

Business Driven Project Management Office in Organization

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ABSTRACT: Outlines a roadmap for how to set up an effective PMO aligned to and driven by specific needs of the business, Provides new perspectives and views that will challenge PMO managers to reach greater professional heights and gives them the means with which to do so.

Keywords: Project management office; PMO; implementation of PMO; PMO lifetime; challenges of PMO; benefits of PMO

I. INTRODUCTION

The key to having a useful and usable approach for managing projects is to think process, not methodology. In fact, when it comes to words that conjure up mixed emotions, heated debates, and differences of opinions among those involved in the project efforts of a company, there is no word more capable of opening up Pandora's Box than methodology. Methodology can be, and often is, perceived differently by different people. For many people methodology is a good thing. It presents a formalized way to manage projects and it demonstrates a level of project management capability and skill that is an order of magnitude better than the skill associated with managing projects informally and by ad hoc best efforts. For other people, however, methodology is not normally viewed positively. It represents everything that is wrong with organization and bureaucracy and, rather than being a help to project management, it is a hindrance. For some people, methodology is a four letter word. Theoretically project management methodologies are a good thing, but in practice they can be a source of many problems and frustrations. Project management methodologies are not developed with the idea of becoming an evil or a bad thing, but it is true that they usually are or become just that. Take the case of David Cartwright (2007), a technology consultant with expertise in IT infrastructure and applications development. In his article "Why I Bloody Hate Formal Methodologies," Cartwright pens an amusing rant and rave and cites one example after another as to why he hates formal methodologies.

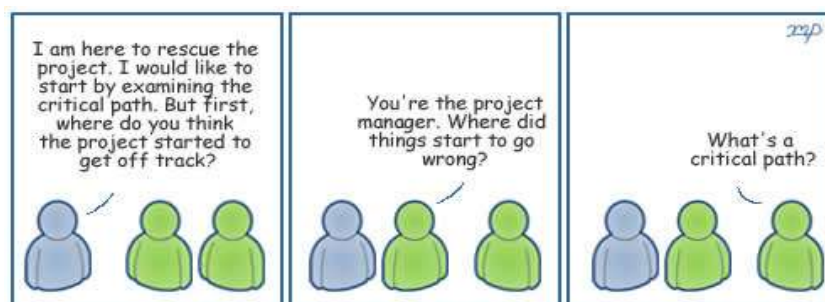


Figure 1: PMO comics—complex project management

Making his list are some of the inevitable by products of formal methodologies. One such by-product comes in the form of certification requirements for the methodology. As an example, Cartwright discusses the PRINCE2 certification and requirement for PRINCE2 practitioners to pass a three-hour, open-book, essay-type exam. As Cartwright puts it, ". . . I can just about contemplate there being a modicum of value where any idiot can be set up as a trainer, because at least you have to pass an exam—though you can take your book with you." Cartwright goes on to reveal that even the experts point out that not all aspects of the methodology, in this case PRINCE2, is applicable to every project and that one cannot take for granted that the blind application of the methodology results in a successful project. Nonetheless, according to Cartwright, qualified professionals

without a certification in the methodology have missed out on job opportunities and employers seeking to hire only certified practitioners have missed out on quality candidates.

It is a mistake to think that such opinions on project management methodology as Cartwright’s are lone voices in the woods. In response to Cartwright’s article, Andy Reed comments, “. . . Dave is right in that once the industry loses sight of the real objectives and gets bogged down in the methodology itself then we have a recipe for disaster. I recall one project in which I gave up trying to correct the Project Initiation Document that had been put together by the Project Manager (all 97 pages of it) when it became apparent that doing so would take longer than the project itself.”

And in another reply to Cartwright’s article, Mark (last name withheld) comments, “I have witnessed meetings where the assorted gathering flew into a flurry of Prince2 code talk trying to one up each other with their use of the notation. Despite scarily understanding the piffle they were spouting, when asked for my input on project delivery I had to tell them all to speak bloody English and do something, anything, to actually move towards delivering results.”

