P3O Summary

Roles P3O®s categorise roles into three sections: **Management, Generic, or Functional.**

Management Roles

P3O® Sponsor Purpose:
- To support and guide the implementation and continuing lifecycle processes of the P3O®
- Use strong leadership, management, and authority to establish and continually improve the P3O®

Head of P3O® (Permanent Office) Purpose:
- To set-up and run the permanent office, perhaps taking over the role of portfolio manager as well ⬜ To ensure the integrity of the portfolio and its contents
- Identify any gaps in initiatives to clarify which activities will fill them

Head of Temporary Programme or Project Office Purpose:
- To set-up and run the temporary office
- Identify any gaps in initiatives to clarify which activities will fill them
- Have the ability to deputise for the programme manager

P3O Governance focus
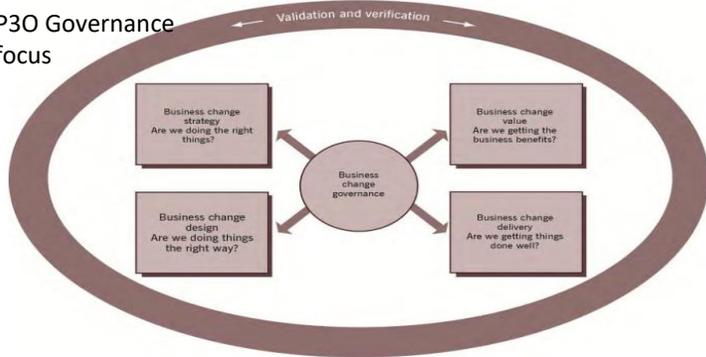
Business Change Strategy Are we doing the right things? Is the business investing in those programmes/projects that make the greatest contribution to achieving corporate strategy? Are they correctly prioritized against each other & BAU?

Business Change Design Are we doing them the right way? Are the programmes/projects (& their outcomes & deliverables aligned with each other, and with the organization's governance, structure & BAU activities? Are we delivering the Programmes/projects in line with the enterprise architecture/business roadmap & in the right order/sequence

Business Change Delivery Are we getting things done consistently & well? Are good & best practice delivery methods & governance structures in place for programme/projects? Are those who are involved in delivering programmes/projects doing so consistently & performing at the required level? Do they have the skills & capability to succeed? Ate the appropriate tools & techniques available?

Business Change Value Are we getting the business benefits? Are the programmes/project delivering the expected contribution to achieving corporate strategy ? Is delivery of the strategy still on track?

Generic Roles

Portfolio Analyst Purpose:
- To facilitate development and management of an optimised portfolio
- Ensure senior management decisions lead to fulfilment of strategic objectives

Programme or Project Specialist Purpose:
- To provide specialist hands on support for programme and project managers
- Promote PPM management methods and standards to implement best practice
- Provide a consultancy service to boards (could be advice centre or have a specific purpose like workshops)
- Work with programme manager and business managers to define governance levels and decide on level of support

Programme/Project Officer Purpose:
- To improve the planning and delivery process, by collecting and maintaining data in consistent form

Functional Roles

Benefits and Value Purpose: A reliable 'fit for purpose' approach to benefits and value management is implemented and applied through the portfolio or programme, and that benefits realisation is enhanced from the organisation's investment in change.

Commercial Purpose To ensure that the organisation carries out the role of 'informed customer', and that all commercial/procurement practices and decisions meet the designated standards and offer the organisation value for its money.

Communications and Stakeholder Engagement Purpose To ensure that the management of the portfolio, programme, or project's stakeholders is effective.

Information Management Purpose To act as the custodian and guardian of all master copies of the portfolio, programme, or project's information. This role should ideally work closely with the security function or department in an organisation in order to confirm that full information and physical security is considered within a portfolio, programme, or project

Consultancy and Performance Management Purpose To offer internal consultancy and expertise in PPM and organisation processes, as well as the monitoring of certain programmes and projects. The services provided are focused on sustaining a minimum set of standards and achieving the target performance. Post holders should seek to continually improve the performance of the portfolio, programme, and projects within an organisation

Finance Purpose To create a professional finance function within the portfolio, programme, or project to ensure the timely provision of funding and effective financial control. This may be a P3O® role, but is more likely to be embedded in the P3O® with formal line management from the finance function.

Issue Purpose The purpose of this role is to take the lead in ensuring that the portfolio, programme, or project has operative processes in place to recognise, monitor, and solve any issues.

Change Control Purpose: To take the lead in ensuring that the portfolio, programme, or project has effective processes in place to identify, monitor, and resolve changes.

Planning and Estimating Purpose: To take charge in facilitating the development and maintenance of the portfolio, programme, or project plan and dependency logs.

Quality Assurance Purpose: To lead the work to ensure that any new products or services delivered by the portfolio, programme, or project are fit for purpose and capable of delivering the benefits required by the organisation board.

Resource Management Purpose: To ensure that current and future programmes and projects are equipped with enough human resources of the right skills, at the right time they are required.

