

# Portfolio Governance Review

## Final Report

*Prepared for: Jane Doe, CIO, OrganizationX*

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# The PPM Governance Review

Analyze the accountability of project sponsors and approvers.

## Agenda

9:00-9:30	Introductions and Engagement Rationale Review <i>Info-Tech Audit Standard</i>
9:30-10:00	Review Materials for Completeness and High-Level Fit
10:00-10:15	Break
10:15-10:45	Current State Assessment – <i>Audit Standard Triage Tool</i>
10:45-12:00	Review Findings Develop Roadmap Discuss Next Steps

### Info-Tech Insight

The foundation principle for project and portfolio audit involves fiduciary duty: the obligation of management to act responsibly, in the best interest of the shareholder.

*Use this agenda if the service offering is onsite.*

# The PPM Governance Review

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## Agenda

Call 1	Introductions and Engagement Rationale Review <i>Info-Tech Audit Standard</i>
Call 2	Review Materials for Completeness and High-Level Fit
Call 3	Current State Assessment – <i>Audit Standard Triage Tool</i>
Call 4	Review Findings Develop Roadmap Discuss Next Steps

### Info-Tech Insight

The foundation principle for project and portfolio audit involves fiduciary duty: the obligation of management to act responsibly, in the best interest of the shareholder.

*Use this agenda if the service offering is a series of calls.*

# Engagement background

A half-day meeting was held with Fake Name, Fake Title, from OrganizationX on June 15, 1937.

*Counselors:* Update the text on this slide to reflect your client's situation.

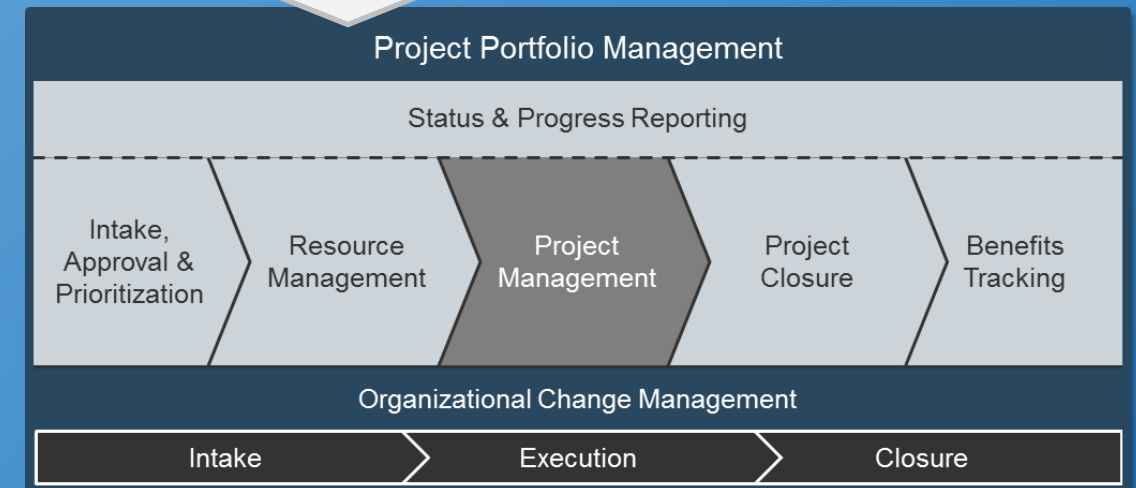
## Engagement Context

- [If you've had previous interactions with this client, quickly highlight those here, as well as other contextual considerations that precipitated this engagement. E.g. "This engagement was part of OrganizationX's ongoing quarterly huddles with Info-Tech. Previous topics have included IT Strategy and Organizational Design."]*

## Engagement Scope

- The focus of this engagement was top-level governance of the IT project portfolio as viewed through the shareholder lens. Simply put, can you show that you were a prudent steward of the resources under your administration? This topic was chosen because *[provide PPM contextual considerations that precipitated this engagement, e.g. "because OrganizationX lacked sufficient visibility into its project portfolio."]*

**Info-Tech's Project Portfolio Management (PPM) framework** is based on extensive research and practical application and complements industry standards such as those offered by PMI and ISACA.