Ramon Padilla (2005) coined the term M&Ms to describe those folks in IT departments and project management offices (PMOs) who have decided, for whatever reasons, that the methodology is an end unto itself and drives the work. Unlike the chocolatey goodness in the form of those little candies that melt in your mouth not in your hands, this M&M refers to mired in methodology and it is anything but goodness. Padilla writes, “So the organization adopts a project management framework designed to launch the space shuttle and then requires all its projects to fit this framework, both large and small—failing to realize that your project management methodology needs to scale with the size of your project.” What Padilla and others see first-hand is that project management methodologies such as these do not guarantee project success, only that the project takes forever to complete.

Cartwright, Padilla, and many others are all too aware of the impact, often negative, that methodology-oriented thinking has on PMOs and those managing projects. But how do we define this problem in terms that we can understand and fix as opposed to simply having one example after another as to why formal methodologies are a bad thing? As is often the case with complex problems, it is helpful to define and address key areas that contribute to the problem. In the case of project management methodology, three areas that quickly stand out are mindset, technology, and economics.

Mindset:

Mindsets are often the result of past experiences such as observing, learning, or doing. Few people have a mindset for things that they have no awareness of and, conversely, most people quickly develop a mindset for things that they confront each and every day. In theory a methodology-oriented mindset is thought of by many people as a good thing to possess. But in practice a methodology-oriented mindset, even when well-intended, can have a negative impact on the PMO and all those involved in projects. Some of the many differences between a methodology-oriented mindset and a process-oriented mindset are shown in Figure 8.

Methods-Based vs Outcomes-Based

One of the greatest differences between a methodology-oriented mindset and a process-oriented mindset is the core attitudinal basis of thinking. For those with a methodology-oriented mindset, this core basis of thinking is centered on methods to be used and rules to be followed. Merriam-Webster’s online dictionary defines methodology as "a body of methods, rules, and postulates employed by a discipline" and this aptly describes a methodology-oriented PMO. The focus is placed on the methods as an end rather than as a means. In a process-oriented mindset, on the other hand, the core basis of thinking is always centered on the outcome. As defined in Merriam-Webster’s online dictionary, a process is "a series of actions or operations conducting to an end." Those with a process-oriented mindset put the achievement of the outcome first and construct the requisite processes to ensure the outcome.

Methodology vs process-oriented mindset	
Methodology-oriented	Process-oriented
Methods based	Outcome based
Seldom end-to-end	Typically end-to-end
The what of the what is to be done	The “who, what, where, when and why” of the what is to be done
Project “document” focused	Product of the project focused
Based upon standards	Based upon business needs
Driven by project reporting	Driven by project delivery
Seldom updated	Continuously updated
Methodology integrated into tools	Tools integrated into process
Original author often not known	Process owners clearly identified
Promotes bureaucracy	Promotes a culture of improvement
Think process, not methodology	

Figure 8: Methodology vs process-oriented mindset

Seldom End-to-End vs Typically End-to-End

Traditionally, methodologies do not address the complete end-to-end work effort that an organization such as a PMO must undertake to select a project, deliver the product of the project, and to perform the post-project activities required to ensure continued improvement. Methodologies typically address the project work, starting with the project charter document and ending with some kind of end-of-project document such as lessons learned. Depending upon the phases of the methodology, this starting point takes place in the first phase of the project methodology and the ending point occurs in the last phase of the project methodology such as the initiating and closing phases of the PMBOK® initiating, planning, executing, controlling, and closing (IPECC) processes. In theory this might sound like the correct place to start and end, but in reality the actual starting point for a project occurs well before the project charter and the ending point isn't reached just because the project work has been completed. For example, long before the project charter document is created, an event happens in the organization that compels someone to believe in and act upon a project idea. Such an event can be strategic planning, an operational assessment, a competitive win or loss review, a customer or employee satisfaction survey, a trouble ticket or a helpdesk call. Possibilities for new project ideas are endless. The starting point for a project isn't the point in time at which the project charter is created; it is the point in time at which the idea for a project is implemented (see Figure 9).

