

# Project Management Roles & Responsibilities



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# Project People

## The Solution That Works

by J. Kent Crawford and Jeannette Cabanis-Brewin

Let's be frank: Better project management is carried out by better project personnel. Period. Most of the reasons technology projects fail are management-related rather than technical, yet many enterprises have no processes in place to ensure that project managers are appropriately trained and evaluated. Best practices for preventing project failure often include changes in the management of project personnel. Competent and experienced project managers are not accidental: they are grown in an environment that trains, mentors, and rewards them based on performance on projects.

Benefits of having a good project manager include reduced project expense, higher morale, and quicker time to market. The skills most executives cite as desirable in a project manager are: technology and business knowledge, negotiation, good communications (including writing ability), organization; diplomacy and time management. Understanding the business is more important than understanding technology. They must be able to define requirements, estimate resources and schedule their delivery, budget and manage costs, motivate teams, resolve conflicts, negotiate external resources, manage contracts, assess and reduce risks, and adhere to a standard methodology and quality processes. Obviously, there is a growing body of knowledge about who makes the best project manager, how to develop their skills, and what kinds of rewards motivate them. After years of development, that body of knowledge finally has an organizational home in the Project Office.

And, of course, good project managers aren't born that way. They grow into the role by working in other roles on project teams. A Project

Office is good news for project managers and team members, as it focuses attention on the training, rewards, and career path of the project professional. But it's also good news for the bottom line, since it translates the improved capabilities of individuals into better project management ... better portfolio management ... and strategies that are executed.

At the same time, it resolves many of the issues of motivation and retention that bedevil human resources managers. For a decade or more, writers in the HR and organizational development fields have been telling us that today's workers are changing: becoming more achievement oriented, less motivated by the "hygiene factors" of money, benefits and safety, and more driven by the need for what Abraham Maslow called "self-actualizing" work. Project work, because of its time-limited and cross-disciplinary nature, offers people "zest" — a sense of urgency, continuous learning, contacts with a wide variety of colleagues within and without their specialty areas, and repeated new challenges. On the organizational level, it makes possible the "flattening" and streamlining of management, reducing bureaucracy, facilitating the development of intellectual capital, and helping the organization to stay focused on strategic goals.

## **The Project- and People-Centered Organization**

If your company has a system in place for educating, mentoring, and evaluating project personnel, you are in the minority. Many companies do not even know how many people they have who are capable of managing projects. This has led to the unfortunate phenomenon of the "accidental project manager." We would not think of dumping major accounting responsibilities on whoever happened to be available, even though they had no background in accounting. Yet this is routinely done even with major projects, even though the skill set and knowledge you need to effectively deploy a project management initiative rivals the knowledge set of an MBA in terms of complexity and integration.

Yet the project-centered enterprise, in which people are treated as though project performance really mattered to organizational performance, isn't a theory. In fact, it's the logical outcome of the application of project management to business problems. In the industries where the practice of project management has long been accepted as the way to get work done, such enterprises already exist. A study of



organizations with strong project management capability, and the related ability to leverage projects for competitive success, found that these companies display two people-centered best practices:

**1. Project-centered role design.** Project managers are given the resources and authority to match their project responsibility and held accountable by their superiors for the extent to which they achieve targets. But, at the same time, a "project director role" is created and positioned as the immediate superior of a number of project managers. Meanwhile, career paths lead individuals through project teamwork into project leadership. Organizational roles are specifically defined around project work.

**2. Valuing project managers.** Successful project-centered companies treat their project managers as an asset, retaining them in bad economic times, and being tolerant of mistakes. A sense that the company values and trusts the project manager results in more accurate estimating and reporting, and in the preservation of organizational knowledge.

Why all this focus on roles and responsibilities? From within the ranks of high-performance project managers will come the next generation of project executives: Project Office Directors, Portfolio Managers, CIOs . . . perhaps even CEOs. Experienced project managers with the aptitude for business bring a valuable project-focused intelligence to corporate leadership. But these leaders must be developed, from team members into project managers, from managers into leaders. "At the heart of organizational project management capability is the company's ability to empower and support project managers," says Oxford University's Christopher Sauer. "Individuals do not innovate and advance organizational learning just because to do so improves organizational capability; they do so because human resource policies and the organization's values encourage them to feel they have a personal stake in helping the organization perform better in the long term."<sup>1</sup>

Sauer, in his study of successful project-based organizations, points out that organizational capability is built from the ground up: by making it possible for the people who do projects to do their best. A first step in this building process is defining what "best" means, and that means implementing a comprehensive competency assessment program. The results of this type of individual assessment helps organizations begin to

harness the power of their project personnel's skills and abilities. It also allows the organization to focus training where it's most needed. Matching project manager and team competencies with the types of projects they are prepared to handle will result in more effective project execution, and thus better organizational performance.

This isn't a small change. In order to optimize the benefits of project management, organizations need to completely change their approach to hiring and training project personnel. They also need to more aggressively develop the knowledge, skills, and competencies of their project management staff. To accomplish this, the organization must focus on both developing the individual and on linking organizational roles to individual skills. Once a company begins viewing role description, recruitment, rewards, and professional development through the lens of competence on projects, many time-honored structures and patterns existing in our human resource management will change. Behaviors in the workplace are the building blocks of competence, but they are also an expression of organizational culture. It's no exaggeration to say that designing organizational human resource processes around competence on projects is a paradigm shift. Yet think of the rewards. The business needs addressed by competency models include clarifying work expectations for both team members and managers; hiring the best people and retaining them, and maximizing productivity.<sup>2</sup>

This book gathers together, in brief, some of the research done by Project Management Solutions and the Center for Business Practices over the past four years: research into project management role descriptions, project manager competency, and other related topics. If you are ready to place the emphasis in project management where it belongs — on the people who carry out projects — this book provides a springboard.

<sup>1</sup> Christopher Sauer, Li Liu, Kim Johnston, Where project managers are kings, *Project Management Journal*, December, 2001.

<sup>2</sup> Antoinette D. Lucia and Richard Lelpsinger, *The Art and Science of Competency Models*, Jossey-Bass, 1999.

# Project Office Roles & Responsibilities

J. Kent Crawford and Jeannette Cabanis-Brewin

The following position descriptions cover the gamut of project-management-related jobs in an organization that is committed to managing by projects, from executive staff members on the enterprise and organizational levels, to specialty staff. The positions in your own company probably represent a subset of those described here, since few companies have fully implemented and committed to enterprise project management on an enterprise scale of this magnitude. Lest you think these are unrealistic organizational positions, we note numerous organizations have dedicated resources much like our descriptions. Specifically, a fully mature Enterprise Project Office in fields such as construction, federal governments, and certain industry groups represent examples of such matured, projectized organizations. We offer these as downstream goals that may spark discussion and planning for the future.

On a more practical level, you may use these descriptions of the responsibilities, skills, and desired backgrounds for project personnel to craft a job description that's appropriate for your organization, or to rethink the ways in which you have assigned responsibilities to existing positions.

These snapshots of project management jobs are based on a broad review of the project management job marketplace, as represented by hundreds of job descriptions actually used in companies in a variety of industries around the world, plus ideal job descriptions crafted by

Excerpted from: *The Project Office: An Investment in Human Capital*, Marcel Dekker/Center for Business Practices, 2005 (forthcoming).

project management experts. In addition, we have refined them by limiting the sometimes unwieldy job descriptions of Project Managers and their colleagues to combinations of duties and personal characteristics that we have learned from experience are workable. So in addition to "wish list," what follows is a "reality check." Add to the list any responsibilities that are important or unique in your organization or in your industry — while being careful not to create "monster" jobs.

Position descriptions have a dual purpose: They both describe the ideal candidate for the job (and can be used as a checklist when considering internal hires or seeking external candidates) *and* they assist the person fulfilling the role in keeping focused on the right areas, in knowing when to say no, and in understanding how their job fits into the larger picture of the organization. This information can also assist project participants in identifying their own personal professional development needs, in relation to the knowledge, skills and competencies required for their project role(s). Project Managers or Project Executives may use these position descriptions as checklists for the selection of new project personnel, or to help confirm a participant's commitment to their responsibilities.

Finally, we offer this list as a kind of template in order to solve one of the most pressing human resource problems facing project organizations today: the difficulty of communicating about the work that needs to be done due to a lack of consensus on the names, descriptions, or required backgrounds of jobs in project management. A little more commonality in the language surrounding staffing projects and Project Offices will help the discipline to match the right people to the right positions.

Each position description includes an overview or general description, a list of possible responsibilities and duties, a suggested set of skills and competencies, and suggested background experience and/or educational credentials.

Note: While we are working from the premise of an enterprise-level Strategic Project Office, readers who are staffing a divisional-level Project Office (such as one within IT) can still use these job descriptions, which are scalable to any type of PO. Readers who are creating or staffing a divisional PO should be able to "read between the lines" to scale the described enterprise-level functions back to the circumstances of their specific organization.

### Chief Project Officer

Other titles that may be descriptive of this role: Director of Project Management; Director of Programs and Strategy; Director of Enterprise Project Management; Director of Project Portfolio Management

#### Role Overview

Reports to a senior C-level executive, preferably the CEO. Provides leadership, direction, and oversight of all corporate programs and projects under development and execution. This role also provides executive oversight for all divisional projects and maintains responsibility for data integration and reporting for all projects and programs within the organization. Oversees development and management of the Strategic Project Office and plays a key facilitative role in project portfolio management. May include the role of Portfolio Manager. Responsibilities for the Chief Project Officer parallel that of a Chief Financial Officer as the office of the CPO provides corporate status, reporting, analysis of all programs/projects with analysis of corresponding impacts to budget, delivery timetables, and resources.

#### Suggested Duties and Responsibilities

- Promotes the development and diffusion of project management culture throughout the enterprise.
- Maintains effective communication with senior management, making them aware of critical issues confronting corporate programs/projects and of the action plans for addressing those issues.
- In conjunction with corporate leadership, develops and manages the enterprise project portfolio management process, integrates the corporate project decision-making with corporate strategy, and facilitates on-going enterprise program/project portfolio decision making.
- Identifies needed corporate process improvements and works with business partners to effectively drive change throughout the organization.

- Facilitates program/ project reviews of critical/key enterprise programs and projects.
- Direction and oversight of all corporate systems for project planning, implementation and monitoring, insuring that all projects have clear goals, objectives and timelines with measurable milestones consistent with corporate strategy and goals.
- With the director of divisional project offices, organizes the project office structure to effectively achieve divisional and departmental project objectives.
- With the director of the divisional project offices, oversees major periodic divisional portfolio meetings, driving results and resolving key project and program issues.
- With the divisional Project Office Director, oversees preparation of key management communications such as project steering committee presentations, status reports, budget reports, etc.
- With the divisional Project Office Director, oversees relationships between project personnel and functional managers.
- With the Enterprise Project Office Director, oversees education and mentoring for staff and management regarding project management.
- Oversees and participates in the project portfolio management process, ensuring that the technical objectives of projects are integrated with commercial requirements.
- Oversees the integration of project processes with other functional areas such as manufacturing, marketing, and finance in order to ensure the success of corporate strategies, products and initiatives.
- Maintains an understanding of contemporary project management techniques and industry practices, as they impact corporate objectives.
- Ultimate responsibility for enterprise project problem/issue identification and resolution.

### Suggested Knowledge, Skills and Abilities

- Ability to analyze and synthesize information in a concise manner and to make recommendations on strategies to resolve policy and political issues.
- Demonstrated ability to use professional management and/or technical concepts to solve complex problems and oversee key projects in creative and effective ways is required.
- Strong knowledge of finance and accounting.
- Strong partnering skills.
- Ability to understand and deal with political issues in a highly matrixed environment.
- Excellent communication skills (oral and written) .
- Strong organization skills and the ability to manage multiple priorities.
- Strong project management ability.
- Strong leadership ability.
- Strong negotiation skills.
- Skills to interact with clients and business partners effectively (especially if programs/projects are developed for external client use).
- Strong skills in conflict resolution and problem solving.
- Results orientation.
- Strong analytical and interpersonal skills.

### Suggested Background, Experience and/or Education

- Extensive experience (10+ years) in the management of large, complex programs/projects.
- 7+ years of experience in the relevant industry area.
- PMP® or other project management certification or equivalent experience required.

- College degree in finance, accounting, subject related to the industry area, or a technical subject preferred; CPA or MBA is a plus; MS, or PhD in a business specialty or industry-related subject may be useful..
- Product development and delivery experience.
- Experience with relevant enterprise project management and enterprise financial systems.

### **Project Portfolio Manager**

Other titles that may be descriptive of this role: Director of Strategic Project Management, a Director of Enterprise Project Management, Chief Project Officer

#### **Role Overview**

The Project Portfolio Manager's responsibility is ideally enterprise-wide, but in practice is at present usually limited to projects in a particular division, such as IT or R&D. This position manages the corporate or divisional project portfolio by managing the process for identifying, selecting, and prioritizing projects that support corporate business strategy. This is done using a facilitative process where the Portfolio Manager (or PO Director) facilitates decisions with the leadership team by providing data, inputs, analysis and facilitative assistance so the executives reach prioritization conclusions and ultimately "own" the organizational projects. This position reports to an upper-level executive; in a small company, it may report to the CEO. The responsibilities described below may also reside with a CPO or Director of Enterprise Project Management; on a divisional level, they may be rolled into the Project Office Director position.

#### **Suggested Duties and Responsibilities**

- With a team of project stakeholders from all levels of the organization (C-level at the enterprise level; senior managers at the divi-



sional level), responsible for developing formal criteria for identifying, evaluating, prioritizing, selecting and approving the set of projects that form the corporate (or division) project portfolio. (This process should be generally consistent throughout the organization, integrated at the CPO level. In other words, the CPO should form the corporate process, integrating corporate strategy, then corporate strategy should flow down to the divisional level; while portfolio decisions by the division management should first account for delivering projects against corporate strategies, then balance specific divisional strategies into the workload.)

- With an executive committee, administers and facilitates the portfolio management process, including oversight of documentation and periodic reviews.
- With senior executives from the finance function, works to establish a system for quantifying project benefits so that project approval decisions can be made objectively. (This should be developed within the office of the CPO then flowed down to the divisions who may chose to tailor the process to meet their specific needs.)
- Assist Project Office Director in identifying project interrelationships that will affect priority and resource allocation decisions.
- With functional managers and Project Managers, oversees the process for collecting the project data on which portfolio decisions are based.
- Monitors projects in the portfolio (such as milestones, schedule performance, resource constraints, etc.) and updates executives on progress in the portfolio.
- With functional and Project Managers, analyzes the impact to the existing portfolio of changes in existing projects, or the addition of new projects outside of the portfolio process cycle, and identifies strategies (resource allocation, project sequencing) for accomplishing all the desired projects.
- Oversees the distribution of project portfolio information to executive management, directors, and other key personnel.

- With the Project Office Director and Project Managers, works to translate portfolio decisions into appropriate planning and execution of projects.

