log

#	Description	Project	Considerations	Responsible	Target date
1	Select new distributor	Y	Knowledge of the local market. Ability to maintain dealer relationships	PMO	29-Jan

Typically more detail than on the project page

Relevant considerations to make the decision

Responsible for ensuring issue is resolved