Likewise, at the end of the project, there is more to do than to document lessons learned. Post project activities such as classifying and archiving project artifacts for access and potential reuse by others, updating the PMO's historical estimating database with updated types and values, preparation and presentation of continuous improvement recommendations to the PMO, and other management as appropriate and, in some cases, post-project benchmarking and audit of the product of the project benefits.

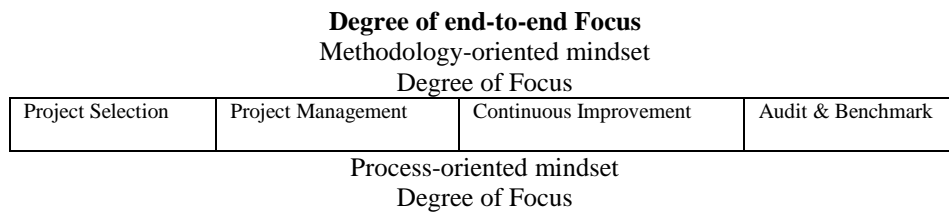


Figure 9: Degree of end-to-end focus

Who, What, Where, When, and Why

Typically most project management methodologies document only the *what* of the what is to be done. Rarely do they address the what, where, when, and why as well. Hence, methodologies are like a cookbook that tells you how to make eggs. Processes, on the other hand, are focused on the outcome; they tell you how to make breakfast. There is no better example to illustrate this point than to share a little story with you about my dear mother. My mother, who passed away years ago, was a perfectionist. According to her there were two ways to do any task; her way and the wrong way. As a graduate in home economics from the Mississippi State College for Women, my mother was an expert in managing all aspects of the household and especially in managing the kitchen. I would say cooking, but that would only be a part of the overall work effort in preparing a meal.

In my mom's later life when she was unable to cook, she enjoyed asking her visiting children to make the meals, especially breakfast. You see to my mom, breakfast isn't a simple matter of frying a few eggs sunny-side up; rather it is a production that must be carried out according to plan. For example, every activity must be done and, at the right time. This might seem trivial, but there is much more than meets the eye if you want to succeed.

How would you go about making bacon, eggs, toast, and coffee? If you are like me, you wouldn't give it much thought. You would just do it. But in my mom's kitchen and with her watching, this is what was expected. First you wash your hands. Then you turn the stove on high and start cooking the bacon. While it cooks you make the coffee. Once the bacon begins to fry, you turn down the heat just a bit to achieve that more than chewy but not too crisp texture. While the bacon finishes, you set the table. This involves laying the tablecloth and placing the special breakfast plates on the table with the napkin on the left side of the plate.

Next the forks go on top of the napkin, the knives are placed to the right of the plate with the cutting edge faced inward, and the spoons are placed to the right of the knives. Of course, such items as salt and pepper and jellies and jams are placed on the table. The cooked bacon is placed on paper towels on a plate to absorb the grease and, after draining some of the bacon grease from the frying pan, the eggs are cooked.

While the eggs are cooking, thin slices of butter are cut and put on the butter dish and placed on the kitchen table where the butter can soften. After the eggs are turned, the toast is placed in the toaster so that it pops out at the same time that the eggs are ready. Cold toast just won't do.

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When the eggs are finished, eggs and bacon are placed on the serving platter and put on the table. Likewise the bread is placed in the breadbasket and put on the table. Breakfast is announced, coffee is served, and everyone enjoys the first meal of the day.

But don't think for one minute that breakfast is over. When it comes to making breakfast for your mom in her own kitchen, it is not over until everything that needs to be cleaned has been cleaned and everything that needs to be put away has been put away, and in the right place I might add.

Now this might sound overly detailed, bureaucratic, or even draconian, but it isn't; not by a long shot. When it comes to making breakfast for the woman who brought you into the world, who raised you, who loved you unconditionally, and who is now in her last years, you do anything to please her. No detail, if it is important to her, is too small to tend to. Anything less would be disrespectful or, as my mom would say, *déclassé*, her special euphemism for a behavior or an attitude that was not up to her standards.