Risk Purpose: To take the lead in making sure that the portfolio, programme, or project has effective processes in place to identify and monitor risks, has access to reliable and up-to-date information about risks, and uses the appropriate controls and actions to deal with risks

**Reporting Purpose:** To provide a reporting service to the portfolio, programme, or project.

Secretariat/Administrator Purpose: To provide portfolio, programme, or project administrative support and a secretariat function for the relevant boards.

Tools Expert Purpose: To provide expertise in the software tools to support the change environment. This provides support to the PPM community to configure software, or to provide training and coaching in its use.

High-level Functions and Services

The many functions and services that the P3O® provides should be able to contribute directly to the outcomes required by the organisation, whilst being based on the business drivers, levels of governance, and customer demands. Although every office may deliver all of their functions and services, they may also have a different functional emphasis: planning, delivery, or COE. Organisation portfolio offices typically focuses on delivery support services, but temporary programme and project offices will focus on delivery support services.
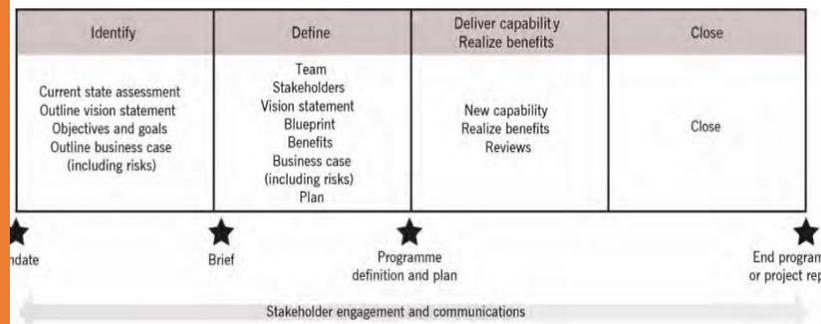
P3O implementation cycle

Identify This process assesses the current state of P3O® provision and identifies the key stakeholders. Outline documentation for the P3O® model is created at this point, including a summary document called a Brief, which require validation by management.

Define This process establishes the team, refines the Vision Statement and the Blueprint. It works on Stakeholder Engagement and delivers an implementation plan. This is all summarised in a Programme Definition Document, which should be validated by management. It also includes developing, modelling, and validating the benefits.

Deliver new capability, and transition and stabilise operations Successful delivery of project outputs that enable benefits within time, cost, and quality restraints is a key aim of implementing P3O®. However, it is vital to ensure the rate of change is bearable by the organisation and ongoing support throughout integration is maintained.

Realising the Benefits Benefits realisation has three stages:
- Pre-transition
- Transition
- Post-transition

Close When a specific programme has been developed to set up a new P3O® capability, formal closure and post-implementation and benefit reviews are essential. This enables making the P3O® capability part of 'business-as-usual' and allows time to reflect

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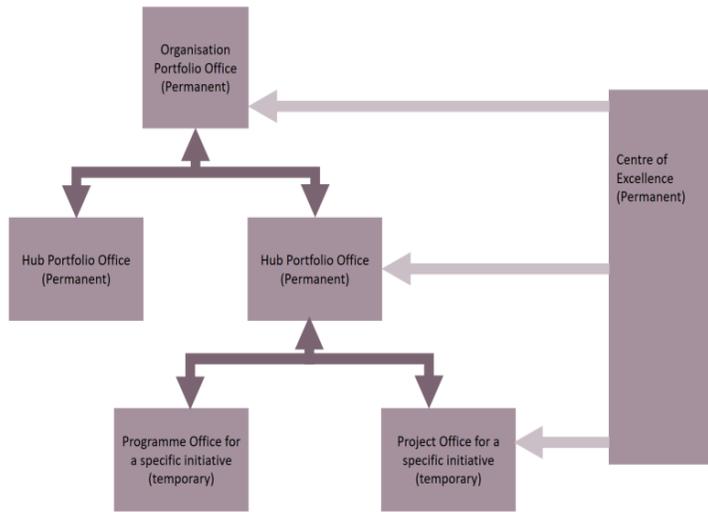
P3O Model Overview

A decision-enabling and support business model for all business change within an organisation.

