



Agenda

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Building and Transforming the Next-Generation PMO and Portfolio Management for Today's Turbulent and Uncertain Environment

Instructor(s): Jack Duggal, PMP

Prework: None

Length: 3 days

CEUs: 2.1/see below for PDU breakdown

Level: Advanced

Training Topic: Strategic Planning and Implementation

Subtopics: Portfolio Management, PMO

Training Description:

How do you build and sustain a project management office (PMO) for today's disruptive world? How do you enhance strategic execution capabilities? How do you transform your PMO to the next level? How do you provide sustainable PMO value and results? This training is designed to address these questions and more with real-world PMO and portfolio management practice and experience from leading PMOs worldwide.

In addition to learning the foundational elements and DNA of a PMO, this training will outline the steps necessary to bring your PMO to the next level. You will gain new perspectives on project management and PMOs for today's turbulent business environment. Find out how to build strategic execution capabilities while balancing the need for governance and discipline with responsiveness and agility. You will also learn how to apply next-generation approaches to transform your PMO to an adaptive and agile PMO, as appropriate for your organization.

This training will focus on creating the right environment for portfolio management by providing a framework for project selection, prioritization, oversight, and governance. Every organization is unique, and this engaging training will provide a framework that can help you assess your organizational environment and culture as well as chart an appropriate roadmap to evolve your PMO and portfolio. You will also learn how to measure PMO value and customer satisfaction with a PMO Delight Index (PDI).

Additional PDU-Earning Opportunities

In addition to receiving 21 professional development units (PDUs) for attending this training, you will also get an opportunity to earn additional PDUs for participating in post-course application work (optional) that can be self-reported. You will get more details of how to participate in this program during the training directly from your instructor.

Learning Objectives:

Upon completion of this training, learners will gain:

- **Next-Generation Insights for Building and Transforming the PMO:** Reevaluate, rethink, and reframe the PMO and portfolio management practices to prepare for the new normal in your business and organization. Gain new perspectives on project management and PMOs for today's turbulent and uncertain world, including how to build strategy-execution capabilities while balancing the need for governance and discipline.
- **DNA of a Successful PMO:** Decode and review the seven core elements and building blocks necessary for a successful PMO based on lessons from leading PMOs around the world.
- **PMO Maturity:** Assess your organization along the PMO continuum and chart a roadmap for improvement and optimization.
- **Agile and Adaptive PMOs:** Identify the necessary elements to transform your PMO into an agile and adaptive PMO to support and integrate appropriate adaptive or hybrid practices.

- **Portfolio Management:** Practice project classification, selection, prioritization, and balancing techniques, and cultivate a portfolio mindset along with roles, responsibilities, and portfolio management challenges as well as lessons learned for effective prioritization and making tough choices.
- **Developing Organizational Change Intelligence:** Review the key organizational change management (OCM) strategies necessary to deal with increasing change and volatility in a post-COVID world.
- **Measuring PMO Value and Results:** Develop a PMO scorecard and dashboard with appropriate metrics to measure PMO value and show results.
- **Tools and Technology:** Review the latest project and portfolio management (PPM) and PMO collaboration tools, implementation issues, and lessons learned.
- **Innovation:** Discuss how the PMO can be designed as a strategy-execution platform that enables continuous learning, resilience, and innovation in a disruptive world.
- **PMO Delight Index (PDI):** Find out how to measure the PMO's customer and stakeholder satisfaction and enhance PMO value with PDI!
- **Action Planning:** Chart a personalized application action plan suited to your organization's needs and get ready for the next normal.

AGENDA, Day 1

- Why do we need a PMO? How can we articulate the need for a PMO?
- Define PMOs and what the purpose of the PMO should be.
- Decode and review the seven elements of the DNA of strategy execution and of a successful PMO.
- Learn how to assess your organization along the PMO maturity continuum.
- Discover how to chart a PMO roadmap that is geared for your particular organizational context.
- Find out what type of PMO framework/model is best suited for your organization.
- Identify key PMO disconnects, issues, and challenges.
- Find out why and how PMOs fail.
- Learn how to recognize the increasing DANCE (Dynamic – Ambiguous – Nonlinear – Complex – Emergent) of today's environment and how it impacts the PMO.
- Find out why there is a need to rethink and reevaluate management and PMO strategies for today's increasingly uncertain environment, especially with the impact of the pandemic.
- See why it is imperative to distinguish between traditional and next-generation approaches and identify the necessary approaches to transform your PMO to an agile and adaptive PMO.
- Gain insight into what the next-generation PMO is and how to build and transform it.