The difference between cooking eggs and making breakfast for your mom in her own kitchen is the difference between methodology-oriented thinking and process-oriented thinking. As process improvement guru Michael Wood (2000) puts it, "Any methodology worth its weight in salt seeks to harvest the wealth of knowledge that exists within the minds of those who actually do the work." Those with a process-oriented mindset incorporate any and all things useful and usable that facilitates the achievement of the desired outcome.

Project Document vs Product of the Project-Focused

Many critics of project management methodology complain that they are more focused on producing documents than they are on producing the product of the project. As project management subject matter expert Andrew Makar (2008) points out in "Too Many Templates," project managers often spend more time producing and updating project documents than they do managing the day-to-day risks, issues, and schedule delays. Makar points out that there are always a critical set of documents. Hence, the issue isn't the fact that there is a need to perform administrative tasks, rather that there needs to be a mindset that is open to and focused on streamlining the process and eliminating nonvalue-added documentation.

In addition to project management subject matter experts, noted experts, including Scott Ambler in Agile software development, are quick to concede the value and importance of project documentation, but that effective documentation should be concise and focused on capturing the minimal, critical information required. However, too many templates and too much template detail are the opposite of this and prove to be ineffective. Ambler (2007) writes, "There is no solid relationship between project success and writing comprehensive documents, and in fact it is more likely that the more documentation you write the greater the chance of project failure." The wise advice of Andrew Makar and Scott Ambler, among others, is an example of process-oriented as opposed to methodology-oriented thinking.

Standards vs Business Needs-Based

When it comes to creating the project management methodology for the PMO, those with a methodology-oriented mindset are often too quick to adopt and document an out-of-the-box standard as the organization's approach for managing projects, as opposed to employing that standard to create an optimized and streamlined process for managing projects. For example, it is not uncommon to find that many PMOs have a project management methodology that is directly aligned to the Project Management Institute's *Guide to the Project Management Body of Knowledge* (PMBOK® Guide). Such a project management methodology no doubt includes the five project management process groups (initiating, planning, executing, monitoring and controlling, and executing), the nine areas of knowledge (integration, scope, time, cost, quality, resources, communications, risk, and procurement), and the associated forty-two processes that fall into these groups and knowledge areas.

In theory this seems like a good approach. But in reality does this kind of a project management methodology meet the needs of the business? Does it work for projects of different types and sizes? Are all of these distinct processes mandatory or can some of them be combined or even omitted? Does the methodology tell you such things as what tools to use or are available for different tasks? Does it provide contextual guidance, advice, and information for carrying out the prescribed tasks? Does it tell you where you can find example project artifacts similar to your project, or task estimates applicable to your project tasks? Does it tell you how to go about project administration, frequency of producing project performance updates, which techniques such as earned-value analysis or simpler techniques can be used relative to the complexity of the project? Does it tell you where to store your project documents and when and how to update project team members and project stakeholders.

Project management approaches created with a methodology-oriented mindset typically do not answer these questions; rather their focus is primarily on aligning to standards. However, approaches for project management

that are created from a process-oriented mindset do answer these questions. By design, they focus on the needs of the business and seek to employ, optimize, and streamline available standards.

Project Reporting vs Project Delivery-Driven

PMOs of all shapes and sizes, inherently, do some amount of project reporting. In many cases, larger PMOs with a greater number of projects have a business need to do more reporting and management of the portfolio than smaller PMOs with fewer projects and complexity. This can often lead to a project reporting mindset instead of a project delivery mindset.

As noted by PMO subject matter expert John Filicetti (2006) “The focus on project management lacks the urgency of inertia and ‘getting it done!’” Filicetti, like many other PMO experts, recognizes that project reporting can easily become the core focus of a PMO. To no discredit of any PMO, project reporting is essential and the need for it only increases as the PMO becomes more strategic, more visible, and more in demand by its constituents.