### Suggested Knowledge, Skills and Abilities

- Strategic business knowledge; a long-term focus; ability to make recommendations regarding complex strategic decisions.
- High-level organization, communication, and facilitation skills; credibility with executive management.
- Willing to assume responsibility and ownership for making critical decisions or recommendations related to approving, rejecting, and discontinuing projects.
- Negotiation and conflict resolution skills; ability to create an open environment where conflicts as to project priorities and funding decisions can be aired and resolved in an objective manner.
- High-level understanding of technical concepts as related to the industry and products/services of the company.
- Ability to instill trust, motivate, and work with other people.
- Finance, accounting and budgeting knowledge.
- Ability to create and deliver executive-level summary reports and presentations.

### Suggested Background, Experience and/or Education

- Extensive experience (10+ years) in the management of projects.
- PMP® or other project management certification or equivalent experience required.
- MBA or equivalent educational experiences and experience in business and finance.
- Experience and/or a related degree in the specific industry sector.

### Strategic Project Office Director

Other titles that may be descriptive of this role: Director, Project Management Office, Manager of PMO, Project Office Director

#### Role Overview

The SPO Director is responsible for the overall project management function, providing leadership, coordination, and management to SPO activities. Reporting to a C-level director (e.g. Chief Project Officer, or, for a department-level project office, the CIO) Chief Financial Officer, Chief Operating Officer), the person who heads the SPO creates and maintains a uniform approach to project management and serves as change agent for continuous improvement through improved/enhanced methodologies. Either personally or through a "Manager of Project Managers," the SPO Director supports other Project Managers and leads the development and application of project management methodology and culture. He or she oversees enterprise project management strategy, training, communication, program/project control/analysis/reporting, process development and tool development, and serves on the corporate committee for portfolio review. When no Chief Project Officer position exists, the position of Project Portfolio Manager may be combined with SPO Director and the SPO Director may serve on a corporate leadership team. Essentially, the SPO Director is a "relationship manager": one who serves as a conduit for communications and understanding between the project personnel who carry out corporate initiatives and the senior executives who make strategic decisions.

#### Suggested Duties and Responsibilities

- Oversees implementation of processes and products to increase project management effectiveness.
- Interfaces with senior managers to provide strategic and tactical advice on program/project planning and execution.
- Appoints or approves the appointment of Project Managers.
- Facilitates approval (through Project Review Boards) for scope and objectives, schedule and resources, roles and responsibilities of all projects.

- Oversees development and deployment of enterprise project controls tools, methodologies, and systems.
- Coordinates recurrent enterprise program/project budgets and resource forecasts.
- Facilitates resource, budget, timing, and deliverables issues resolution for all enterprise programs and projects.
- Oversees coaching and mentoring of project team members in the use of project management tools and processes and develops training standards for project managers.
- With Methodologist, ensures enterprise consistency through the development and implementation of methodology.
- Oversees risk management process.
- Maintains a master status list of all enterprise projects and provides “dashboard” reports and analysis to senior leadership.
- Oversees the development of effective SPO program/project tools to aid in process standardization (project audits, reports, templates, knowledge management tools such as a “Lessons Learned” library, and intranet)..
- With business development team, participates in business case and proposal development to ensure integration between the project planning effort and other functional areas, such as engineering, research and development, operations, marketing and sales.
- Oversees development of enterprise program/project business cases, plans, budgets, and resource requirements.
- Facilitates resolution of enterprise multi-project resource and integration conflicts.
- Accountable for SPO budget.

### Suggested Knowledge, Skills and Abilities

- Thorough understanding of budgeting, project management, and resource management.
- Thorough knowledge of company’s industry area.

- Strong negotiation, facilitation and influencing skills.
- Strong analytical, interpersonal and verbal/written communication skills.
- Strong leadership skills.
- Customer and results-oriented.
- Capable of developing solutions to complex, integrated business problems.
- Extensive knowledge of project management tools and methodologies; extensive experience with using relevant project management and business management computer software.
- Ability to influence executive-level associates and bring issues to resolution.

### Suggested Background, Experience and/or Education

- 7-10 years' project management experience in a business environment; including successful oversight of large, complex projects or programs; at least 5 years' experience in company's industry.
- Demonstrated success in management of other project managers or other experience on a management level within a project office.
- PMP® or other project management certification.
- College degree in a discipline such as Computer Science, Engineering, Business Administration or a discipline related to industry; an MBA or equivalent project management and business experience is desirable.
- Experience with roll-out of project management and process improvement in an organization, including implementation of standards and/or methodologies.
- Demonstrated ability to manage large, complex projects on time and within budget.
- Ability to express complex technical concepts effectively, both verbally and in writing, to diverse groups of people.

### Manager of Project Support

Other titles that may be descriptive of this role: Project Controls Manager, Project Support Manager

#### Role Overview

A second tier of management within a large corporate SPO might include this position, which provides line management oversight. This manager reports to the Enterprise SPO Director and manages the day-to-day project controls operations in the implementation of SPO objectives.

#### Suggested Duties and Responsibilities

- Ensures adherence to enterprise policies and procedures and SPO methodologies, guidelines, and practices.
- Oversees maintenance of enterprise program/project controls tools, techniques, methodologies, processes, and procedures.
- Manages integration of enterprise project controls tools with corporate financial, procurement, quality, and reporting systems.
- Establish communication plans and roll out strategies for implementation and continuous improvement of processes, based on metrics and feedback from SPO members.
- Maintains the enterprise program/project portfolio information database.
- Coordinates development of the annual enterprise program/project budget.
- Integrates divisional project controls reporting for enterprise reporting and analysis.
- Ensures consistent application of an effective project management methodology and tools across the enterprise.
- Perform corporate dashboard reporting with regard to resources: resource leveling, utilization forecasts, and integrated program/project analysis.

### Suggested Knowledge, Skills and Abilities

- Management skill as it relates to the administration of departmental goals and objectives.
- Ability to express complex technical concepts effectively, both verbally and in writing, to diverse groups of people.
- Strong leadership, facilitation, negotiation, and mentoring and personnel management skills.
- Thorough knowledge of project management principles and practices.
- Strong knowledge in the use and application of project controls systems and tools.
- Understanding of the use and application of business information and reporting systems.
- Thorough knowledge of company's industry.
- Knowledge of the strategic and operational issues of the project or business unit.

### Suggested Background, Experience and/or Education

- College degree in business or related discipline, plus 3-5 years experience in company's industry.
- 5 - 10 years of project management (or project controls, depending on the organization).experience in managing multiple, large, and complex divisional or enterprise programs/projects.
- PMP<sup>®</sup> or other project management certification.
- Experience in resource capacity planning and accounting processes.
- A previous project office role utilizing project management software.
- Previous experience integrating enterprise project controls software with business information and reporting systems.
- Methodology and/or process implementation background.

### Manager of Project Managers

Other titles that may be descriptive of this role: Manager of Enterprise Project Managers, Project Office Human Resource Manager, Enterprise Program Manager

#### Role Overview

In large organizations, where multiple program/project managers are managing diverse enterprise projects, a Manager of Project Managers may be needed to oversee the assignment, development, and performance of initiative project managers. The Manager of Project Managers will be responsible for the “care and feeding” of this unique set of resources. Enterprise Program/Project Managers are highly experienced and successful in delivering large, very complex, programs/projects which may last several years. These projects may involve highly complex interrelationships within the organization but may also include relationships to entities outside of the enterprise; clients, partners, vendors, government agencies, regulatory agencies, and the citizenry. This manager reports to the Enterprise SPO Director and oversees the performance of enterprise program/project managers.

#### Suggested Duties and Responsibilities

- Ensures adherence to enterprise policies and procedures and SPO practices; provides SPO interface with corporate Human Resources function.
- With enterprise HR staff, participates in design and administration of systems for recruitment, rewards, retention, and professional development of SPO staff. Oversees these activities within the SPO.
- In coordination with enterprise HR staff, develops and maintains program/project manager career progression paths, performance measurement systems, and performance incentive/rewards systems.



- In coordination with enterprise HR staff, develops and maintains project manager competency measurement programs to ensure project managers are assigned programs/ projects commensurate with their traits, skills, and knowledge.
- Enhances core project management disciplines by ensuring that project managers and project leads are enabled to consistently deliver projects on-time, within budget, and with high levels of customer satisfaction.
- Establish communication plans and roll out strategies for implementation and continuous improvement of processes, based on metrics and feedback from SPO members.
- Coordinates formal and informal program/project manager training.
- Appoints or approves the appointment of project managers.
- Ensures consistent application of an effective project management methodology across the SPO.
- Through program/project managers, oversees project activity ensuring critical tasks are identified and target dates are achieved. Participates in planning sessions as necessary to assist in determining project approach and overall time lines associated with project requirements. Ensures quality standards are met for projects overseen by the respective Project Review Boards.
- Ensures that client needs are communicated clearly to other project managers and staff. Ensures that client relations are maintained at the highest level through all phases of project planning and execution.
- Ensures that program/project managers adhere to project management methodology and Project Office procedure and that appropriate tracking, reporting and communication take place.
- Serves as a mentor/advisor on issues related to corporate politics, external politics, client relations, governmental regulation, project quality, project risk, issues resolution, conflict management, and safety,

### Suggested Knowledge, Skills and Abilities

- Ability to express complex technical concepts effectively, both verbally and in writing, to diverse groups of people.
- Strong leadership, facilitation, negotiation, mentoring and personnel management skills.
- Thorough knowledge of project management principles and practices.
- Thorough knowledge of company's industry.
- A technical background sufficient to understand the technologies and technical issues involved with the project and industry, to be able to anticipate and identify technical obstacles, and to make accurate technology decisions.
- Knowledge of the strategic and operational issues of the project or business unit.
- Demonstrated ability in conflict resolution, issues and change management.
- Strong understanding of internal/external political environment with demonstrated success in managing diverse internal/external issues.
- Understanding of legal issues and dealing with their resolutions for the enterprise programs/projects.

### Suggested Background, Experience and/or Education

- College degree in business or related discipline, plus 5-10 years experience in company's industry.
- 10-20 years of project management experience, with 3 years of experience managing project managers.
- Certification, education or experience in human resource management helpful.
- PMI® or other project management certification.

- Demonstrated success in the management of large, complex, highly interrelated programs/projects.
- Previous successful experience working with mid- and senior level executives.
- Demonstrated ability working with clients, vendors, and government regulators (if applicable) .

### **Project Management Mentor**

#### Role Overview

A PM Mentor is a project management professional with extensive project and program experience who is capable of working with project managers and project teams to help them grow in the practice of the profession. Mentors are skilled at teaching and coaching project participants. They specialize in helping to put in place the processes, skills and support structure in place to effectively establish and manage projects. Typically, mentors provide consulting services to program managers, project managers, program/project teams and corporate managers. The Project Management Mentor is well versed in leading and managing program/project team members from diverse backgrounds, and within global and virtual settings. In program/project crisis the mentor can be called in to fill-in for an extended period of time for and unexpected absence of the senior project manager or program manager. Mentors play an important role in standardizing the practice of the agreed-upon methodology, in building a project management culture, and in spreading the project management "gospel" throughout the organization by troubleshooting projects in functional areas enterprise-wide. This role is for experienced and highly skilled senior project or program managers with superior or advanced interpersonal skills. Mentors report to the Manager of Project Managers and work closely with the Manager of Project Support to assist the entire SPO staff in professional development or to effectively deliver enterprise or divisional program/projects.

### Suggested Duties and Responsibilities

- Serve as a subject matter expert for project management processes and tools.
- Work closely with or supervise Methodologists in the development of project management methodology and tools.
- Offer consulting support to new and on-going initiatives.
- Work closely with Project Managers and Business Systems Analysts to ensure all projects are managed using corporate accepted tools, techniques and methodology processes.
- Serve as a senior advisor on project management issues enterprise-wide.
- Able to provide vision and direction for strategic planning within the SPO and across the enterprise.
- Provide advise, counsel, and mentoring to program and project managers.
- Provides conflict resolution to troubled projects.

### Suggested Knowledge, Skills and Abilities

- Superior/advanced competency in project management processes.
- Full proficiency with project management tools.
- Excellent counseling, facilitation, conflict resolution, and interviewing skills.
- Able to provide visionary leadership to SPO staff.
- Skilled at internal/external consulting and relationship management.
- Well-versed in industry and in organizational politics.

### Suggested Background, Experience and/or Education

- Extensive experience (10+ years) in the management of projects, including demonstrated ability to manage large, complex projects or programs on time and within budget.

- Extensive experience in relevant industry area and understanding of strategic issues that impact the company and project management.
- PMP® or other project management certification.
- College degree in finance, accounting, subject related to the industry area, or a technical subject preferred; advanced degree in a business specialty or project management may be useful.
- Experience with relevant enterprise project management and enterprise financial software.
- Demonstrated success in the mentoring or management of other project managers or other experience on a management level within a project office.
- Experience with roll-out of project management and process improvement in an organization, including implementation of standards and/or methodologies.
- Ability to express complex technical concepts effectively, both verbally and in writing, to diverse groups of people.

## **Program Manager**

### **Role Overview**

In large organizations with many project managers, project managers may be awarded “grades” based on their span of control. This position manages complex, strategic projects that span organizational boundaries, so Program Managers should have experience managing multiple high-risk projects, including projects involving external vendors and multiple business areas. This grade is a logical training ground for Manager of Project Managers, Manager of Project Support, Strategic Project Office Director, and CPO positions for the program manager with business acumen. When groups of related projects are organized into programs, this position may manage multiple project managers whose projects provide specific deliverables; all which must be collectively managed to provide the desired programmatic results.

### Suggested Duties and Responsibilities

- Manage and direct multiple medium to large-scale projects.
- Translate generalized customer business goals and objectives into concrete strategy and tactical plans.
- Work on complex problems where analysis of situation or data requires an in-depth evaluation of various factors to achieve best results.
- Exercise judgment within broadly defined policies and practices to develop corporate methods, techniques.
- Work effectively with internal and external clients, third party vendors, and senior management in accomplishing project objectives.
- Evaluate complex situations accurately and identifies viable solutions that create successful outcomes for the customer.
- Work closely with the Program Sponsor and Program Review Board to facilitate decisions necessary for program delivery.
- Oversee effective project oversight and reviews to effect program success.
- Develop and maintain “lessons-learned” inputs to the project repository for utilization on future programs initiated by the enterprise.
- Resolve political, resource, budgeting, change, and legal issues affecting the program.
- Serves as a mentor/ advisor/ decision-maker to project managers for the program for issues related to corporate politics, external politics, client relations, governmental regulation, project quality, project risk, and safety.
- Oversee development of proposals and requests for proposals associated with the program.
- Oversee vendor relations and procurement related to the program.
- Oversee execution and delivery of projects related to successful program execution.

### Suggested Knowledge, Skills and Abilities

- Understanding of the strategic and operational issues of the project or business unit.
- Ability to train, mentor, and develop project managers in project management methodologies and their application.
- Liaison and consultative skills; negotiating skills within a context of high political sensitivity and conflicting interests.
- Presentation and written communication skills, including proposal writing.
- Ability to advise on complex matters to non-specialists.
- Demonstrated ability in managing internal and external client expectations on program requirements and deliverables.
- Highly developed business acumen.
- Skilled at requirements analysis and management.
- Strong writing, mentoring, negotiation, communication, and meeting facilitation skills; ability to utilize a combination of formal authority and persuasion skill sets.
- Strong integration skills; ability to coordinate all aspects of a project or program.
- Strong leadership, organizational, and interpersonal skills.
- Ability to manage in a matrix environment.