AGENDA, Day 2

- Learn about the seven keys to a successful PMO.
- Find out how to get a better understanding of what the PMO stakeholders want.
- Find a balance between the need for rigor, without the rigidity.
- Learn how to assess your PMO annoyance factor.
- Gain insight into what an agile or adaptive PMO is and how the PMO can support and enable agile.
- Learn about the PMO life cycle and its foundational aspects of designing, building, or transforming PMOs?
- Learn how to determine the appropriate PMO strategy, tactics, and governance for your environment and discuss the PMO life cycle.
- Find out why you need a business model for the PMO and see how to build and align a business case for it.
- See why it is important to have a mission and purpose for the PMO and how you can facilitate and develop it.
- Learn how to identify key PMO customers and stakeholders and their wants and needs.
- Discover how to gain greater buy-in and support for the PMO, and learn how to win over barriers and blockers.
- Learn what the appropriate structure of your PMO should be.
- Learn about the functions of the PMO and how to create/adapt a service catalog for it.
- Discover how to assess resource management, staffing, and budget needs for the PMO.
- Gain insight into what the key deliverables of the PMO should be in the next 6 months.
- Learn how to implement project management communities of practice (CoPs) for ongoing PMO development and fostering a knowledge-sharing and collaborative project culture.
- Gain insight into choosing a good governance framework for the PMO.
- Find out how to assess, review, select, and implement appropriate PPM/PMO tools.

- Learn about what strategy is and how it is the core element of the DNA of the PMO and portfolio management.
- Find out what portfolio management is and how to define/adapt a portfolio management process.
- Learn about effective models, techniques, and tools for project classification, selection, and prioritization.
- Discover how to define, align, manage, optimize, and balance the portfolio and the associated governance, benefits, and challenges of portfolio management.
- Learn about typical portfolio management issues and challenges.

AGENDA, Day 3

- Find out how to develop a comprehensive approach to PMO measurement and metrics focusing on results and PMO value.
- Learn how to define and measure PMO value.
- See how to decode and develop the measurement aspect of the PMO's DNA.
- Find out why it is so hard to measure and show PMO value.
- Learn what value is and how to plan for PMO measurement and value.
- Learn the formula for stakeholder satisfaction.
- See how to select the right measures and decide what should be part of your PMO scorecard.
- Find out why it is crucial for the PMO to understand change and how organizational change management (OCM) is a key element of the PMO's DNA and is necessary for its successful implementation.
- Learn how to develop a PMO change management approach and overall change intelligence (CQ) for your organization.
- Gain insight into next-generation approaches in communications, culture, political, and leadership strategies for successful PMOs.
- Find out how to effectively market, sell, and communicate about your PMO.
- Learn how to embed learning into the PMO's DNA and how to conduct next-generation lessons learned that are effective and impactful.
- Discover how to plan and conduct effective PMO retrospectives.
- Learn how to avoid pitfalls when implementing and sustaining agile PMOs and portfolio management practices.
- See how to chart a personalized application action plan suited to your organization's needs.
- Learn the secrets of successful PMOs.

Professional development units (PDUs) are 1-hour blocks of time spent learning, teaching others, or volunteering. By attending this training, you will be able to achieve the following PDUs as learning hours to apply for PMI certification or to maintain your certification status with PMI. [View](#) how your PDUs align with the PMI Talent Triangle®.

	Technical	Leadership	Strategic	Total
CAPM® / PMP® / PgMP®	7	7	7	21.00
PMI-ACP® / Agile*	0	7	7	14.00
PMI-SP®	0	7	7	14.00
PMI-RMP®	0	7	7	14.00
PfMP®	7	7	7	21.00
PMI-PBA®	0	7	7	14.00

**Please note that the asterisked row above applies to the PMI® Agile Certification Journey and includes DASM™, DASSM™, DAC™, and DAVSC™ certifications.*