PMO thought leaders Kendall and Rollins (2003, pp. 44, 80) take the need for the PMO to have a project delivery mindset even further suggesting a deliver now PMO model in which emphasis is placed on delivering measureable value to the executive team within each six month period. For some PMOs, especially strategic and advanced PMOs, the focus on project delivery can be a model unto itself. It would be a mistake, however, to suggest that a project delivery mindset is a mindset reserved and applicable to only advanced PMOs or that a PMO must align itself to a specific model to achieve a project delivery mindset.

As shown in Figure 10, all PMOs can take measures to increase their focus on project delivery. Two measures to consider include creating a sense of urgency to deliver the project and establishing project delivery behaviours. The sense of urgency includes not only the focused placed on delivering the project, but also the much needed focus for the PMO to show results to management and the leadership team period by period. For large PMOs this period could be six months; for smaller PMOs this period could be quarterly. A project does not necessarily have to be long or complex to be a value to the organization.

Project reporting vs project delivery mindset				
Delivery				Deliver PMO
Mindset			Enterprise PMO	
Reporting		Coach style PMO		
	Repository style PMO			
	Low			High
		PMO Value		

Figure 10: Project reporting vs project-delivery mindset

Project delivery behaviours are no doubt the same behaviours found in any sound project management approach, but a heightened importance is placed on them to ensure an understanding of their importance and overall effect on the ability to deliver a project. Such project delivery behaviours include:

- Ensuring that a good project plan exists
- Ensuring that the project participants are committed to the project plan
- Ensuring that the project participants have the ability to carry out their assigned tasks Ensuring that risks are considered and contingency plans are put in place
- Ensuring that the critical path for the project is identified and understood
- Ensuring that communications and progress reporting, commensurate with the needs of the project, are in place
- Ensuring that problem and issue tracking is performed and that escalation routes are in place Ensuring that appropriate management is involved and committed to the project

All PMOs can benefit from focusing on project delivery.

Repository model PMOs that exist to provide methods and tools to the enterprise business groups performing projects can drive a project delivery mindset. The fact that the enterprise has chosen a business-centric project ownership approach does not prohibit, or limit by policy, the PMO’s ability to establish a project-driven mindset and a deliver-now sense of urgency.

Coach model PMOs are often an extension of the repository model and they too can extend their coaching to specific project delivery tactics and activities for both project managers and the functional business

heads. Enterprise model PMOs play a major role in the organization and often represent a high degree of investment made by the organization.

Enterprise PMOs inherently move to a project-delivery mindset on account of the project and portfolio management processes and strategic alignment activities that is manifest in their mission. Of course with the scale and complexities of enterprise project management there can frequently be a continual *putting out forest fires effort* and effect with respect to project and resource management. This naturally can interfere with a PMO's ability to stay focused on delivering measurable value by each six month period.

Deliver-now PMO models are, of course, maniacally focused on project delivery to the point of subjugating processes and methods to maximize benefit delivery.

While some PMOs might be able to evolve from one of these PMO models to the next, for many PMOs this is not possible nor a good idea as it should be the needs of the business that drive the PMO model rather than the desire by those in the PMO to pursue personal interests and preferences. But what all PMOs, not just strategic and advanced PMOs, can and should do is to seek to establish the mindset and behaviours for project delivery as a key part of the PMO's project management process. Rather than a methodology-oriented mindset that tends to focus on reporting, a process-oriented mindset enables the PMO to instil a project delivery mindset that is focused on increasing benefit delivery, as derived from the product of the project to the customers of the PMO, as well as increasing the recognized value of the PMO.

Seldom vs Continuously Updated

Perhaps one of the least desired attributes seen in PMOs with a methodology-oriented mindset is the infrequency of updating the project management methodology of the PMO. Those with a methodology-oriented mindset go about producing a lengthy, overly detailed methodology document. Such works might be formally titled, "The Project Management Methodology (PMM)" or "The Solution Delivery Methodology (SDM)" and frequently they are posted in Print Document Format (PDF) on the IT intranet where they can be found, printed, and stuffed into large, three-ring binders. Seldom are these lengthy documents updated and if even they were updated, users would likely have no way of knowing what areas had been changed.