### Suggested Background, Experience and/or Education

- College degree in a technical discipline; education in finance/accounting or an MBA helpful. Related work experience can be substituted for educational requirement in some industries.
- Must have held project management and leadership positions (reflecting increasing levels of responsibility) in an organization of comparable size; 5-7 years project management experience with experience in large, complex projects and management of distributed project resource teams; 3-5 years of experience in the industry with previous supervisory or coaching experience

- Proficiency in relevant computer applications.
- PMP® or other project management certification.
- Demonstrated experience leading cross-functional teams within a formalized methodology.

### **Project Manager**

#### **Role Overview**

This role manages cross-functional teams responsible for delivering defined project outputs on time, within budget, and with quality results. Project Managers plan, organize, monitor, and oversee one or more projects to meet defined requirements or business specifications. They work closely with the Manager of Project Support and others in project management to guide efforts toward achieving intended business results. They report to a Program Manager, Manager of Project Managers, SPO Director, Executive Sponsor, or other senior project management role. Project Managers have primary responsibility for defining, planning, tracking and managing the enterprise project, for identifying key resources and providing the direction they require in order to meet project objectives. They also ensure appropriate management, customer and supplier involvement throughout the life of the project. Selecting the right person for the role of project manager is crucial to project success.

#### **Suggested Duties and Responsibilities**

- Determines project goals and priorities with management program manager and/or project sponsors, SPO Director, or CPO.
- Select team members; may not have direct supervisory responsibility (such as hiring and performance/pay reviews) for project team members, but provides performance input to team members' functional managers and/or the SPO Director or Project Support Manager.
- Support requirements of the enterprise program manager (if supporting a program) to provide necessary information and support for successful program delivery.
- May be responsible for one or more projects.



- Negotiate the performance of activities with team members and their managers if operating in a matrix environment.
- Coach to clarify assignments and deliverables; mentor others in project management practices; review quality of work and manages integration of team members' work
- With Project Support Manager, strategize to optimize professional development for each team member.
- Co-create a project charter with the team, including the definition of completion criteria.
- Manage and communicate a clear vision of the project's objectives, and motivate the project team to achieve them; create a project environment that enables peak performance by team members.
- Organize the work into manageable activity clusters (phases) and determines an effective approach to completing the work
- With Estimator(s), compile a complete and accurate estimate of a project; using reserves appropriately.
- With Project Planner(s), prepare project plan and obtain management approval.
- Analyze risks, establish contingency plans and identify trigger events and responsibility for initiating mitigating action. Oversee activities of Risk Administrator. Gather stakeholder input, rank the top project risks in terms of total impact.
- Work with Planner/Scheduler/Controller in tracking and reporting on progress to plan, cost and schedule reporting, and change control.
- Analyze the actual performance against the plan and make adjustments consistent with plan objectives.
- Manage relationships with project stakeholders, including internal and external clients and vendors, keeping them stakeholders informed of progress and issues in order to manage expectations on all project requirements and deliverables.
- Involve functional expertise and specialist SPO staff in design reviews and key decisions.

- Manage change to preserve business plan commitments; initiate review if objectives must change.
- Establish and publish clear priorities among project activities.
- Arbitrate and resolve conflict and interface problems within the project.
- Manage the financial aspects of the project: budgeting, estimate to actual variance, capital project management, etc.
- With Librarian, oversee project documentation and updates to relevant knowledge bases; analyze lessons learned and shares with other project directors and project managers.
- With Analyst(s), analyze original estimate against actual hours and duration, and understand the factors that contributed to any variance.
- Effectively coordinates the activities of the team to meet project milestones.
- Provides input/justification for project costs and budget impact.
- Works with Methodologist to ensure implementation of SPO standards, processes, and support services.
- Proactively identify changes in work scope and ensure appropriate planning measures are taken with internal and external clients to reassess and amend the scope of work requirement, budget, and timeline.
- Oversee the reporting activities of Planners and Analysts, determining when to escalate issues to appropriate levels of management.
- Represent project at meetings and with external consultants and departmental and senior management to assure that priorities are communicated and understood, and that progress/delays/issues are reported.
- Determine what constitutes successful closure for all parties. Gain acceptance and sign-off by all parties when closure is attained.
- Resolve issues related to client relations, governmental relations, project quality, project risk and project safety.
- Manage vendor relations and procurement related to the project(s).

### Suggested Knowledge, Skills and Abilities

- Knowledge of and competency in project management processes, including planning tasks and allocating resources, risk management, issues management, time management, financial management, HR management, working in teams, quality management, monitoring and reporting, documentation and record keeping.
- Ability to plan and facilitate meetings.
- Knowledge of the strategic and operational issues of the project or business unit.
- Strategic, conceptual analytical thinking and decision making skills.
- Adaptability and flexibility including ability to manage deadline pressure, ambiguity and change.
- Negotiating skills within a context of political sensitivity and conflicting interests.
- Presentation and written communication skills.
- Ability to advise on complex matters to non-specialists; ability to communicate effectively with senior management.
- A clear vision of what determines a successful project for the customer and for the company.
- A technical background sufficient to understand the technologies and technical issues involved with the project and industry, to be able to anticipate and identify technical obstacles, and to make accurate technology decisions.
- Personal integrity and courage to escalate issues about the project to management when necessary and to advocate for responsible solutions to project problems.
- Extensive knowledge of project management methodology.
- Exceptional interpersonal skills; the ability to work well with people from many different disciplines with varying degrees of technical experience; competence in clear, concise and tactful communication with senior management, clients, peers and staff.

- Ability to build teams and generate a spirit of cooperation while coordinating diverse activities and groups; people management and negotiating skills within a team environment.
- Ability to negotiate consensus amongst diverse groups and impact the activities of others not in own reporting structure.
- Budget management skills; Ability to analyze and review financing plans and related budgetary information to determine the impact on a project is required.

### Suggested Background, Experience and/or Education

- College degree, preferably in a technical subject; minor or advanced degree in business or industry-related subject is a plus. In some industries, work experience may be substituted for educational credentials.
- PMP® certification and/or other industry and project management certifications.
- 3-5 years experience in using formal project management methodology, techniques, and tools.
- Demonstrated expertise in creating and maintaining project deliverables such as project charter, project plan, status reports, project timesheets, estimates, communication plan, reports, risk management plan, budget (work hours and cost), milestone/deliverable charts.
- Demonstrated experience in managing issues, scope, and quality while bring projects to successful completion within the cost and time requirements.
- Proficiency with project management software tools used by the enterprise.
- Industry experience preferred.
- Demonstrated expertise in teambuilding and leading teams.

### Note: Project Manager Career Pathing

In large organizations with many project managers, project managers may be awarded "grades" based on their level of experience and expertise. A "Senior Project Manager" has all the qualifications listed above. In addition, because this position manages complex, strategic projects that span organizational boundaries, Senior Project Managers should have managed two or more high-risk projects, including projects involving external vendors and multiple business areas. Typically, large projects and high-risk projects would be given to more senior PMs. This grade is a logical training ground for Director of Project Support, Director of SPO, and CPO positions for the project manager with business acumen. In organizations with groups of related projects organized into programs, this position may be titled Program Manager; or, this level of skill may be assigned the role of Project Management Mentor.

### Suggested Duties and Responsibilities

- Manage and direct multiple medium to large-scale projects.
- Translate generalized customer business goals and objectives into concrete strategy and tactical plans.
- Work on complex problems where analysis of situation or data requires an in-depth evaluation of various factors to achieve best results.
- Exercise judgment within broadly defined policies and practices to develop corporate methods, techniques.
- Work effectively with internal and external clients, third party vendors, and senior management in accomplishing project objectives.
- Evaluate complex situations accurately and identifies viable solutions that create successful outcomes for the customer.

### Suggested Knowledge, Skills and Abilities

- Understanding of the strategic and operational issues of the project or business unit.
- Ability to train and mentor other project managers and team in project management methodologies.

- Liaison and consultative skills; negotiating skills within a context of high political sensitivity and conflicting interests.
- Presentation and written communication skills, including proposal writing.
- Ability to advise on complex matters to non-specialists.
- Demonstrated ability in managing internal and external client expectations on project requirements and deliverables.
- Highly developed business acumen.
- Skilled at requirements analysis and management.
- Strong writing, mentoring, negotiation, communication, and meeting facilitation skills; ability to utilize a combination of formal authority and persuasion skill sets.
- Strong integration skills; ability to coordinate all aspects of a project or program.
- Strong leadership, organizational, and interpersonal skills.
- Ability to manage in a matrix environment.

### Suggested Background, Experience and/or Education

- College degree in a technical discipline; education in finance/accounting or an MBA helpful. Related work experience can be substituted for educational requirement in some industries.
- Must have held project management and leadership positions (reflecting increasing levels of responsibility) in an organization of comparable size; 5-7 years project management experience with experience in large, complex projects and management of distributed project resource teams; 3-5 years of experience in the industry with previous supervisory or coaching experience.
- Proficiency in relevant computer applications.
- PMP<sup>®</sup> or other project management certification.
- Demonstrated experience leading cross-functional teams within a formalized methodology.

### **Project Team Leader**

Other titles that may be descriptive of this role: Project Leader, Project Coordinator, Team Lead

#### **Role Overview**

The Project Team Leader is usually a senior staff member appointed by the Project Manager to head up a sub-project group, and to supervise and represent a team within a large project. A Project Team Leader may be responsible for one or more project components. Team leaders should possess a subset of the skills and experience necessary to be a Project Manager. This role is a natural step in the career path to project managership. At a minimum, the Team Leaders should display:

- Knowledge of the principles and practices of contemporary project management.
- Understanding of the strategic and operational issues of the project or business unit.
- Conceptual and analytical thinking skills.
- Decision making and problem-solving skills.
- General knowledge of the use and application of project management tools and techniques.
- Adaptability and flexibility including ability to manage pressure, ambiguity and change.
- General management skills necessary to plan, organize and prioritize workload.
- Ability to work in teams.
- Communication skills required for reporting on progress and leading meetings.
- Ability to prioritize and manage well under deadline pressure.

### **Project Support Team Member**

Other titles that may be descriptive of this role: Specialist Team Member

#### **Role Overview**

The Project Team member(s) are appropriately skilled individuals who report to the Manager of Enterprise Project Support. They are assigned full-time to the Strategic Project Office but may be assigned to an individual project full-time, part-time or variably, based on the needs of the project. Naturally, the exact roles of team members will vary by project and by industry. We have attempted to create descriptions of the specifically project management-related roles that might be based in a Strategic Project Office. Specialist Team Roles within the project management discipline may include such roles as Controller, Scheduler, Risk Management, Methodologist, Systems Analyst, plus a number of other, less-common titles, described below. At a minimum, all team members, even those whose involvement in the project is on an as-needed basis from another functional area, should possess:

- Skills for working in teams: communication (oral and written), collaboration, problem solving in a team context.
- Understanding of contemporary project management principles and practices.
- Understanding of the strategic and operational issues of the project and/or business unit.



### **Project Controller**

Other titles that may be descriptive of this role: Project Controls Manager, Controls Manager, Project Controls Specialist

#### **Role Overview**

Project Controllers have the primary responsibility of tracking enterprise or divisional program and project performance against budgets, plans and schedules. Their primary area of responsibility is managing the integration of multiple programs and/or projects; providing data, analysis, and reporting to project managers and various levels of management. Project Controllers may have responsibility to integrate data from hundreds of programs and projects to provide many types of information and reporting, including trend analysis, earned value analysis, divisional or enterprise resource forecasts, resource modeling, resource leveling, cost profiling, project prioritization, divisional or enterprise budgeting, periodic status reports to departments, to divisions, and to enterprise executives. Control of costs and schedule and associated documents, especially those concerned with changes. Working with other departments, implementation contractors and consultants, they support multiple project teams through the implementation of project management controls, assisting Project Managers in conducting variance analysis, performing assessments, project forecasting, managing changes, and producing a variety of management reports. Project Controllers in large and complex organizations (or Project Planner/Controllers in smaller organizations) may have an assistant/administrator, the Issue Resolution and Change Control Coordinator, with a subset of the following responsibilities, specifically those related to administration, data entry, and communication reporting to them.

#### **Suggested Duties and Responsibilities**

- Develop and implement procedures, systems, and reports pertaining to program/project status and forecasts. Responsible for the cost/schedule control system, cost estimating capability, and the management reporting on these.

- Provide input and review for development of schedule, work breakdown structure, estimates and work packages during the different phases of a project.
- Provide input and review project estimates.
- Maintain accurate records of committed, expended and forecast costs and monitor all organizational project costs to determine and verify the Planned Value, Actual Cost, Earned Value, Cost Variance, Cost Performance Index, and Estimate at Completion.
- Maintain accurate time estimating and tracking for all organizational projects to verify the Planned Value, Actual Cost, Earned Value, Schedule Variance, Schedule Performance Index, and Estimate at Completion.
- Oversee management of scope changes, trends and change notices initiated from the project management system and review time and cost implications.
- Manage the transfer of cost data from financial, accounting, and procurement systems to the organizational project control system, review data transfer errors with the appropriate Project Planner or Project Manager and coordinate corrections with the accounting staff.
- Operational responsibility also includes cross-functional integration of above items with other systems especially finance, purchasing and contracts.
- Develop timely, accurate, in-depth analysis of organizational cost and schedule data, provide corrective action recommendations; develop and implement project cost and schedule baselines; develop, track, report subcontract accruals; track and monitor acquisition commitments; develop strategic planning schedules and provide support to project management in cost, schedule, performance measurement, forecasting and variance analysis.
- Apply appropriate metrics and tools for project control.
- Recognize and evaluate actual or proposed changes to any aspect of a project scope or schedule.
- Provide cash-flow analysis reports.
- Identify cost-savings opportunities, and develop programs to achieve long-term savings.

### Suggested Knowledge, Skills and Abilities:

- Sound task management skills and strong analytical ability.
- Ability to assign and manage work activities and meet deadlines.
- Strong oral and written communication skills.
- Strong attention to detail and organizational skills.
- Ability to work effectively as a member of a team and foster team-work in others.
- Demonstrated ability to handle multiple concurrent assignments.
- Advanced computer skills and knowledge of the most current industry standard computerized project control applications, such as cost and planning software; working knowledge of computer relational databases, computer estimating systems and budget control monitoring techniques.
- Proficiency in project control techniques and principles, and ability to perform comprehensive organizational forecasting and analysis.
- Positive customer service orientation, with both internal and external clients required.
- Strong interpersonal skills required, demonstrating a commitment and ability to work with diverse work groups and individuals.
- Ability to work in a flexible team environment and, independently with minimal supervision.
- High level numeracy, analytical skills and management accounting knowledge.
- Ability to write clear concise reports for project reporting.

### Suggested Background, Experience and/or Education

- Experience summarizing results and producing project management reports.
- Experience in budgeting, forecasting, scheduling (CPM) and analytical reporting including baselines development and Earned Value Management Systems.