# Key portfolio findings

OrganizationX reports its state of portfolio governance as:

**Recommendations – Though a full portfolio audit is always recommended, these next steps emerge from what is known thus far:**

- Sponsorship**

  - > Continue to get sponsor commitment early
- Execution Oversight**

  - > Maintain clear visibility of project progress
- Spending Authorization**

  - > Identify and address gaps in your resource
- Spending Cessation**

  - > Establish closure checklists early in the pro
- Benefits Attainment**

  - > Ensure that resourcing for benefit attainment prcess is left in place.
- Process**

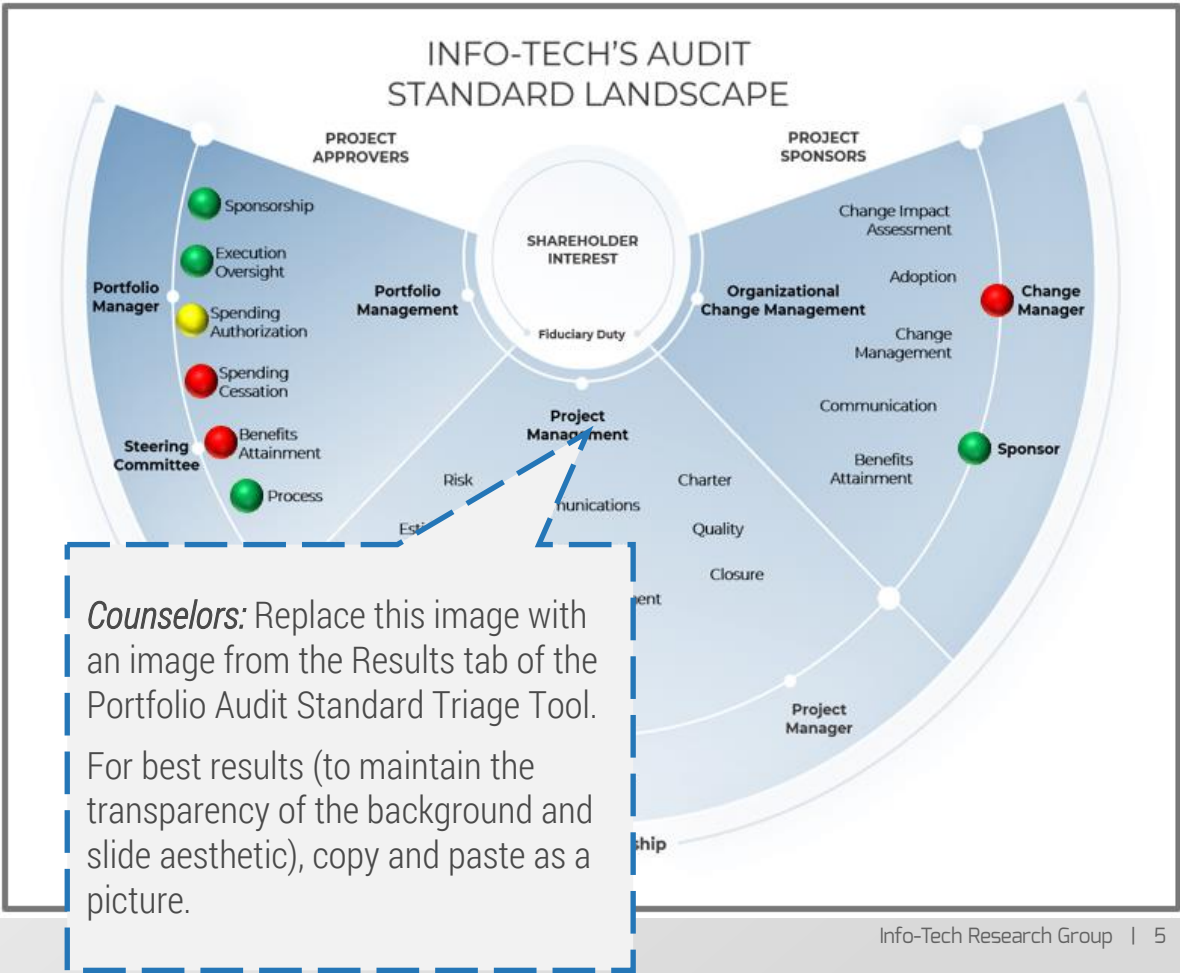
  - > Get leadership commitment to the Audit Standard, or evolve a standard that is more suited to your organization.
- Change Manager**

  - > Keep the sponsor (or designate) overtly involved in all change communications.