Additionally the effort to produce the document, though well intended, was likely an assignment that was given to the poor individual who was the least busy at the time. Therefore, there is no visible or real ownership of the methodology document or commitment to keep it updated. In fact, in many cases, the PMO or IT department might have contracted with a third-party consultant to write the project management methodology.

This can be problematic on its own as observed by Fortune 500 management consultant Allen Eskelin (2008), "Consultants will not have the experience delivering projects within the organization so the industry best practice may not be the best practice for the organization." Hence, its usefulness and longevity of purpose quickly decreases as time passes and eventually there comes a point in time in which the methodology is so out of date that it needs to be completely rewritten. Of course the rewrite is contracted out to a different consulting firm, the existing methodology is thrown out in its entirety and the new, and hopefully improved, methodology is developed from scratch.

Australian project management expert Neville Turbit (2004) advises that "A methodology is not a series of templates. It is a process that needs to be adapted to suit each situation. Feedback is also important. The methodology will not stand still. It will evolve and become more applicable to the organization. As such, there needs to be a mechanism in place to cater for 'learning from experience.'"

What Turbit and many other experts in project management understand is that a project management process is not a set of static, unchanging documents; rather it is a living and managed process resource, a best practice framework, which requires as well as enables constant care-taking and improvement. Figure 11 illustrates that methodology-oriented approaches such as static methodology documents only offer an initial value and are short-lived, whereas process-oriented approaches evolve with usage and offer lasting value.

Seldom updated methodologies quickly become of minimal usefulness and value. As the PMO undertakes project management training, whatever topics are presented and skills are learned do not make it into the methodology. As the PMO performs projects and makes discoveries in the form of lessons learned, these improvement opportunities are invisible to the static methodology. As the PMO implements new tools and new processes and sub-processes, the methodology becomes even more out of date and irrelevant. And as the PMO and leadership team make changes to strategy and policy, the static methodology is so entirely out of date that a complete refresh and rewrite is required.

			Frequency update		
High					Strategy
				New Tool New Processes	Process
			Lessons Learned		
Value			Training Process	Process	
		Process			
		Methodology			Methodology
			Methodology		
	Ad hoc			Methodology	
Low	Not defined	Defined	Improved Time	Maintained	Refreshed
	Processes are continuously improved and add value; methodologies are seldom updated and become inconsequential				

Figure 11: Frequency of update

Process-oriented frameworks for project management, on the other hand, do not become outdated. Unlike static methodologies that are seldom updated, process-oriented frameworks, by design, are collaborative and frequently updated. As the highly regarded CEO of PM Solutions, Kent Crawford (2002, p. 76) advises, “Building a world-class set of processes and methodologies also involves taking advantage of the lessons your own project managers learn while engaged in projects.” Lessons learned documents do not get filed away and forgotten as is the case with static methodologies; rather they get acted upon and applied to the process framework.

Likewise, investments in training are applied to the process framework and institutionalized throughout the PMO, which enables skills to be retained and everyone to benefit from the training investment, not just those in attendance. While new tools are implemented, the process framework is updated to reflect both the availability of the tools and the contextual use of the tool related to the PMOs processes and policies. As the PMO and the leadership team develop and implement strategy, the process framework is refreshed with the updated and new processes, policies, and metrics.

Although methodology-oriented thinking stops at the production documents that are rarely updated, process-oriented thinking only begins its journey at that point with frequent updating points along the way. Continuous improvement is perhaps one of the most significant differences between the methodology-oriented mindset that produces static documents and the process-oriented mindset that provides a managed framework and it offers a compelling reason for PMOs to adopt a process-oriented mindset in the form of longevity of use and value.

Methodology Integrated into Tools vs Tools Integrated into Process

Most PMOs recognize that tools should be integrated into your processes and not the other way around. When tools are integrated into the process framework of the PMO, the end result is a useful project management process that provides not just the what of the what is to be done, but all of the details surrounding the who, what, where, when, and why of the project work to be completed. However, there are those who advocate an approach of integrating the project management methodology of the PMO into a single project management tool or system. Although this approach might sound like a good idea, nearly always it is not.