- Proficiency with project controls computer applications used by employer
- 5-10 years experience in a project management role; 5+ years in planning/scheduling/controls functions.
- Industry experience.
- PMI® or other project management certification; certification in cost and/or contract management a plus.
- College degree in a technical field with up to 3-10 years experience required, depending on size and complexity of project organization.

## Project Planner

### Role Overview

Planners assist Project Managers and Systems Analysts by developing, analyzing, and managing project plans, schedules, and resource forecasts. In organizations that run many projects concurrently, Planners focus on the Project Planning phases while working closely with Schedulers, Controllers and Analysts to create schedules and keep the plan current and meaningful. In smaller organizations or project offices, the Planner role may include elements of the roles described in this book as Project Analyst, Controller, Estimator, and Scheduler; for this reason, the Planner role is often subject to overload. In this situation, individual and organizational needs should be carefully weighed (by the Organizational Development Analyst) to create and fill Planner roles that both reflect the requirements of projects, and the varying attributes (such as business acumen, technical skill, facility with analysis and figures, ability to negotiate with vendors and so on) that indicate whether a person would perform best as Planner/Scheduler; or Planner/Analyst, Planner/Estimator, or Planner/Business Analyst. Planners with strong leadership, facilitative and interpersonal skills are good candidates for Project Manager. This is a role that could have multiple career paths depending on the personal characteristics and education of the individual. Planners generally work on multiple projects and report to Project Support Manager, while working closely with and under the supervision of the Program or Project Managers they support. Entry-level Planners report to a Lead Planner in larger organizations.

### Suggested Duties and Responsibilities

- Prepare and keep current master project plans as well as subproject plans for monitoring and tracking the requirements, and stay abreast of changes to the requirements.
- Develop work breakdown structures; Critical Path Method (CPM) schedules; and resource, cost and budget plans.
- With Scheduler, create project timelines (if using Scheduler Role).
- With Project Controller, update master and sub-project plans with new information as changes occur. Monitor dependencies affected by changes.
- Provide key data to Portfolio Management to update project status and impact on overall portfolio (e.g. timelines, budget, resources, delays).
- Responsible for communicating any schedule conflicts, resource constraints, and time constraints to the project team.
- Works with staff from throughout the company as well as with Project Managers to develop detailed project plans (with all tasks, durations, resources, etc.) from concept through completion for approved projects with all the interacting departments.
- Communicate and publish plans to appropriate involved individuals to ensure each person understands the overall scope of the project and when tasks are required to be begun and completed.
- Utilize relevant project management software applications to manage projects.
- Review each project periodically to insure projects are on time and within cost projections.
- Prepare an executive summary of all exceptions on projects, inclusive of tasks that are behind schedule, tasks that are competing for the same resource, conflicting priorities and exemplary performance etc. for the executive review.
- Provide planning and resource allocation services that support the project schedule.
- Support the preparation of progress reports, standardized reporting procedures and the monitoring of overall project performance.

- Lead Planners may manage junior planners in multiple locations and handle hundreds of projects in a distributed environment simultaneously.

### Suggested Knowledge, Skills and Abilities

- Must have strong oral and written communication skills.
- Full proficiency with relevant software tools.
- Ability to work in a cross-functional team environment.
- Must be a team player and demonstrate a teamwork approach to performance.
- Good time management skills.
- Sound understanding of project management in relation to timeframes, dependencies and critical paths.
- Able to work with all levels of management and technical staff.
- Analytical ability and problem solving skills.
- Ability to remain calm and productive in a high-pressure environment.

### Suggested Background, Experience and/or Education

- 5-10 years project planning skills required for a Lead Planner.
- Demonstrated knowledge of project management, with hands-on experience and proficiency using project management tools and computer based scheduling systems.
- Experience developing project-specific and high-level milestone deliverable master plans to meet defined business objectives.
- Experience in helping perform Work Breakdown Structures in creating project schedules and estimates.
- Experience with program scheduling to include an understanding of networks, interdependencies and networks.
- Previous hands-on project experience and experience working on industry related projects.
- Experience with project earned value principles.

- Education may vary according to industry. For a Lead Planner, work experience in industry may substitute for a college (2 or 4-year) degree in a technical field.
- PMP<sup>®</sup> or other project management certification helpful; other technical certifications as relevant to industry.

Project Planners often lead small project initiatives (generally less than a month in duration with 1-2 people) and are skilled in reviewing project deliverables and technical documentation and is capable of leading facilitation sessions for group reviews and project charter definitions. A Lead Planner must have a proven track record in effectively applying project management. They may have led small-medium project initiatives (generally one-three months in duration with 3-6 people).

## Project Scheduler

### Role Overview

The roles of Planner and Scheduler are frequently combined, but in large organizations running many concurrent projects, they may be separated out. The Scheduler is responsible for the development and maintenance of schedules for multiple, large or complex projects and programs.

### Suggested Duties and Responsibilities

- Create, manage, maintain and update schedules in a complex project environment.
- Develop policy and procedures to improve the adequacy and efficiency of the scheduling processes.
- Perform critical path analysis and develop timelines for completion of tasks, measuring the deliverable work packages of the project against the project plan. Develop work breakdown structure (WBS)..
- May manage junior schedulers in multiple locations and oversee multiple projects in a distributed environment simultaneously.
- Keep Project Managers informed of impacts to project schedule.

- Work with Analysts to ensure that schedule data is accurately interpreted; work with Planners to ensure that schedule changes and their impacts are accurately reflected in the master plan.

### Suggested Knowledge, Skills and Abilities

- Must have strong oral and written communication skills and problem solving abilities.
- Good analytical skills and expertise with relevant software tools
- Ability to work in a cross-functional team environment; able to work with all levels of management and technical staff.
- Must be a team player and demonstrate a teamwork approach to performance.
- Good time management skills.
- Sound understanding of project management in relation to timeframes, dependencies and critical paths.
- Ability to remain calm and productive in a high-pressure environment.

### Suggested Background, Experience and/or Education

- 2-5 years project scheduling skills required for a Lead Scheduler.
- Demonstrated knowledge of project management, with hands-on experience and proficiency using project management tools and computer based scheduling systems.
- Experience in developing project Work Breakdown Structures used to create project schedules and estimates.
- Experience with program scheduling to include an understanding of networks, interdependencies and networks.
- Previous hands-on project experience and experience working on industry related projects.
- Education may vary according to industry. For a lead scheduler, work experience in industry may substitute for a college (2 or 4-year) degree in a technical field.



- PMP® or other project management certification helpful; other technical certifications as relevant to industry.
- High level of data manipulation and reporting knowledge is required.

### **Project Estimator**

#### Role Overview

This role works as a part of a team to develop detailed cost estimates during all phases of a project – in the proposal stage as well as for each scope change throughout the lifecycle. The Estimator works with the Project Controller to continually keep project costs realistically forecast and recorded. Since poor estimation of costs is a primary contributor to project failure in many industries, the Estimator role is critical. It requires a skill set more consistent with cost management and accounting than with the facilitative role of Project Managers yet it is a common error in organizations to expect both functions from the same person. An individual with business acumen or education may perform the role of both Estimator and Business Analyst in a smaller company; the Estimator skill set also overlaps with Project Control. One estimator can deal with many projects as early phases of the project typically require much higher levels of estimating support than do project which are underway.

#### Suggested Duties and Responsibilities

- Estimates labor requirements, required project equipment, supplies, contracted services, costs, prepares cost estimates and monitors expenditures.
- Prepares estimates for proposed change orders and updates project plans and estimates with new information on change order approval.
- With Business Analysts and Project Managers, works to accurately forecast costs of proposed projects.

- Builds systems to enhance organizational estimating capability.
- Maintains estimating databases and integrates these databases with the enterprise project controls tools.
- Integrates estimates with project schedules to achieve phased timing of costs and resources.
- Supports Risk Management Coordinator on quantitative risk assessments; provides inputs, and analysis for prediction of project cost and resource risk.

### Suggested Knowledge, Skills and Abilities

- Excellent verbal and written communications skills, including the ability to interact effectively with customers and vendors.
- Previous demonstrated experience in project cost and resource estimating.
- High-level numeracy and familiarity with accounting and finance processes.
- Ability to meet deadlines and work under stress.
- Exposure and general understanding of risk management tools and techniques.
- Familiarity with enterprise project controls tools.

### Suggested Background, Experience and/or Education

- A minimum of 2-5 years of estimating experience in a related environment.
- Proficiency with relevant computer applications.
- High school graduate (minimum) or 2-year degree with courses in accounting for entry-level Estimator.
- Project management courses desirable; PMP® required for advancement.
- Experience working in cross-functional teams.

### **Risk Management Coordinator**

Other titles that may be descriptive of this role: Risk Management Analyst, Risk Management Administrator, Risk Manager

#### **Role Overview**

Risk management has received increased attention in recent years as a neglected area of corporate planning and project execution. Creating a dedicated Risk Management Coordinator ensures that project risks will be adequately monitored and managed. Particularly when the Risk Management Coordinator supports multiple projects, there is less likelihood of a disconnect between projects creating an avoidable risk. Risk Management Coordinators work closely with Estimators, Business Analysts, Project Managers and Project Controllers to assess, monitor, manage, and mitigate risk events throughout the project lifecycle. They report to the Project Support Manager and work collaboratively with the Project Controllers or Planners of specific projects.

#### **Suggested Duties and Responsibilities**

- Perform cost and schedule “what if” analysis; prepare and effectively communicate corrective, mitigating or improvement actions.
- Identify project risk during project definition.
- Perform risk assessment, qualification, analysis, and reporting.
- Offer alternative solutions or mitigation plans.
- Identify qualitative and quantitative impacts and recommend responses through prevention, mitigation, and contingency planning.
- Communicate with others throughout the project organization about potential and identified risks and plans for corrective actions.
- With controller, monitor program/ project risks, schedule and cost variance.

### Suggested Knowledge, Skills and Abilities

- Facilitation, interviewing and listening skills.
- Experience using advanced project risk assessment and analysis tools.
- Experience in performing large, complex program and project risk assessments.
- Knowledge of legal and regulatory requirements.
- Organizational and problem solving abilities.
- Excellent written and verbal communication skills.
- Thorough knowledge of industry.
- Understanding of project management principles and practices.
- Understanding of strategic implications and of initiatives being pursued through projects.
- Research skills.

### Suggested Background, Experience and/or Education

- College degree in business, finance or a related field.
- Proficient in the use of advanced risk assessment software.
- 3 yrs. experience in project support performing project scheduling, project planning, or project controls.
- A breadth of personal knowledge and industry experience sufficient to be risk-aware.
- PMP<sup>®</sup> helpful; technical project management training a must.
- Proficiency with the company-standard project management and productivity tools.

### Methodologist

Other titles that may be descriptive of this role: Methodology Specialist, Process Improvement Coordinator; Manager of Methodology and Standards

#### Role Overview

A Methodologist keeps the SPO staff focused on the agreed upon corporate standards for project management, while remaining alert to areas where improvements in process can be made. This requires a proactive approach to project management methodology, not simply a "policing" approach. Methodologists work with the CPO, the SPO director, Manager of Enterprise Project Support, Manager of Enterprise Project Managers, and Project Managers on projects for organizational improvement, including but not limited to: Defining, monitoring the use of, training in and evaluating the effectiveness of project management methodologies. They may participate in organizational assessments such as those required to determine a project management maturity baseline, and set up benchmarking processes to identify best practices. This role also drives best practices usage within the organization to insure processes are supported and trained for.

#### Suggested Duties and Responsibilities

- Develop and maintain the organization approved project management methodology, processes, templates, guidelines, and procedures.
- Develop repository standards with Knowledge Management Coordinator.
- Develop training requirements on methods and processes with Organizational Support Analyst.
- Evaluate, select, and maintain process management tools.
- Serve as a subject matter expert for certain project management processes and tools.

- Proactively identify process improvement opportunities. Drive continuous process improvement via post-project reviews.
- Coordinate with project managers to insure all new projects/ processes are developed and optimized according to the company standard procedures.
- Maintain repository for project experience and models to insure accurate and consistent project management processes.
- Mentor and provide guidance to project teams on formal project methodologies.

### Suggested Knowledge, Skills and Abilities

- Solid understanding of project management, including project control, planning estimating, resource management, change management, issue management, risk management, vendor management and quality assurance.
- Knowledge of project management best practices, benchmarking techniques, maturity modeling and other concepts in process assessment and improvement.
- Expertise in project management methodology design and management.
- Excellent communication skills and the ability to conduct oral presentations.
- Strong verbal and written communications skills as well as listening skills.
- Ability to solicit and collaborate with all team members, including stakeholders.
- Strong knowledge and understanding of project needs, with the ability to establish and maintain a high level of trust and confidence.
- Ability to facilitate large meetings ranging from 10-30 people.
- Research skills.

### Suggested Background, Experience and/or Education

- 5-10 years of project management experience as a member of cross-functional project teams; Project Office experience strongly preferred.
- Experience in the use of structured project management methodologies.
- Proficiency in the use of project management tools.
- Experience mentoring other project managers.
- College degree in a business or technical field, with a process-improvement focus; advanced degree in business, quality management or project management helpful.
- PMP® or other project management certification required.

## **Business Analyst**

### Role Overview

Business Analysts are a primary interface between projects and business partners. They are responsible for understanding current and future processes, including processes for the entire enterprise. They define and document business needs and requirements, and generate project business cases. BAs work with Project Managers at project initiation to define costs and benefits of a proposed project prior to the project being reviewed for inclusion in the portfolio. They may participate in portfolio review meetings. Business Analysts report to the SPO director. This role may include Risk Analyst/ Administrator duties and or Estimator duties in smaller organizations.

### Suggested Duties and Responsibilities

- With functional area representatives and estimator(s), define benefits and costs of projects.
- Analyze alignment of proposals to corporate strategies.
- Document requirement to meet business needs of organization.

- Write and present business cases.
- Participate in project and portfolio reviews to maintain project's alignment with business cases.

### Suggested Knowledge, Skills and Abilities

- Strong business background with thorough knowledge of company's industry, markets and strategy.
- Skilled writer and communicator.
- Skilled at developing and presenting presentations.
- Knowledge of project management principles and practices.
- Strong business acumen and high level of numeracy.
- Extensive knowledge of financial and accounting practices.

### Suggested Background, Experience and/or Education:

- College degree in business, finance, or related field; MBA desirable.
- Project management education and training.
- 3-5 years' experience in industry.
- Experience on project teams a plus.
- College degree in Accounting or Finance plus a minimum of 5 years experience in financial statement preparation, budgeting and cost analysis.

## Project Office Administrator

Other related titles: Administrative Coordinator, Organizational Support Specialist, Project Administrator

### Role Overview

The administrative role in a project should not be minimized or overlooked. Many project managers are burdened by job descriptions that include administrative tasks that are necessary, even critical, but



which do not require a staff member with a PMP® to perform them. Any time that an experienced, highly-skilled PM spends on administrative duties diminishes his or her ability to achieve the level of management oversight that results in successful projects. Project Administrators are responsible for performing a variety of tasks in support of project management, including clerical support such as company correspondence, presentations and training materials, maintain calendars, set up meeting logistics, travel arrangements and various other duties as needed. The gathering and organizing of data is a common task. With experience and continuing professional development, they may lead or direct communications activities within the Project Office and grow into the role of Knowledge Management Coordinator.

