

APPENDIX X3

RECOMMENDED SURVEY QUESTIONS REGARDING IMPLEMENTATION OF OPM INITIATIVES

The survey questions contained in this appendix are intended to help an organization perform a self-assessment to determine where it stands with regard to implementation factors associated with OPM. This survey is designed for organizations in the foundational or improvement stages. It is not intended to be an exhaustive or restrictive list, but rather guide users to typical critical implementation considerations. Another approach is to conduct a more formal assessment using *Organizational Project Management Maturity Model (OPM3®)* [10] and related services.

X3.1 QUESTIONS RELATING TO IMPLEMENTATION OF CRITICAL SUCCESS FACTORS

X3.1.1 SUSTAINED LEADERSHIP

- ◆ Who is the most senior, appropriately qualified person to sponsor a program fostering OPM?
- ◆ Who is the most senior, appropriately qualified person to lead OPM initiatives on a daily basis?
- ◆ What leadership network across the organization is best positioned to serve as a governance group or steering committee for OPM?
- ◆ What relevant current sponsorship practices are in place?

X3.1.2 CONTINUOUS IMPROVEMENT

- ◆ What actions does the organization take to keep track of the achievements in organizational strategy? What success criteria are used?
- ◆ Who in the organization keeps track of the achievements in organizational strategy?
- ◆ How does the organization identify areas that need to be improved?
- ◆ How does the organization manage risk?
- ◆ Who in the organization defines the contingency plans?
- ◆ How does the organization identify opportunities (internal/external) that may help to achieve organizational strategy?

- ◆ How does the organization identify threats (internal/external) that may affect the achievement of organizational strategy?
- ◆ How often is a gap analysis conducted and when was the last one performed?
- ◆ Who in the organization defines the actions to be taken to achieve the organizational strategy?
- ◆ How are the organization's continuous improvement activities related to portfolios, programs, and projects?

X3.1.3 ORGANIZATIONAL CHANGE MANAGEMENT

- ◆ Do the business functional areas work in silos?
- ◆ How do the business functional areas in the organization perceive the support functions?
- ◆ How do the supporting functional areas in the organization perceive the business functional areas?
- ◆ What is the general perception of the supporting functional area?
- ◆ What is the general perception of the business functional area?
- ◆ Does the organization have cross-business functional area initiatives?
- ◆ Have the cross-business functional area initiatives been successful in the organization?
- ◆ What was the level of involvement of supporting functions in cross-functional initiatives?
- ◆ Does the organization link initiatives with business processes?
- ◆ How do projects fit into the cross-business initiatives in the organization?
- ◆ How do projects fit into the business processes?
- ◆ How does the organization manage change?
- ◆ Who leads change management in the organization?
- ◆ Does the organization have a change management process or policy?
- ◆ What communication channels exist for each type of stakeholder? How effective are these channels?

X3.2 QUESTIONS RELATING TO GENERAL READINESS FOR OPM INITIATIVES

- ◆ **Business results.** What is the current performance of contributing portfolios, programs, and projects?
- ◆ **Environmental factors.** How do the projects resonate with competitors, customers, or regulators?
- ◆ **Organizational culture and style.** What is the prevalent decision-making model? Is communication informal or formal? What is the organization's tolerance for risk? How results-oriented is the organization? What are the policies and practices relating to how employees are treated and encouraged to develop?
- ◆ **Organizational experience with substantial improvement changes.** How well does the organization handle change? Is the organization agile when it comes to change? What competing change initiatives could interfere with an OPM initiative?

- ◆ **Organizational process assets.** What is the governance process related to portfolios, programs, and projects? How does enterprise risk management fit within the context of OPM? How effective is the project management information system? What other management systems require consideration?
- ◆ **Organizational strategic planning.** Is there a clear bridge from strategy, vision, and mission to the organization's programs and projects?
- ◆ **Organizational structures.** What are the existing related organizational structures or policies directing structure that may help or hinder an OPM implementation? Is the organization considered to be functional, matrix, or project centric?
- ◆ **OPM-related roles and responsibilities.** Are there PMOs in place? Is there a formal or informal community of project management practice?
- ◆ **Previous organizational project management assessment results.** What credible knowledge exists regarding current capabilities and performance results relating to portfolios, programs, and projects?
- ◆ **Stakeholder list.** Who are the people in the organization that need to be on board for an OPM initiative? What will it take to get them there?

X3.3 QUESTIONS RELATING TO THE IMPLEMENTATION OF CORE-ENABLING PROCESSES

X3.3.1 STRATEGIC ALIGNMENT

- ◆ Does the organization have a documented strategic plan? Is it visible in yearly business plans?
- ◆ Do the business functional areas of the organization start projects independently without consulting the senior management team?
- ◆ Do all business and supporting functional area heads understand the purpose of the organization?
- ◆ How integrated are the business and supporting functional areas in the organization?
- ◆ Does the organization understand the benefit of aligning business and supporting functional areas to achieve the purpose of the organization?
- ◆ Do the heads (i.e., manager/director/vice president) of the supporting functional areas understand what the business functional areas do for the organization?
- ◆ Do the heads (i.e., manager/director/vice president) of the business functional areas understand what the supporting functional areas do for the organization?
- ◆ Do the employees of the organization understand what the supporting functional areas do for the organization?
- ◆ Do the employees of the organization understand what the business functional areas do for the organization?

X3.3.2 ORGANIZATIONAL PROJECT MANAGEMENT METHODOLOGY

- ◆ What is the level of project management knowledge in the business functional areas?
- ◆ What is the level of project management knowledge in the supporting area functions?
- ◆ When working together, do the business and supporting functional areas in the organization have a holistic approach to engaging portfolios, programs, and projects, or do they focus on their own areas of expertise?
- ◆ Does the organization have a documented project management methodology of practices and techniques?
- ◆ What is the project management team's level of experience?
- ◆ Does the organization have a project management office? What services does it provide?
- ◆ How does the organization define success and failure metrics for projects?

X3.3.3 GOVERNANCE

- ◆ Who in the organization approves major projects, for example, general manager/CEO, business functional area head (i.e., manager/director/vice president), or approval committee?
- ◆ Does the organization have a governance model/framework inclusive of portfolios, programs, and projects?
- ◆ If so, does the governance model/framework cascade through the business and supporting functional areas?
- ◆ If not, who in the organization identifies variances in the achievement of the organizational strategy?
- ◆ How often does the organization review the milestone achievements of the organizational strategy?
- ◆ Who belongs to the governance entity in the organization?
- ◆ How often does the governance entity meet?

X3.3.4 COMPETENCY MANAGEMENT

- ◆ Does the organization have formalized training and development plans for the business and supporting functional areas that support portfolio, program, and project management?
- ◆ Does the organization have a career development framework for the business and supporting functional areas that includes portfolio, program, and project management?
- ◆ How do the business and supporting functional areas share lessons learned that relate to improving the quality or efficiency of portfolios, programs, and projects?
- ◆ Does the organization support the creation and development of OPM-related communities of practice?
- ◆ How does the organization assess the skills of the management team and employees, related to portfolios, programs, and projects?
- ◆ Who in the organization is responsible for the professional development of the management team and employees in the areas of concern to OPM?