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For best results, use Paste with Source Formatting and adjust the width as needed.

## Portfolio Audit Standard Landscape



# Key next step

If OrganizationX only coming out of this huddle optimize its demand processes.

**Counselors:** Come up with one clear next step for the client coming out of the huddle (e.g. book a GI on a specific blueprint, do a specific diagnostic).

- As an immediate next step coming out of this meeting, OrganizationX should book a guided implementation with an analyst from Info-Tech's Project Portfolio Management Team.
- This guided implementation should be booked to go through Info-Tech's blueprint *Optimize Project Intake, Approval, and Prioritization* research.
- This PPM analyst can further scope OrganizationX's next steps to ensure that in a future state, project approvals are better aligned to the available capacity to deliver projects.



## Optimize Project Intake, Approval, and Prioritization

Deliver more projects by giving yourself the voice to say "no" or "not yet" to new projects.

**Counselors:** Use the photo library of related blueprints on slides 7-9 to replace this recommended blueprint with another recommended blueprint.





## Balance Supply and Demand with Realistic Resource Management Practices

Create capacity forecasts that you can stand behind.



## Develop a Project Portfolio Management Strategy

Time is money; spend it wisely.

*Counselors:* Use this photo library of related blueprints to replace the recommended research on the right-hand side of slide 6.

Delete this slide before sending to client.



## Grow Your Own PPM Solution

Organizations use a homegrown PPM solution. Here's a better way to do it.



## Tame the Project Backlog

Take charge of your backlog of unstarted projects.



**Deliver Project Value  
With a Benefits  
Legitimacy Initiative**

## Deliver Project Value With a Benefits Legitimacy Initiative

Ground project benefits in realistic metrics and standards for accountability.



**Establish an Effective IT  
Steering Committee**

## Establish an Effective IT Steering Committee

Have the right people making the right decisions to drive IT success.

*Counselors:* Use this photo library of related blueprints to replace the recommended research on the right-hand side of slide 6.

Delete this slide before sending to client.



**Tailor Project  
Management Processes  
to Fit Your Projects**

## Project Management Processes to Fit Your Projects

Save time managing processes and more time delivering results.



**Refine Your Estimation  
Practices With Top-Down  
Allocations**

## Refine Your Estimation Practices with Top-Down Allocations

Don't let bad estimates ruin good work.





## Define the Right Kind of PMO for Your Organization

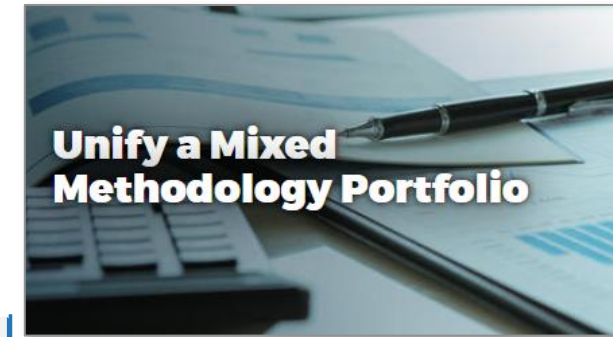
### Define the Right Kind of PMO Organization

Focus on your organization's needs to get value from a PMO.



### IT Staffing Assessment

Make IT a corporate powerhouse by improving your ability to grow, deploy, and manage your team.



## Unify a Mixed Methodology Portfolio

Unify a Mixed Methodology Portfolio portfolio oversight and agility without going old school command and control.



### PPM Current State Scorecard

Take stock of your Project Portfolio Management practices and chart a strategy for success.

*Counselors:* Use this photo library of related blueprints to replace the recommended research on the right-hand side of slide 6.

Delete this slide before sending to client.

The background is a dark blue gradient with several glowing red hexagons of varying sizes and opacities. Some hexagons have smaller red dots inside them. There are also small, faint blue and white particles scattered throughout the scene, giving it a cosmic or digital feel. The overall lighting is soft, with a slight glow from the top left corner.

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