### Suggested Duties and Responsibilities

- Develop and maintain procedures, tools, and practices that systematically control revisions to the scope, schedule, and cost of organizational projects to ensure that (a) changes are well defined and coordinated; (b) changes are approved at appropriate authority levels; and (c) approved changes are fully documented and promptly communicated to affected parties.
- Review submitted requests within the organization for changes and ensure required signatures/documentation are completed; coordinate and conduct change control meetings; update and maintain change control database; maintain change control supportive documentation and issue various reports to show status of change control.
- Maintain and monitor issues logs for all projects within the organization.
- Scribing notes at project meetings; annotating and finalizing and managing multiple sets of notes.
- Providing proactive support to SPO staff.
- Assist with PM training coordination and meeting planning and management.
- Create and distribute minutes and document the resolution of action items.

- Support communications plan and knowledge management administrative responsibilities.
- A broad range of documentation and administrative tasks including scheduling and maintaining calendars, and other tasks as required.

### Suggested Knowledge, Skills and Abilities

- Excellent verbal and written communication skills with attention to detail.
- Effective working independently or as part of a team.
- Ability to multitask; good prioritization, time management and organizational skills.
- An understanding of project management terminology and practices.

### Suggested Background, Experience and/or Education

- 3-5 years work experience, preferably in a related industry or project environment.
- High school graduate, or 2-year college degree, or equivalent work experience.
- Project Office experience a plus.
- Expert level skills with the relevant software applications.

## Organizational Development Analyst

Other titles that may be descriptive of this role: Project Human Resource Coordinator

### Role Overview

This role assists programs and projects by identifying and addressing the human impact issues such as risks and resistance that endanger the successful implementation of a program, project, or change initiative. They identify and address communication and perfor-

mance needs. OD Analysts act as training, communications, and change management experts both within the SPO and by interfacing with other functional areas that may be impacted by a project to manage the transition and minimize the impact of a change. They report to the Project Support Manager or SPO Director, and work closely with the corporate HR function to implement policies for training, retention, performance measurement, and professional development of project personnel that will lead to successful projects.

### Suggested Duties and Responsibilities

- Assist Strategic Project Office Director and HR department in developing position descriptions and performance management plans for SPO personnel.
- Design, develop, and deploy corporate project management training, education, and development programs.
- Build, deploy, and maintain enterprise project management competency program.
- Assist Methodologist with organizational assessments.
- Assist Manager of Enterprise Project Support and Manager of Enterprise Project Managers with duties related to performance management and professional development within the SPO.
- Provide meeting support through advanced facilitation skills.
- Work with the SPO Director and management staff to design and implement project management training programs.
- Assess organizational and human issues associated with implementation and change projects within the enterprise. Provide recommendations for overcoming resistance and building morale.

### Suggested Knowledge, Skills and Abilities

- Understanding of contemporary project management principles and practices.
- Understanding of the strategic and operational issues of the project and/or business unit.

- Understanding of industry issues.
- Superior/advanced listening, interviewing, facilitation and conflict resolution skills.
- Thorough understanding of organizational dynamics, including political issues and information flow.
- Excellent communication skills, including writing, presentations, teaching and coaching.
- Ability to design training programs, including performance metrics.

### Suggested Background, Experience and/or Education

- College degree in human resource development or related field.
- Project management training and education.
- 1-3 years project office or cross-functional team experience.
- Certifications in organizational development and/or human resource management subjects a plus.
- Experience developing training programs.

## **Systems Analyst**

### Role Overview

A Systems Analyst analyzes, designs, and develops information systems to support project management and acts as subject matter expert in project management technology, assisting other project personnel in effective use of these tools. In a small Project Office, this role may be combined with that of Project Controller if the candidate has the requisite project management experience.

### Suggested Duties and Responsibilities:

- Customize / configure / troubleshoot software to support project management methodology and practice.

- Define appropriate technology deployment strategies to increase organization's maturity in PM tool use.
- Identify project management software implementation and use best practices, document guidelines and procedures, and train the organization on the project management software applications.
- Integrate project management software with enterprise management and reporting tools such as; executive reporting, time collection, payroll, financial, budgeting, procurement, and reporting systems.
- Develop and deploy enterprise project controls tools, procedures, and systems.
- Maintains project controls tools with high levels of system availability.
- Monitor compliance of SPO standards as institutionalized in software products.
- Coach and mentor teams on project management tools.
- Serve as a subject matter expert for certain project management processes and tools.

### Suggested Knowledge, Skills and Abilities

- Ability to understand and appreciate project management technology and best practices as well as the ability to learn and apply new technologies/tools quickly.
- Good communication skills, both written and oral.
- Knowledge of business systems and how they integrate with the project controls tools.
- Full proficiency in a wide range of project management and productivity tools.
- Ability to work well in teams.
- Ability to assist in preparation of technology training programs.
- Teaching or coaching ability a plus but not required.

### Suggested Background, Experience and/or Education

- Computer Science, Management Information Systems, or related college degree, or equivalent work experience and technical training.
- Proficient in relevant software applications.
- 1-3 years of Project Office or project team experience.
- Project management certification and or other technical certifications as appropriate to industry and tools used in company.

### Knowledge Management Coordinator

Other titles that may be descriptive of this role: Documentation Specialist, Project Librarian, Project Information Coordinator

#### Role Overview

Formerly more often known as "Librarian" in organizations with sophisticated Lessons Learned repositories, this position is growing in importance due to the widespread recognition that project historical documents are only the first step in capturing, documenting, storing and sharing the knowledge gained by the organization in the course of each project. Today, a KM Coordinator works primarily with Web-based tools to make project information widely accessible to project teams. He or she works closely with the Methodologist to make methodology components available to SPO staff, and with Planners and Controllers to capture and communicate project status, trends and histories. Sharing administrative tasks with a Project Administrator, this role manages all project documents and maintains the corporate repository of project wisdom. This position reports to the Manager of Enterprise Project Support or a SPO Director but works closely with all members of the Project Office.

#### Suggested Duties and Responsibilities:

- Manage all project documents and coordinate documentation revisions and releases; ensure that project documents are archived for later retrieval.

- Update project management websites, intranet, or community of practice tool.
- Manage a historical database of project timeframes and estimates to improve the estimation process for future projects.
- Implement and ensure controls for reproduction of “controlled documents” to minimize potential use of obsolete documents and establish the process to cross reference the documentation.
- Develop lessons learned by applying developed project knowledge to augment corporate intellectual capital.
- Support department objectives regarding appropriate methodology
- With Methodologist, provide contributions to knowledge management portions of project management manuals for all enterprise customers.
- Assist in developing written processes, procedures and flowcharts to support department activities.
- Facilitate communication within the team by ensuring accessibility and completeness of information.
- Maintain repository standards.
- Maintain and perform periodic archiving of project records.

### Suggested Knowledge, Skills and Abilities

- Strong written communications skills and the ability to apply appropriate communication techniques to various individuals across the enterprise.
- Knowledge of systems and tools for the organizing, archiving, and retrieval of documents.
- Knowledge of project management principles and practices.
- Research skills.
- Able to handle multiple projects and deadlines.
- Detail-oriented and flexible.

### Suggested Background, Experience and/or Education

- Technical documentation abilities.
- 3-5 years of project administrative support experience.
- Proficiency in the relevant project management, productivity and KM tools.
- College degree in library science, knowledge management, or technical communication preferred.
- Project management training required; PMP<sup>®</sup> needed for advancement.

### Communications Planner

Other titles that may be descriptive of this role: Project Communications Coordinator, Project Office Communications Specialist; Communications Administrator

### Role Overview

In a large and complex organization, a dedicated role for project and SPO communications is necessary to smooth over the many potential opportunities for disconnect and miscommunication in the fast-paced life of projects. Working with the Knowledge Management Coordinator and Project Administrator(s), the Communications Planner specializes in keeping SPO personnel informed and in touch with each other and with stakeholders elsewhere in the organization or externally. In smaller organizations and when the staff member is appropriately skilled, this role may be combined with the Knowledge Management Coordinator or a Project Administrator's duties.

### Suggested Duties and Responsibilities

- Help develop enterprise-wide and project communications plan.
- Determine communication strategies and medium for information delivery.



- Interface with internal and external organizations for information delivery.
- Ensure timely delivery of all project statuses.
- Determine audiences requiring communications.
- Identify and implement effective techniques to communicate project/program objectives, responsibilities, ideas, feedback and other appropriate information.
- May publish SPO newsletter and/or contribute to community of practice website and/or intranet.

### Suggested Knowledge, Skills, and Abilities

- Superior/advanced written communication skills.
- Understanding of organizational dynamics and communication networks, formal and informal, within the SPO.
- Excellent interpersonal skills.
- Strong organizational and administrative skills.
- Knowledge of communications delivery instruments.
- Technical documentation abilities.

### Suggested Background, Experience and/or Education

- 3-5 years of project administrative support, business communications, public relations, or marketing experience.
- Experience working in a Project Office and/or on cross-functional teams.
- Experience with planning and producing communications documents.
- Proficiency in the relevant project management, productivity and publishing tools.
- College degree in technical writing, English, or business communication preferred.
- Project management training required; PMP<sup>®</sup> needed for advancement.

### **Relationship Manager**

Other titles that may be descriptive of this role: Contracts manager, procurement coordinator, outsourcing manager, Vendor support specialist.

#### **Role Overview**

The growth of outsourcing as a strategy for success has meant a proliferation of partnerships, contracts, vendors and relationships for the organization. Research shows that companies who fail at outsourcing arrangements generally do so because of failed relationship and contract management. The Relationship Manager manages contracts with vendors from project initiation to post-project review, in order to ensure that the partnership is successful.

#### **Suggested Duties and Responsibilities**

- Work external contacts and vendors to facilitate project management; obtain and share information and develop consensus on issues related to partnerships and outsourcing contracts.
- Maintain an adequate working knowledge of relevant subject matter to current assigned contracts, relationships and projects.

#### **Suggested Knowledge, Skills and Abilities**

- Must be able to work independently and handle multiple projects.
- Excellent planning, organizing, problem solving, verbal and writing skills required.

#### **Suggested Background, Experience and/or Education**

- Project management experience required.
- Computer literacy in word processing, spreadsheet, and graphics required with project management preferred.
- Contracts management experience.
- Extensive industry knowledge and familiarity with outsourcing best practices.

# Does Your Organization Have a CPO?

Deborah Bigelow

As project management has gained in importance, corporate executives have struggled to find a way to link strategic business objectives with projects. Too often, projects that have little if any connection to corporate strategy get the green light. This is usually because there is no organizational entity with responsibility to map strategy to projects and to monitor projects and portfolios against strategic initiatives.

Establishing the position of chief project officer (CPO) provides project oversight in virtually all areas of an organization, managing corporate level projects and overseeing corporate-wide resource distribution and allocation on all projects. Projects that cross divisions fall under the auspices of this position. Ideally, organizations should strive to have a CPO sit at the director or vice president level with other senior executives in the organization.

If you care about what business analysts say, you should have a Chief Project Officer as a key position within your organization.

“Chief project officers can be easily eviscerated – they make easy targets,” says Melinda Ballou, senior research analyst at Meta Group Inc., Stamford, Conn., USA. “Organizations must make a CPO a ‘facilitator’ or ‘steward’ with the highest level of executive support, appropriate staffing and good marketing or run the risk of undermin-

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ing the very rigor and process improvements that they're seeking to establish."

Research from the Gartner Group suggests that information systems organizations, which establish enterprise standards for project management including a project office with suitable governance, will experience half as many major project cost overruns, delays and cancellations as those that fail to do so. Given the resources necessary and the competitive importance of projects, the profession of project management must be elevated to the strategic level so that its impact can be felt at the bottom line.

Software vendors, with their new enterprise solutions, are unable to reach the senior level due to the current positioning of project management within organizations. Project management is still too often seen as a "functional activity."

An important part of corporate strategy is an appropriate organizational design for the implementation of projects. Projects are the basic building blocks in the design and execution of corporate strategies, requiring ongoing strategic management and surveillance. Without the proper mechanism for aligning projects with strategic objectives, organizations will experience imprudent financial performance, delay of effective strategies, wasted resources and support of a culture that condones poor quality in the management of corporate resources. One of the greatest threats to business success is an organization's inability to see the value and effectiveness of enterprise solutions. But organizations must be pragmatic as they bring in stronger project management governance.

"It's a balancing act," Ballou says. "Because if the CPO is anemic, she or he will also fail. It may seem easy. 'Put someone in charge, and you'll do fine.' But it doesn't work that way in practice because people's habits are unbending."

Project management in the 21<sup>st</sup> century is changing. Traditional project management focused on efficiency, operational performance, and meeting time and budget goals. While these are still important, today's dynamic business environment and global competition require finding new ways to make projects into powerful, competitive weapons.

### **Eight Critical Responsibilities of a CPO**

1. Strategic Input and Direction
  2. Project Portfolio Management
  3. Resource Prioritization
  4. Business Interface
  5. Development of Project Management Standards, Policies, Guidelines and Procedures
  6. Project Review and Analysis
  7. Budget
  8. Project Management Competency Development
- 

In the quest to reach these strategic objectives, project management no longer can be perceived as another operational activity. Its position in the organization must be strategic. Project management has created a strategic pathway with the emergence of alternative teams in the modern organization that deal with change initiatives, such as reengineering, benchmarking, simultaneous engineering and self-managed production. Traditional organizational hierarchies have been changes forever in favor of a horizontal, projectized form of organizational structure.

The next organizational change necessary to enable project management to be fully effective will be to have a CPO managing cross-functional activities and providing the strategic perspective that every organization needs.



# The Strategic Project Office

## Executive Roles and Responsibilities

J. Kent Crawford and Jeannette Cabanis-Brewin

Project failure rates are falling, cost and time overruns are down, and large companies have made the most dramatic improvement.<sup>1</sup> Three factors explain these encouraging results: 1) a trend toward smaller, less complex projects; 2) better project management; and 3) greater use of “standard infrastructures” — such as those instituted through a Project Office. Large companies show up as more successful in the study cited above for one simple reason, in our view: large companies lead the pack in the establishment of enterprise-level or Strategic Project Offices.<sup>2</sup>

With a Strategic Project Office, executive management can get the big picture of all project activity across the enterprise from a central source; project priority can be judged according to a standard set of criteria, and projects can at last fulfill their promise as agents of enterprise strategy.

### A “Systemic Approach”

To effectively deploy project management throughout an organization, all the players must be on board. That’s why the most effective project offices are at the corporate level, providing data on total corporate funding for projects, the resources utilized across all corporate projects, capital requirements for projects at the corporate level, materials impact, supplies impact, the procurement chain impacts. When corporate executives can effectively prioritize projects

and make fact-based decisions about initiation, funding, and resources, they are in a position to apply systems theory to their organization: to optimize the system (corporation) as a whole, rather than just tinkering with the parts (projects and departments).

