What we learned:
- Burn-in time is important
- Environmental changes can shift priorities. (e.g. project portfolio review is not our primary focus at this time)
- Collaborating with the project team is equal in importance to collaborating with customers
- A long process needs a lot of “glue”
- Project leads need a clear understanding of “what’s in it for them”

What we did well:
- Transparency and consensus-building
- Focused on education—made minimal adjustments after the new process launched
- Met needs for: greater divisional input, defining roles, tracking project requests, process agility, etc.
This is what we heard you say…
- Summarized and presented preliminary findings to departmental and senior leadership teams

Purpose this served:
- Demonstrated to staff that we heard them
- Allowed staff to validate their input
- Highlighted other viewpoints
- Provided us with additional feedback opportunities

This is what we think we should do...
- Developed initial recommendations in response to the information presented in our findings
- Presented initial recommendations to departmental leadership teams with a focus on floating ideas and options
- Iterated, then finalized, recommendations based on these conversations

Purpose this served:
- Provided a reality check
- Provided staff with an additional opportunity to contribute to our redesign

Go build it...
- We spent a lot of time on:
  - Documentation
  - Defining roles and responsibilities
  - Developing communication between steps in the new process

...and own it!
- We assigned an owner to each step in the process. Owners were responsible for delivering the best documentation and protocol for that step.

http://www.cmu.edu/computing/ppmo/project-initiation/ongoing-submission-process/

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Project Portfolio Management

Ongoing Submission Process

- Initial Sponsor Approval
- PPMO Consultation
- Senior Architect Consultation
- Final Sponsor Approval
- Open Comment Period
- Resource Consultation
- Pre-Submission Review / Approval
- Resource Review (Project Request Review Team)
- Strategic Review (Senior Management Team)
- Executive Review/Approval
- Approved Projects

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SUMMARIZE
- “This is what we heard you say…”
  - Summarized and presented preliminary findings to departmental and senior leadership teams

Purpose this served:
- Demonstrated to staff that we heard them
- Allowed staff to validate their input
- Highlighted other viewpoints
- Provided us with additional feedback opportunities

ASK
- Conducted one-on-one and group interviews with Sr. Executives and Managers in IT
- Used surveys to gather feedback from project leads and the management team

DEVELOP
Go build it...
- We spent a lot of time on:
  - Documentation
  - Defining roles and responsibilities
  - Developing communication between steps in the new process

...and own it!
- We assigned an owner to each step in the process. Owners were responsible for delivering the best documentation and protocol for that step.

ASSESS
Does it work?
- Assessment mechanism for each step and role in the process

Purpose this served:
- Assessed success criteria
- Identified areas to iteratively improve the process

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MOTIVATION
- Rating Organizational Maturity
- Annual Tactical Planning too slow
- New Portfolio Management Tool
- Team Dynamics