Take the case of the PMO that chose to integrate its project management methodology into a tool. In this instance the tool was Microsoft Project. Considerable thought and effort was taken to develop an all-encompassing Microsoft Project template that provided a complete ready-to-use work breakdown structure for a new project. Each phase and step of the project management methodology was shown in a traditional work breakdown structure hierarchy. For each step of the methodology, project document templates were listed and hyperlinked as lower level tasks for the step and task notes were attached to each work breakdown structure to provide the guidance for the project management methodology. For months the PMO struggled with this approach:

- The tool imbedded project management methodology was too rigid. There was no flexibility to allow for projects of different sizes and types. Whether the project effort was an IT infrastructure project— upgrading the servers, a major software development project, implementing an enterprise resource planning (ERP) system, or a minor software maintenance project, applying a new release, each project was subjected to exactly the same inflexible project management methodology.
- Not all of the methodology phase, steps, and templates were applicable to the projects of the PMO. Hence, a first order of business for the project manager was to carefully think about and delete tasks, sometimes

entire blocks, of the Microsoft Project work breakdown structure. This, in essence, resulted in each project manager creating and using his/her own version of a methodology for the project.

- The PMO quickly discovered that all of the project work was not necessarily performed within the functional boundaries of Microsoft Project.
- As shown in Figure 12, unless the project manager had Microsoft Project, he/she could not access the project management methodology. While this did not seem to be a problem because all of the project managers in the PMO used Microsoft Project, a per-user licensed and installed application, many members of the project team did not. Therefore, it was not cost effective or even a consideration to roll out Microsoft Project to every project team member or potential project team member.
- As the PMO evolved, matured, and began to establish additional PMO processes, sub-processes, policies, and metrics, it was simply not possible to incorporate these items into the tool imbedded project management methodology or share them in any meaningful way.
- When the project management tool changes, the tool imbedded methodology is lost and has to be rewritten and reintegrated into yet another tool.

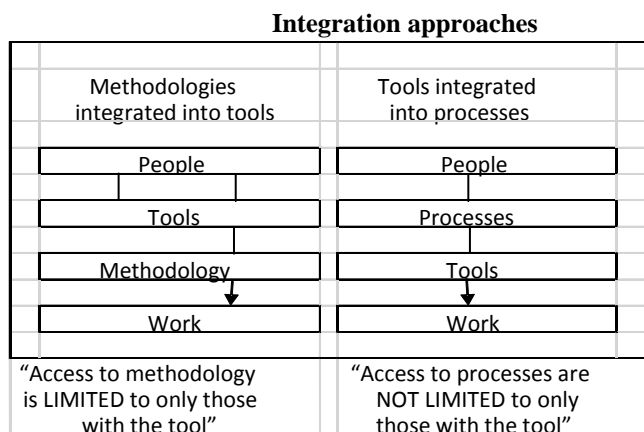


Figure 12: Integration approaches

Once again, where methodology-oriented mindsets are too focused on just the methods, a process-oriented mindset leads to the integration of all things useful and usable into the project management process. This includes tools and applications whether the preferred project management tool of the PMO is Microsoft Project or a high-end project portfolio management system. In fact the many disadvantages of imbedding a project management methodology only increase and become more problematic with higher-end project management applications. Additionally, complexity increases as the number of projects the PMO undertakes increases, their corresponding types and sizes vary, and the number of people who are served by and become constituents of the PMO grows.

Original Author not known vs Processes Owners Clearly Identified

Every IT department and PMO has some kind of project management methodology or systems development life cycle (SDLC) model. Many have more than one. Years back, such documents were hand written and submitted to the word processing center where they were typed and placed in a three-ring binder. It was not uncommon to have multiple authors and contributors to the methodology document, each with their own set of pages. But rarely was there a document owner or owner of the methodology. Methodology documents were nearly always a point-in-time effort to produce the requisite number of hardcopy manuals. With the passage of time and the normal changes that all organizations experience, these cobbled together methodology documents often outlived their original authors.