Project management improvement on this organizational scope not only brings benefits to executives, however: it also requires their engagement. In fact, according to research, top management involvement is one of the key factors in organizations that demonstrate competence in managing projects, and in managing by projects; similar studies have reinforced the finding that senior-level sponsorship and visibility are keys to a successful project management office. Although only a fraction of the 67 percent of companies who have project management have enterprise-level SPOs, those companies that have a senior-level executive who oversees the PMO reported greater project success rates (projects completed on time, on budget and with all the original specifications) than those without. In fact, the higher the PMO resides in the organization, the fewer the problems reported. With actively engaged executive players, the project office acts as a communication tool, maintaining a consistent flow of communication to senior executives.<sup>3,4,5</sup>

A recent study published in the *Project Management Journal* noted that organizations with strong project management capability, and the related ability to leverage projects for competitive success, display a different view of the role of executive management. They “reframe the management task” so that the enterprise’s objective is to improve the way the organization manages its project managers and its project management processes. Improved performance on individual projects follows as an outcome of the redesigned management structure and processes.<sup>6</sup> This “systemic approach” contrasts with many organizations’ habit of focusing on and intervening in on individual projects on a case-by-case (and often, crisis-by-crisis) basis, rather than the enterprise level. So, what does the ideal executive role consist of?

## The Executive Role

The primary role of executives is to establish vision and direction for the project management initiative and allocate funding and



resources to it. It isn't necessary for executives to become project managers; but it is necessary that they enthusiastically support, with words, actions, funding, and support the aspirations of the project management community within their organizations. Ideally, management understands the strategic implications of the Project Office initiative and its impact on the company's bottom line in terms of more rapid new product development, the potential for rational allocation of resources through project portfolio management, and the resulting increased return to shareholders. (For tips on giving executives the information they need about project management, see Figure 1.)

The keystone in a Strategic Project Office deployment strategy is the Executive Sponsor. The Executive Sponsor paves the way for the deployment by dealing with other executives as a peer when conflicts over resources arose. Without an Executive Sponsor, the chances of successfully deploying a Project Office are very slim.

## Identifying the Executive Sponsor

Choose a sponsor for the SPO who can communicate the plan, and keep the organization's priorities straight. He or she must be a strong advocate for the changes involved, extremely knowledgeable about the benefits of project management, and have the ear and confidence of the powers-that-be. If senior management doesn't fully understand and support the project management approach, it may be time to bring in an external consultant who has dealt with a number of companies in your market segment to explain and execute the advantages of project management and the results achieved by others who have successfully implemented a Project Office.

The Sponsor chosen to spearhead the Project Office initiative will have a particularly important role in leading organizational change; thus the Sponsor of the Project Office initiative must be highly placed. A simple rule of thumb for choosing a person with sufficient authority is simply this: Does he or she have the authority to cancel the project?

Lack of an executive sponsor with sufficient authority is a major risk to the success of your initiative, and we recommend that work not

proceed until you engage a effective project office sponsor. This step should take place early in the initiative to ensure the project will move forward. The value of a higher-level executive sponsor is that they can help adjust priorities relevant to the priorities of the overall organization. He or she can cut thru some of the political challenges that a mid-level Project Office “project manager” will have extreme difficulty in achieving.

### The Project Office Steering Committee

As the liaison between senior corporate management and the SPO project team, the Executive Sponsor should be the chair of the Project Office Steering Committee. This committee is normally made up of the director of the SPO, the Project Sponsor, the heads of key functional organizations (members of business units affected by the project or projects being dealt with at any one time), and a senior corporate official, such as the CEO or COO. The Project Office Steering Committee should be comprised of three to seven individuals total. This committee is formed to change the corporate project culture and is active on a continuing basis to select, prioritize, and evaluate the entire corporate portfolio of projects. In addition, it acts specifically on very large projects having overall corporate impact, such as the SPO initiative. When major issues or problems with the project must be escalated, the Project Office Steering Committee provides a forum for issue/problem resolution. This committee initiates the project in a management oversight role, and also continues to hold end-of-phase reviews throughout the duration of the deployment project, monitoring progress against the objectives to determine whether or not the SPO is meeting the objectives that were established at initiation. The Project Office Steering Committee may also discover the need to include technical and internal client representatives – senior staff from other business units that may be affected by the SPO deployment. If there are external customers who are critically affected, you may want to include them on this committee as well. This group is, in effect, the board of directors for the SPO and other mega-projects.

As a “board of directors,” the Project Office Steering Committee has input into the strategic direction and will play a part in the

## Project Office Steering Committee Training

<b>Barriers to Executive Education</b>	<b>How to Overcome the Barriers</b>
<i>Executives are too busy to take time for training.</i>	<ul style="list-style-type: none"> <li>• Deliver information in bite-size components, say two hours maximum length for any one session.</li> </ul>
<i>Executives will never use project management; that's for their direct reports.</i>	<ul style="list-style-type: none"> <li>• The goal is not to create experts, but to increase their awareness of the potential of project management: to enlighten them as to how it can help them achieve their personal and professional objectives.</li> <li>• Do not focus on tools and techniques: instead, give them the information needed to interpret the various types of reports generated by project management professionals.</li> <li>• Teach enough project management so that they can ask the right questions to get the right picture from the project data.</li> <li>• They should understand the realities of managing projects, so as to avoid unrealistic expectations.</li> <li>• They should be able to connect the improvement in the management of projects with the company's business strategy.</li> </ul>
<i>Executive education must be delivered differently than the traditional classroom approach.</i>	<ul style="list-style-type: none"> <li>• Senior executives must be engaged in a dialogue of exchange rather than the classroom paradigm of "I teach, you learn."</li> <li>• An executive session requires a much smaller audience, preferably 12–15 at most.</li> <li>• Use an action-oriented format: analyze where the organization rates on the project management maturity scale, identify steps needed to move towards maturation, and assign action items to the members of the executive staff. This sends a message to all attendees that they are expected to be active participants in the process.</li> </ul>

Figure 1. Adapted from Jimmie West, Even executives sing the blues, *The Project Management Best Practices Report*, June 2000.

review of the SPO charter. In some cases, members of the committee will need to sign off on key elements of the deployment plan (such as the project charter) since the charter defines the scope of the proposed SPO and its specific roles and responsibilities with respect to functional departments and business units. The Project Office Steering Committee will also continue to revisit the goals and objectives of the SPO, as well as the critical deliverables, and continue to work within the organization to achieve executive buy-in to all those areas.

Projects cannot be accomplished by a project manager and team alone. Many of the potential obstacles to success – things like poor definition of the business case for a project, lack of alignment with strategic corporate objectives, inadequate funding, or refusal to cooperate cross-functionally among the departments – must be cleared away at the executive level of the organization. That's why the project sponsor has always played such a critical role in the successful management of an individual project.

When initiating an organizational change project on the scope of a project office, executive sponsorship is even more necessary. The level of authority required to drive this kind of change does not exist on the project team or even the departmental level. The executive leadership of the enterprise must commit the organization to this new direction and show the resolve necessary to see these changes through to completion. Make no mistake: deploying a corporate-level PO is a strategic program, and management has a critical role to play.

<sup>1</sup> The Standish Group, *CHAOS Report*, 1999; see current results at [www.standishgroup.com](http://www.standishgroup.com). Also Jim Johnson, *Turning chaos into success*, *Software*, December 1999.

<sup>2</sup> *The Value of Project Management*, Center for Business Practices, 2001.

<sup>3</sup> Lorraine Cosgrove Ware, *By the numbers*, *CIO Magazine*, July 2003; Megan Santosus, *Office discipline: Why you need a project management office*, *CIO Magazine*, July 2003.

<sup>4</sup> *The Value of Project Management*, Center for Business Practices, 2001.

<sup>5</sup> C.W. Ibbs and Young-Hoon Kwak, *Benchmarking project management organizations*, *PM Network*, February 1998.

<sup>6</sup> Christopher Sauer, Li Liu, Kim Johnston, *Where project managers are kings*, *Project Management Journal*, December 2001.

# Building Project Manager Competency in Organizations

## A Bold Approach to Professionalizing the Role of Project Manager

Dr. Jimmie L. West

One of the main reasons for troubled or unsuccessful projects is a lack of qualified, committed project management professionals. In many organizations, employees have very little incentive to assume the position of project manager, largely due to a disconnect surrounding what the role entails. Organizations have historically recognized the technical capabilities of individuals and assumed these skills could be translated into project management expertise. Because of this, professionals who have worked for years to earn the title of Senior Engineer, Technical Specialist, or Technical Consultant are unwilling to exchange their current jobs for the role of Project Manager. The role is added to their regular job description, instead of being viewed as a legitimate function to be valued by the organization, and that requires a special set of skills. Therefore, many organizations still haven't connected the value of the Project Manager to the success of the organization.

<p><b>PROFESSIONAL DEVELOPMENT ROADMAP</b></p> <p>- 1 - Define Roles</p> <p>- 2 - Establish Performance Standards</p> <p>- 3 - Assess Competency</p> <p>- 4 - Develop a Career Path</p> <p>- 5 - Establish a Professional Development Program</p>
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A second, related reason is that poor role definition – for all the roles in a project, but especially for the Project Manager – places even qualified personnel into situations where they are doomed to failure by requiring them to do too much and be expert in everything.

Research reveals that while more organizations recognize the need to improve their project management initiatives, they have a difficult task in creating a corporate culture that supports the mechanisms needed to effectively deploy a project management process.

It's a recipe for disaster.

What's needed to avoid disaster is a bold approach to professionalizing the role of Project Manager; not only in terms of providing them with the means to acquire the needed skills and competencies, but also providing them with the opportunity to achieve senior-level positions in an organization. The ultimate goal in using this approach is the creation of sustainable performance in managing projects. This can be accomplished by creating a well-trained, effectively positioned workforce that is capable of maximizing their potential in the various roles required in project management. The results will be manifested in higher job satisfaction, higher customer satisfaction, higher corporate morale, and improved project performance.

### **Step 1: Define Roles**

To initiate a program designed to professionalize the role of the Project Manager, your organization needs to identify the roles that are necessary to support the growth and sustainment of project management practices enterprise-wide. These progressively responsible roles include Project Team Members, Project Management Specialists, Team Leaders, Project Managers, Program Managers, and project executives such as Portfolio Managers or Chief Project Officers.

#### **Project Team Members**

Teams tasked with project delivery will naturally consist of numerous specialists and technologists who design the approach, perform the work, test the completed components, and bring the initiative to a conclusion. These are the people who "get the job done": the programmers who write code, the installers who install equipment, the subcontractors who provide their deliverables, and so on.

### Project Management Specialists

In all phases of the project, specialized work must be performed to initiate, plan, execute, control, and close-out the initiative. Specialized roles like Business Analysts, Project Planners, Project Schedulers, Project Controllers, Change Management Specialists, Risk Specialists, and Estimators each have unique roles to fill in collecting and reporting pertinent project information. These roles actively support and enhance the capabilities of Team Leaders, Project Managers, and Program Managers.

### Team Leaders

The Team Leader position is an important transition between team member and project manager. This is where people begin to obtain their initial experience with tackling the responsibility of managing a small portion of a larger project. The team leader requires more than an awareness of the project management practices; he or she needs to be able to execute them with a level of effectiveness. Essentially, team leaders are in the learning mode while acquiring solid project management skills.

### Project Managers

The project manager position can be divided into levels (Project Manager I, Project Manager II, Senior Project Manager, for example), depending on the needs of the organization. Project Manager I might describe an individual who has successfully led three or more small teams and is now ready to lead a small, non-complex project under the supervision of a more senior project or program manager. Project Manager II might indicate someone who has led three or more small projects and is ready to assume the responsibility of leading a medium-size project of moderate complexity. An experienced Project Manager II may be asked to lead multiple moderately sized projects. A Senior Project Manager is an individual who has demonstrated competency by successfully leading a moderately sized, moderately complex project or has managed multiple projects simultaneously.

## Program Managers

Program Managers rise from the ranks of senior Project Managers. These individuals have a track record of successfully leading complex projects. They also have the business acumen to understand the relationship of projects to their organization's strategic business objectives. They may be responsible for managing a portfolio of related projects, including the responsibility of managing several Project Managers of different levels. Along with this responsibility comes resource planning, profit management, and tactical decision-making authority.

## Project Executives

Project executives include titles such as Project Office Director, Portfolio Manager, and Chief Project Officer. They also come from the ranks of senior Project Managers and Program Managers, and use the same set of skills to effectively manage an enterprise project system.

## Step 2: Establish Performance Standards

For each of these roles, a set of expected performance standards needs to be established. Figure 1 provides a framework for identifying the desired roles and associated competencies for a proposed career path in project management. The competencies are rated on a scale from one through five. One indicates an awareness of project management concepts and practices. Two is indicative of basic execution; the individual is in a learning mode. Three is effective execution; the individual demonstrates solid skills in the use of project management tools and techniques. Four indicates that the individual models the skills of project management at a superior level. Five indicates the individual has mastered the skills and is capable of teaching, coaching, or mentoring others effectively.

This table is a representative sample of the approach to take when identifying core skills. Each of the rows could be further dissected to identify specific skills that are considered key result areas or key performance indicators for the organization. Additionally, the level of competency can also be defined according to the needs of the organization.



## Project Management Performance Expectations

ROLE:	Team Member	Team Lead	Project Manager	Program Manager	Project Office Exec
	Produces the project deliverables, performs the work	Leads 1-5 people on a segment of the project	Leads multiple teams on a small to large project	Manages multiple projects, or large, complex projects	Creates and deploys enterprise-wide PM practices; enforces compliance
COMPETENCIES					
Initiating the project	1	2	3	5	4
Developing the project plan	1	3	4	5	4
Building the project team	1	3	4	5	5
Managing stakeholders	1	2	4	5	5
Managing the project	1	3	4	5	4
Managing the team	1	3	4	5	4
Closing the project	1	3	4	5	4

Figure 1: This Project Management Performance Expectations Worksheet demonstrates the competency level for each position on a scale of one to five with five being the highest.

### Step 3: Assess Competency

Once competencies are defined, it is time to conduct an assessment of the identified project management populations. It is extremely important that a communication plan be developed and executed during this time. The purpose of this communication plan is to inform the candidates about what will be expected of them and the reason behind the assessment. It is human nature to view something like this as a way to justify an organizational realignment. The assessment process should be clearly focused on building strengths, not eliminating staff.