This includes single or virtual structures, i.e. offices (permanent and/or temporary), providing a mix of central and localised functions and services, and integration with governance arrangement and the wider business such as other corporate support functions. The elements that make up P3O®:
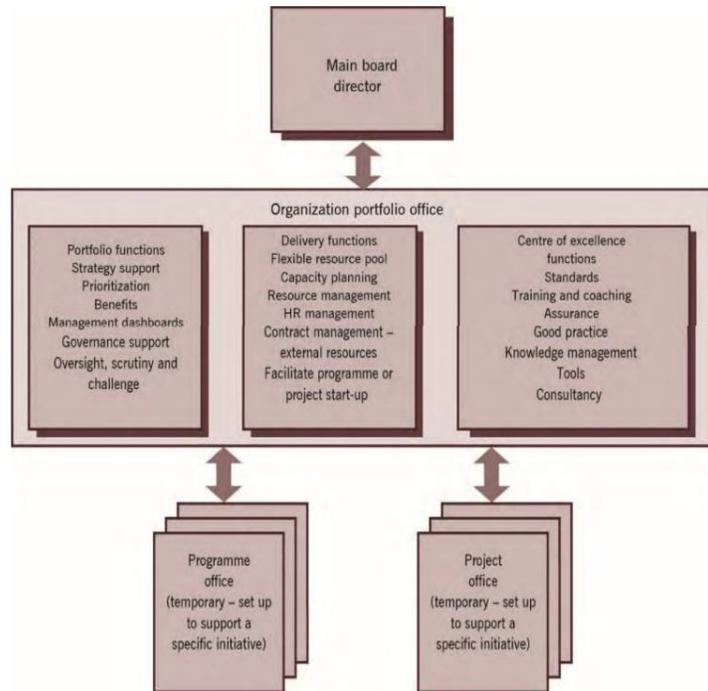
- Organisation Portfolio Office
- Hub Portfolio Office
- Programme Office
- Project Office
- Centre of Excellence
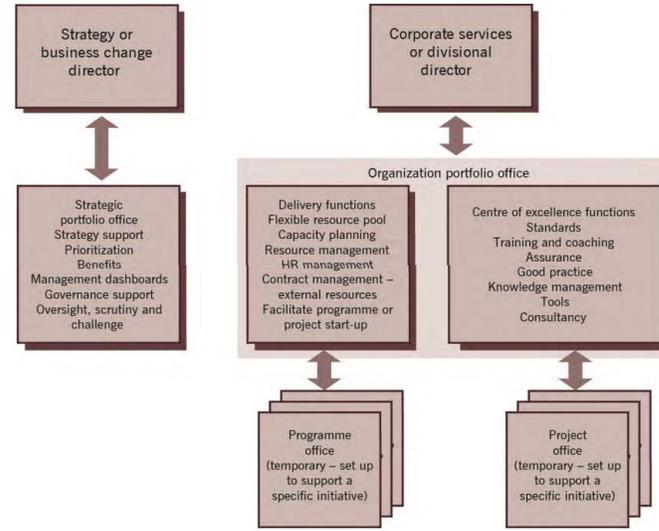
P3O separate strategic portfolio office

This model is often the choice for large, more complex organisations, possibly with a multi-national reach. A geographical spread of sites may necessitate the setting up of separate portfolio offices. Programmes and projects will use the standards and assurances from the corporate COE or the local hub portfolio office, depending on the size and maturity of the organisation. Underlying success factors for hub portfolio offices

- An effective capacity planning and flexible resourcing model
- Availability of good heads of portfolio offices using core standards and methods
- An established head of portfolio/programme offices forum

P3O temporary programme & projects offices

In organisations without an Organisation Portfolio Office or Centre of Excellence, the set-up of the temporary programme/project office will rely on the local business team responsible for the relevant programme or project and the maturity of their approach to PPM and its processes.

Some key requirements are:

- A configuration library
- Guidelines for storage and security of documents
- Tools, including drawing and collaboration tools
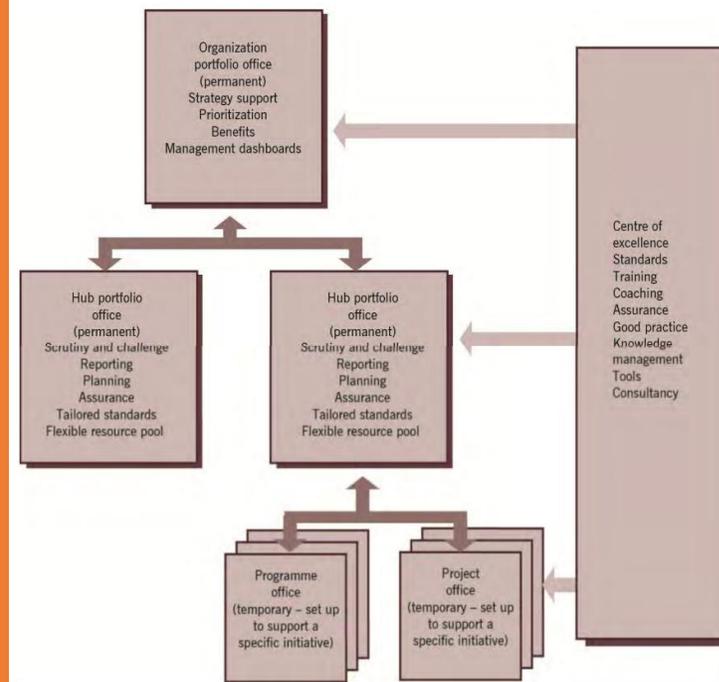
P3O hub & spoke portfolio offices temporary programme

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