The first area of assessment is *knowledge*. Because the Project Management Institute's *PMBOK® Guide* is recognized as the international standard on project management knowledge, any assessment

## Knowledge Assessment Profile Scores

Percentage of Questions Answered Correctly

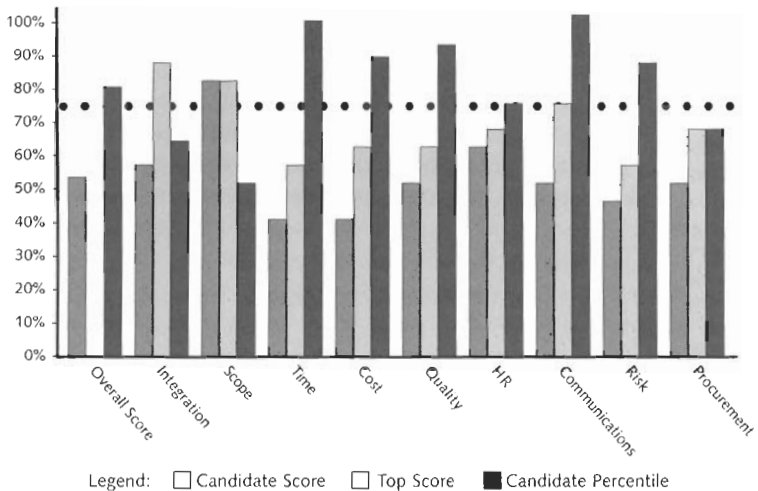


Figure 2: This chart, from a Knowledge Assessment Report, shows how well an individual compares to others tested in each of the project management knowledge areas. The dotted line represents passing score.

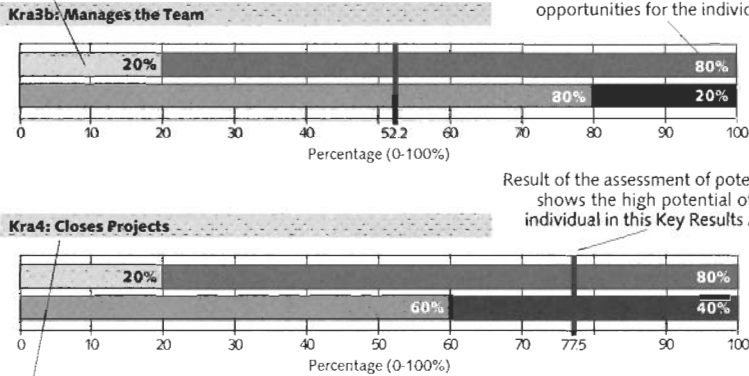
should be geared towards this standard. Figure 2 is an example of results from a completed knowledge assessment test. On an individual basis, the candidate can see how they scored on each knowledge area, how they compared to the highest score, their percentile ranking, and how many areas they passed. For the organization, an aggregate table provides insight into the areas that need improvement for their entire population. This information is used to begin developing a targeted education and training program designed to meet those needs.

The second assessment area is *behavior* in the workplace. As mentioned earlier, the ideal assessment involves the candidate, as well as someone who has first-hand knowledge of the candidate's behavior in the workplace. This person can be a peer, subordinate,

## Behavioral Assessment — Gap Analysis

Top bar shows results of self-rating and bottom bar shows supervisor's rating of the individual.

The difference in scoring indicates the gap between self and supervisor ratings. This is an opportunity to discuss professional development opportunities for the individual.



Kra = Key Results Area which indicates best practices are required to successfully perform a project

Figure 3: This chart, from a Behavioral Assessment report, shows the gap between a self-rating of a behavior and the supervisor's rating. The result is used to show the potential of the individual and the need for improvement.

supervisor, or a client. The assessment has the candidate and the rater apply scores to a number of key performance indicators across the project management process areas. There is a dual focus to this assessment: confirmation of behaviors and analysis of competency. The analysis of this assessment looks for significant gaps between the candidate and rater. These gaps are created either by the candidate rating themselves higher than the rater or the candidate rating themselves lower than the rater. When there is little or no gap found, the important thing to review is the level of agreement. Both the candidate and rater could agree on the level of performance, but in reality, that level may be less than the desired level. In that case, the organization has an opportunity for developmental actions if required. Figure 3 is an example of a behavioral assessment.

The final area of assessment is the most difficult and sensitive to determine: the *potential* to be successful in the stressful role of Project Manager. Potential is an elusive quality that can be difficult to ascertain. Nonetheless, there are identifiable traits that contribute to the success of an individual in this role. Traits such as flexibility, adaptability, assertiveness, empathy, and risk taking can be measured in order to determine the strength of an individual. Because projects come in many sizes and complexities, some individuals may thrive in an environment where they have the autonomy to run small, standard projects yet struggle when they are given a larger, more complex project. For an organization to effectively manage their projects, they need to know which Project Managers thrive under which conditions.

The real value of these assessments is learned by aggregating the results of all three assessment areas (knowledge, behavior, and potential), and using the output reports to develop a comprehensive view of their Project Manager population. A possible output could be that the candidate has adequate knowledge, poor execution behaviors, and solid potential. Using the combined information, the organization can determine where the gap really exists. It may be a matter of education, adding a mentoring relationship, or providing more directed experiences to improve performance. Another possible scenario is that the candidate exhibits superior knowledge, poor performance, and low potential. Analysis of this situation may determine that the candidate may be best suited to a specific role in the project management area, such as a Planner, Scheduler, or Business Analyst rather than a Project Manager.

Using these assessments together allows the organization to more effectively develop and deliver targeted professional development interventions for their project management population.

### **Step 4: Develop a Career Path**

The next step in building competency is the creation of a project management career path that shows individuals how they can rise from entry-level positions to the higher levels of the organization as a project professional. This career path helps the human resources department recruit qualified project professionals to the company. A

### Project Manager Training and Education Requirements

Development Activities	Type	Learning Activities	Verification
Course Completions	IL	PM Essentials	Course completion certificates
Course Exams	IL	Risk Management	Passing scores on exams
PM Knowledge Assessment Profile (PMKAP)	IL	Contracting and Negotiation Skills for Project Managers	Associate's Certificate awarded
Mentor Certification	IL	Cost and Schedule Management	Completed courses within 12 months
Master's Certificate	IL	Leading Project Teams	
Professional Certification	IL	Managing Multiple Projects	
Appropriate Job Assignments	IL	PM Practicum	
	SP	Estimating Techniques	
	SP	Advanced Risk Techniques	
	SP	Conflict Management	
	SP	Stakeholder Communication	

Figure 4: Example of a project manager education and training requirements description. IL = Instructor-Led. SP = Self-Paced.

career path includes at least three elements in order to be valuable: experiential requirements, education/training requirements (knowledge acquisition), and documentation and tracking mechanisms.

The experiential requirements detail the types of on-the-job activities that have to be accomplished for each level in the career path. The education and training requirements detail the types of knowledge that are required for each rung on the career ladder. At the lower levels, these tend to be basic courses designed to provide exposure and practice to the rudimentary skills required of that level. The upper-level positions require more advanced strategic or tactical types of educational experiences. These may include topics that go beyond the realm of project management into business strategy, financial, or leadership opportunities. Documentation mechanisms include the attainment of certificates, degrees, or other credentials that substantiate the acquisition of the desired set of skills. Figure 4 is an example of a requirements description for a Project Manager.

To support the validity of a career path, the next step is to ensure the availability of the necessary experiential and educational opportunities. The experiential opportunities need to be coordinated with the appropriate Resource Manager and the human resource department in the organization. The HR department is also valuable in the development of the training program. To be effective, information collected from the knowledge, behavior, and potential assessments is necessary to create a targeted training program. The educational program should be targeted to the requirements identified in the career path and be designed to be progressive. In other words, the training requirements of Team Members are prerequisites for Project Managers and so on. The most effective approach is to identify the learning requirements for each level and aggregate across all levels to get both introductory and advanced course requirements. The following table (Figure 5) is an example of training requirements based on job level.

### **Step 5: Establish a Professional Development Program**

Making an effort to professionalize the role of Project Manager is valuable to the individual, and is absolutely essential to the success of the organization. At the inception of a professional development program, the organization should develop a baseline of their current project performance level. This baseline serves as a benchmark against which they can measure their progress towards improved performance. A program like the one outlined here needs the support of the organization to carry it beyond the classroom and into the work environment. An expectation that communicates to the individuals in this professional development area that their behavior in the workplace is expected to contribute to improved performance needs to be clearly established. Therefore, measurements of performance need to go beyond the traditional assessment of the classroom experience for the learner. They need to include measures such as use of a standard methodology, knowledge of the practitioners, cost performance,

### Education and Training Requirements

COURSES:	PM Essentials	Risk Management	Cost & Schedule	Managing Multiple Projects	Leading Project Teams	PM Practicum
<b>LEVELS</b>						
Team Member	X					
Project Manager	X	X	X		X	X
Program Manager	X	X	X	X		
Project Office Director	X	X	X	X		

Figure 5: Example of education and training requirements by job level. Requirements at entry levels are pre-requisites for higher levels.

schedule performance, customer satisfaction, and employee satisfaction, plus others.

The Center for Business Practices' recently completed Value of Project Management Training study reveals that organizations overwhelmingly improved in a number of areas as a result of project management training. The relationship between classroom and workplace performance is highlighted by the finding that 91% of the organizations showed a moderate to extreme improvement in the individual's on-the-job performance. This validates the importance of professional development in changing how an organization matures in the execution of projects.

## Summary

Project management as a practice offers an impressive set of tools for an organization to more effectively manage their resources, both human and capital. A professional development program that incorporates the best practices of using these tools effectively contributes to improved competency. Organizations that recognize and align their resources to thrive in different types of project environments will see improvements in overall project performance. Focusing on building project manager competencies means first identifying what

needs to be improved. To do this requires a comprehensive Project Manager competency assessment program that analyzes knowledge, behaviors, and potential. The results of this type of individual assessment will help organizations begin to harness the power of their Project Managers' skills and abilities and enable them to focus training where it's most needed. Matching Project Manager skills with the types of projects they are prepared to handle will result in more effective project execution, and subsequently better organizational performance.



# Reining in Your Project Controls

## Introducing the Project Controller

Robert P. Wourms

When project management first entered the business vernacular in the 1950s and early 1960s, early adopters of project management initiatives included the construction and utilities industries as well as major defense programs. These large, bureaucratic, command-and-control organizations focused on project planning and controls and utilized tools such as Gantt charts, network diagrams, and PERT.

Since then, countless new industry trends have emerged. Organizations have flattened out, matrixed organizations have taken root, and new information technology has allowed people to communicate more effectively and reduce cycle-times across all business processes. As a result, management began pushing more projects onto an increasingly complex organization and the Project Manager suddenly became the 'Jack-of-All-Trades' — forced to be everything to everyone. The role of Project Manager is now very demanding, and requires an ever-expanding arsenal of skills, especially "soft" or interpersonal skills.

Most recently, industry professionals have noticed a powerful new trend sweeping the world of project management: the separation of duties within the Project Manager role. Specifically, many organizations are taking the intensive planning and controls work from the Project Manager and building these responsibilities into a formal Project Controller position.

Before delving into a detailed explanation of this trend, it's necessary to briefly review the existing position of Project Manager.

### **Art vs. Science: The Two Facets of Project Management**

Most professionals agree that project management skills can be divided into two basic components, commonly referred to as the "art" and "science" of project management.

The primary segment of the Project Manager's work deals with the art, or leadership, side of project management. It demands vision, communication, negotiation, motivation, and interpersonal skills. In this capacity, business acumen and knowledge of the industry serve as a critical foundation.

On the other hand, the science side requires detailed knowledge of project management methodology and tools, plus strong analytical and problem-solving skills. Here, the ability to quickly gather data and communicate status under pressure is critical.

Because these two distinct skill sets are best provided by two very different types of people, some organizations have begun dividing the current set of responsibilities into two separate positions: a Project Manager (which may include Product Managers and Program Managers), and a Project Controller.

### **The Emergence of the Project Controller Role**

The development of the Project Controller position has been an evolutionary process. Initially, many organizations created a position called "Coordinator." The Coordinator was responsible for handling administrative tasks, entering data into a timekeeping and scheduling system, gathering status information, and helping to produce status charts.

Over time, additional responsibilities — such as developing the initial schedule and estimates, caused many organizations to develop the role of "Planner." Other organizations had this role perform ongoing schedule tracking and analysis, often using the term "sched-

uler." Responsibilities of tracking issue and risk logs, analyzing schedules, and facilitating all planning and status sessions — were usually included in the role.

More recently, responsibilities increased to include handling resource allocations and constraints, schedule and critical-path analysis, financial reporting of earned value, and providing other documentation sufficient to comply with regulatory requirements such as the Sarbanes-Oxley Act.

Today, the role of Project Coordinator, Planner, and Scheduler has evolved into that of "Project Controller." The Project Controller supports the Project Manager by handling most of the critical, detail-oriented, analytical-focused, time-intensive project tasks. As a result, the Project Manager is free to focus on more strategic project goals and objectives, and often is even able to take on additional projects.

Best practice organizations look at the Project Manager as the CEO of the project, and the Project Controller as the CFO — two roles that operate independently of each other, yet are critical to the other's success. The CEO develops the overall vision and provides leadership for the entire organization. The CFO, on the other hand, ensures the financial viability of the firm by following strict industry policies and procedures. Both the CEO and CFO lean on and trust the other to achieve organizational goals. Like the CEO and CFO, both the Project Manager and Project Controller carry out crucial duties, and both possess significant albeit different skill sets and responsibilities in order to bring the projects in on time and under budget.

### **Job Responsibilities of the Project Controller**

The Project Controller is a key member of the project team and works directly with the Project Manager to help define the project's goals and objectives; create and maintain a project's budget and schedule, analyze progress reported against the work schedules; and recommend and take action to improve progress. For a visual representation of how the two work in tandem, see Figure 1.

In order to ensure accurate documentation and reporting on a consistent basis, many organizations are positioning the Project Manager and Project Controller as part of a centralized Project

## PROJECT MANAGEMENT ROLES & RESPONSIBILITIES

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<b>PMBOK® Guide Knowledge Areas</b>	<b>Project Manager Functions</b>	<b>Project Controller Functions</b>
Scope Management	<ul style="list-style-type: none"> <li>• Work with project owners to ensure all scope (features/ functionality) is explicitly defined and documented</li> <li>• Accountable for maintaining integrity of scope, or authorizing scope changes</li> </ul>	<ul style="list-style-type: none"> <li>• Track scope changes</li> <li>• Gather data and analyze impact of change</li> <li>• Make recommendation(s) to the project manager</li> </ul>
Quality Management	<ul style="list-style-type: none"> <li>• Ensure project fulfills business needs</li> <li>• Overall responsibility for the quality of any products delivered by the project</li> <li>• Accountable for overall health of the project</li> </ul>	<ul style="list-style-type: none"> <li>• Collect project documentation for quality reviews</li> <li>• Prepare project status reporting on a set-interval basis, i.e. provide a project dashboard giving a high-level view of the project's health</li> </ul>
Time Management	<ul style="list-style-type: none"> <li>• Obtain approval on schedule and any revisions</li> <li>• Proactively improve the project timeline through parallel tasking or finding smarter ways to carry out work</li> </ul>	<ul style="list-style-type: none"> <li>• Develop and maintain schedule</li> <li>• Collect status updates for tasks</li> <li>• Analyze variations, slipping tasks, impact of task changes, critical path, overall ability of project to deliver on time</li> <li>• Perform earned value analysis</li> <li>• Perform burn rate projections</li> <li>• Recommend improvements</li> </ul>
Cost Management	<ul style="list-style-type: none"> <li>• Work with Owner/Sponsor to obtain initial budget</li> <li>• Proactively obtain further funding if needed</li> <li>• Charged with ultimately delivering project within set budget</li> </ul>	<ul style="list-style-type: none"> <li>• Track all expenditures</li> <li>• Analyze spending trends and estimate final costs; report any deviation from baseline</li> <li>• Recommend method to keep project under budget</li> </ul>
Risk Management	<ul style="list-style-type: none"> <li>• Canvas team to identify all issues and risks; liaise with other business partners or PMs who have completed similar projects</li> <li>• Develop mitigation ideas and work to have strategies in place should they be needed</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitate team session to identify risks</li> <li>• Document/track issues, risks</li> <li>• Oversee risk analysis &amp; impact</li> <li>• Provide project manager with status report of open issues and risks</li> <li>• Escalate, as necessary, extraordinary risk impacts and /or issues</li> </ul>

Figure 1. Job responsibilities of Project Managers and Project Controllers

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 REINING IN YOUR PROJECT CONTROLS
 

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**PMBOK® Guide Knowledge Areas****Project Manager Functions****Project Controller Functions**

## Procurement Management

- Ultimately responsible for procurement of all products, resources, and materials necessary to successfully complete the project
- Maintain open communication with suppliers/procurement to ensure quality products/services from suppliers.

## Communications Management

- Communicate with entire organization, from the project team to the C-level;
- Negotiate conflict resolution when needed, between team members or business partners
- Honestly represent project status to project sponsor and other stakeholders

## Integration Management

- Charged with making sure that the project plan and processes are followed throughout project; negotiating with sponsor or key stakeholders should modifications to the plan become necessary

## Human Resource Management

- Resolve conflict within the project team
- Boost morale and reward project victories, i.e. hitting milestone dates
- Negotiate with project sponsor to obtain scarce resources or materials
- Garnering team buy-in and support for the project

- Build sub-schedule to determine procurement dates
- Collect updates from suppliers and analyze impacts to project schedule

- Communicate with team to delegate tasks and provide status of project activities and milestones
- Facilitate planning sessions including development of project charter, project plan, WBS, network diagram, and schedule.
- Facilitate risk sessions
- Facilitate lessons learned sessions

- Work with the project team to develop a project plan, including facilitating processes for handling risks, issues, scope, quality, and general project communication

- As part of schedule development, determine that project has all needed resources
  - Ensure resource allocations are current, i.e. that a resource has adequate project hours to cover tasks and has availability to work on project
  - Educate project team on status reporting techniques and manage the process.
-

Support organization, usually referred to as the Project Management Office (PMO) or the Project Office. Typically, the PMO reports to a high-level business executive who is responsible for driving the business in his or her domain, whether they are the CIO, VP of Operations, or Head of New Product Development. In today's more regulated business world, these executives demand consistent and reliable status reporting across all their projects.

As a key contributor within the PMO, the Project Controller is responsible for carrying out the following six functions, which provide critical input into the project reporting process.

### Educate the Team on Proper Processes

The Project Controller educates and advises the team on project management policies and standards, methodologies, and processes across all phases of the project: initiating, planning, controlling, executing, and closing. This includes describing the processes' purpose, utilizing scheduling and costing tools, determining who is responsible for deliverables, and detailing approval procedures.

### Facilitate/Oversee Project Planning/Control Sessions

Organizing and facilitating team planning sessions also fall within the realm of the Project Controller's role. These sessions may deal with a variety of topics such as planning, developing the Work Breakdown Structure (WBS), developing the network diagram, integrating the WBS and network diagram into the project schedule, estimating resource hours and task durations, controlling issue/risk management, capturing lessons learned, and project reporting.

### Develop the Project Schedule

Using organizational project office standards, the Project Controller works with other key members of the team to develop the project schedule, including resource leveling and critical path analysis. Once base-lined, the schedule is used to measure work progress, manage resource assignments, track milestones, and monitor and report on project performance metrics.

### Control Progress to Ensure Success

The Project Controller proactively “manages” the schedule to ensure that the project is delivered on time. As part of this responsibility, the Project Controller must: regularly collect task statuses and update the schedule; analyze any variation or forecasted variation to the plan, emphasizing items such as critical path, slipped tasks, and upcoming tasks; calculate, analyze, and present metrics such as earned value; manage resource assignments including submitting resource requests, monitoring current allocations, and forecasting future needs; and meet with the project manager to discuss project status.

### Track and Analyze Costs

The Project Controller must work with available accounting and project management software tools to track actual (or blended) costs, including labor hours, equipment usage, procured resources, etc. He or she must also analyze cost run rates and variations to extrapolate/forecast total costs, as well as report findings to the Project Manager, project office, and any financial oversight committee.

### Manage Issue, Risk, and Change Control

The Project Controller ensures that issues, risks, and change requests are identified, analyzed and estimated, so they can be escalated to the appropriate levels of management for disposition, and documented/tracked in the project’s collaboration database. The Project Controller monitors issue, risk, and change request resolution dates; contacts team members listed as responsible parties, for status and documentation; offers assistance to responsible parties to facilitate progress and/or resolution meetings; and, provides the Project Manager with the status of open issues, risks, and changes.

### Document and Deliver Status Information

With new corporate governance standards for many organizations, the Project Controller is recognized as the individual responsible for developing earned value reports and presentation material for

executive management. Although the Project Manager is tasked with corporate communications, it's the Project Controller who performs the analysis and forecast and makes recommendations.

### **What Makes a Good Project Controller?**

In order to efficiently handle the responsibilities outlined above, the successful Project Controller must possess technical expertise in project management software, and related spreadsheet and/or database (financial, resource) tools; as well as business process expertise in cost budgeting and estimating, risk analysis, critical path diagramming and analysis, resource forecasting, and change control.

It's important to note that the Project Controller may be supporting several projects simultaneously (based on project size and work experience). Therefore, he or she must also be flexible in dealing with multiple Project Managers, while maintaining the required level of standards demanded by the organization.

### **Getting Executive Buy-In: How to Build a Successful Business Case for Project Controllers**

Corporate decision makers — not to mention stockholders — keep a close eye on all of their investments. The first and foremost thing that executives need to know about project management is its ultimate impact and value on their businesses. They may be suspicious of any new expenses — especially if the expenses include expanding their project management staff to include a new role.

The key to building a successful business case for the Project Controller role is to educate corporate decision makers about the responsibilities of the new position, and emphasize the positive impact that it will have on the company.

Here are a few key points to include:

- **Strengthen communication with high-level executives.** With the support of the Project Controller, Project Managers can



share vital information more regularly — including financial reporting of earned value and other documentation sufficient to comply with regulatory requirements such as the Sarbanes-Oxley Act — without taking time away from other critical project areas. Executives will have a better understanding and more control of the projects and their financial implications, and decisions will be made in a more timely fashion.

- **Leverage the Project Manager and take on additional projects.** By utilizing the Project Controller role, companies can leverage and expand the capacity of project managers to handle more projects concurrently. This will enable the organization to derive benefits more quickly than before. In addition, the Project Manager should be able to spend more quality time with executives in explaining status, gaining insight into political and budgetary issues, and basically “selling” the project.
- **Boost staff motivation.** Many Project Managers are frustrated with the detailed tasks of project planning and controls. They would much prefer to deal with executives on scope management issues, handle high-risk issues, communicate status to the organization, and work other high visibility activities. Having a professional Project Controller reduces stress on the Project Manager and makes the job more enjoyable. Similarly, most Project Controllers do not enjoy the “politics” of project management, and would prefer to deal with the tactical staffing and scheduling issues. This, to them, is less stressful and more rewarding. Utilizing two people in these two roles of project management motivates both sides to perform their jobs well.
- **Improve project performance and project success rates.** By delegating critical yet time consuming tasks to a Project Controller, Project Managers can focus on higher-level project issues, while Project Controllers can ensure that no part of the project is missed or delayed due to scheduling issues or communications failures. This means that more projects will be completed on time and within budget — saving the company the debilitating cost of project failures and project delays.

### Tips for Outsourcing Project Management Functions

As the demand for Project Controllers grows, an interesting “trend within the trend” has been identified: outsourcing project management functions.

In fact, during a recent survey of several hundred Project Office Directors and senior-level executives, 39 percent of respondents said that they currently outsource project management functions such as project controls, or are considering it. In addition, more than half (61 percent) of the responding companies use outside consultants for project management, primarily for augmented staffing.

Here is a quick look at some additional benefits of outsourcing the Project Controller role:

- Immediate use of professionally trained and experienced Project Controllers, without the cost of recruiting, hiring, and training.
- Consistency across all projects in following a standard methodology and reporting techniques.
- Objective assessment of project status (no political fallout when key projects are reported to be in trouble).
- Allows internal Project Managers to take on additional, concurrent work without losing control over existing projects.

For companies whose Project Managers simply have too many responsibilities to complete them efficiently and effectively, outsourcing the Project Controller role is a viable option. These external resources can forge a trusted partnership with internal project managers, enabling them to achieve higher project success rates — a win-win for the Project Manager and their organization.

However, the Project Controller role is just one piece of the complex project management puzzle. As business needs evolve, many companies are finding that they need additional project management

personnel to help support and manage their project initiatives. They're turning to outside firms to provide experts to round out their project management team, so they can get the immediate expertise they need without straining their resources.

Here are a few other positions to consider outsourcing:

- **Mentors.** Look for highly seasoned professionals with extensive project and program management experience. Mentors should be well-versed in project management methodologies, have earned the Project Management Professional (PMP®) designation, and have the interpersonal and communication skills required to coach and mentor project managers. A qualified mentor can work with management to implement new processes, using proven change management, training, and organizational development techniques.
- **Project Managers.** When outsourcing a Project Manager, look for one who has earned the Project Management Professional (PMP®) designation and who has the knowledge and experience to plan, control, and execute projects similar to those of your size and complexity. This individual should come into an organization already trained and motivated to perform at a high level immediately. Good Project Managers are strong communicators, able to establish rapport at all levels within an organization.
- **Methodology Developers.** Should you need a new or revised project management methodology, a professional process developer may be the best choice. Most organizations do not develop business processes for a living; consider moving an experienced professional into the role for the duration of the effort to handle all integration and process customization tailored to your environment.



# Project Control Functions

## A Benchmark of Current Business Practices

James S. Pennypacker

Organizations do not perform project control functions well. Managing issue, risk and change control processes are particularly troublesome. These conclusions are among the results of a survey of fifty-four project management practitioners by the Center for Business Practices, the research arm of the consulting and training organization, PM Solutions.

The CBP surveyed senior practitioners with knowledge of their organizations' project management practices and business results. The survey, *Project Control Functions: A Benchmark of Current Business Practices*, was designed to investigate best practices in the performance of project control functions in organizations.

The survey results revealed that half of the organizations responding performed project control functions average to poorly. Three functions in particular were cited for needed improvement: managing the process of issue, risk and change control; educating the project team on proper project management processes; and estimating project costs. Organizations are best at documenting and delivering project status information.

They also showed that most organizations do not recognize project controls as a specific job role. Project control functions are typically performed by Project Managers, who either report to a centralized project office or to specific departments within their organization.

Excerpted from *Project Control Functions: A Benchmark of Current Business Practices*, Center for Business Practices, 2004.

Observations and conclusions drawn from the study include:

- In most organizations (83%), project control functions are performed by multiple roles, mostly by project managers (64.8%) or project coordinators (38.9%).
- A majority of those performing project control functions report to either a centralized project office (33.3%) or to decentralized departments within their organization (37.0%).
- More than half of the organizations responding use (49.1%) or plan to use (5.7%) augmented services (consulting, staffing, outsourcing) to perform project control functions.
- More than half of the organizations responding performed project control functions average to poorly. Below are the average scores, based on a scale from 1 (very poorly) to 5 (very well), showing how well organizations performed individual project control functions:
 

• Documenting and Delivering Project Status Information	3.40
• Developing the Project Schedule and WBS	3.20
• Facilitating/Overseeing Project Planning/Control Sessions	3.13
• Estimating Project Costs	3.11
• Managing the Critical Path to Ensure Schedules are Met	2.96
• Educating the Project Team on Proper PM Processes	2.94
• Tracking and Analyzing Project Costs	2.94
• Managing the Process of Issue, Risk and Change Control	2.81
- Sarbanes-Oxley and other government mandates have had little effect on organization's project control processes.
- Tracking actuals, improving project management software tools, creating a strong project management governance structure, and educating on the benefits of using project controls were a few of the practices cited as means to improve the organization's project controls.

## About the Authors

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## About the Center for Business Practices

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The Center for Business Practices, the research and publishing arm of PM Solutions, harnesses project management knowledge and expertise and integrates it into products and services to deliver comprehensive, fact-based information to customers.

### **CBP Benchmarking Consortium**

Membership in the CBP Consortium provides access to the CBP Project Management Community of Practice, a website that houses the complete CBP Library (newsletters, research reports, benchmarking forum reports, measurement tools, etc.), and access to hundreds of PM best practices. Organizational members receive a copy of each of our PM Practices books, two delegate passes to our benchmarking forums, and a customized benchmarking survey administered through the CBP website.

### **CBP Research**

The CBP conducts original research that will help organizations improve their project management practices. Current research reports include: *The Value of Project Management*, *The State of the PM Industry*, *PM Maturity Benchmark*, *Project Portfolio Management*, *The Value of Project Management in IT Organizations*, *Getting Executive Buy-in* and *The Value of Project Management Training*.

### **The Project Management Benchmarking Forum**

The Forum is a structured exchange of knowledge among senior-level project practitioners. During the facilitated two-day Forum attendees identify and agree upon project management best practices that they can apply immediately to benefit their organizations.

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# Project Management Roles & Responsibilities

*Project Management Roles & Responsibilities* provides comprehensive descriptions of the responsibilities, skills, and desired backgrounds for project personnel to guide you in crafting job descriptions that are appropriate for your organization, or to rethink the ways in which you have assigned responsibilities to existing positions. The positions described in this book include:

- Chief Project Officer
- Project Portfolio Manager
- Strategic Project Office Director
- Manager of Project Support
- Manager of Project Managers
- Project Management Mentor
- Program Manager
- Project Manager
- Project Team Leader
- Project Support Team Member
- Project Controller
- Project Planner
- Project Scheduler
- Project Estimator
- Risk Management Coordinator
- Methodologist
- Business Analyst
- Project Office Administrator
- Organization Development Specialist
- Systems Analyst
- Knowledge Management Coordinator
- Communications Planner
- Relationship Manager

The Center for Business Practices is the research and publishing arm of PM Solutions. For more information, visit [www.cbponline.com](http://www.cbponline.com).

PM Solutions is a management consulting, training, and research firm dedicated to optimizing business performance through project management initiatives. Core services include project staffing/outsourcing, organizational project management maturity assessments, process and methodology development, project office deployment and enhancement, project management technology integration, project portfolio management, value measurement, and corporate training delivered through the PM College® ([www.pmcollge.com](http://www.pmcollge.com)). PM Solutions' comprehensive approach integrates business strategies with project management practices, enabling sound management decision-making and improved performance. For more information, visit [www.pmsolutions.com](http://www.pmsolutions.com).