The fact that these documents no longer have a known author presents two problems. First, with no known author it is unlikely that the content contained within the document, such as the project management methodology or the SDLC, will ever be updated. Second, and more problematic, is the fact that the document was likely to have been written with no appreciable consideration given to, or importance placed upon, the real need for the document to be maintained, updated, and revised over time and as necessary in anticipation of all of the component parts that make up a methodology. This is typically not in the thinking of those with a methodology-oriented mindset and is evidenced by the fact that not one major methodology has any concept or mention of owners, neither for methodology steps or phases nor for the project management methodology in general. Even the PMI Guide to the PMBOK® fails to address this in any meaningful way.

Conversely, those with a process-oriented mindset intrinsically recognize that a process without an owner does not stay a process for long. Process centric PMO methodologies clearly identify who the owner of the process is and process ownership down to the process step level.

Process owners are critically important. For small PMOs, the process owner is likely to be the PMO manager for the entire project management methodology. For larger PMOs, process ownership can be delegated to specific owners, perhaps a member of the PMO team, for a particular process or even one process step. For the smallest of organizations—a one person virtual PMO—ownership of the process can be the responsibility of the manager or care-taker of the virtual PMO or assigned to a subject matter expert.

Among other roles, process owners have four key duties:

- The process owner has the responsibility for the care-taking of the process. This involves ensuring that the content of the process such as workflows, templates and checklists, guidance, and information are all documented and described at an appropriate level of detail for the PMO.
- The process owner, in addition to content, makes available any and all tools, applications, and platforms that are used as part of the work effort. Outputs of the process need to be contextually listed and described and, ideally and if possible, made accessible via hyperlink interfaces or application integration.
- The process owner needs to be available, within a prompt and reasonable timeframe, to answer any questions that those adhering to the process might have. Of course the process owner does not do the work associated with a process step, such as completing a project charter in the initiating process, but the process owner can be of assistance and value by answering any questions that those performing the work might have.
- The process owner has the duty of ensuring that the process is continuously updated and improved. Improvement opportunities such as lessons learned, development of new best practices, rollout of new tools, and incorporation of project management training via tips and techniques cannot resonate throughout the organization until such time as they have been incorporated into the project management process. At this point behaviours and skills can be institutionalized throughout the organization and counted upon, rather than merely hoped for.

For those PMOs with a methodology-oriented mindset, it is common to see little attention or regard, if any, for the original author of the methodology and the concept of ownership of the methodology likely does not exist. By way of comparison, for those PMOs with a process-oriented mindset, process owners are clearly identified and provide a significant value to all those involved in the projects of the PMO.

Promotes Bureaucracy vs a Culture of Continuous Improvement

To many people, a PMO can be perceived to be a bureaucratic organization. To no discredit of those not well-versed in project management as a discipline, many of the early PMO models were centered on control and documentation. In fact the once popular organizational term, project management community of practice (PMCoP), has all but been abandoned in the jargon of today's PMOs. This term is perceived to have a connotation that creates a vision of a policing organization rather than a value-providing organization. According to project management expert David Carr (2008) "Project management is a necessary service to be provided for all but the smallest of projects. The curse of the inexperienced project manager is that he/she believes that his/her goal is to bombard the customer and the project team with mountains of paperwork equivalent to a small forest."

One of the common difficulties that those with a methodology-oriented mindset have is that they view the project management methodology of the PMO to be a voluminous work that provides the definitive approach to be taken for managing a project regardless of its shape or size. Typically, such ones hoe-fits-all methodologies are written to the level of detail required for the largest and most complex of projects. Sometimes there is the ability to pick and choose areas of the methodology to use based upon project type and size guidelines, but frequently it is inflexible.

As IT and project management veteran Vernon Riley (2008) cautions, "The size and scope of some of the methods can give rise to serious issues as the project manager seeks to decide which elements from the methodology can be treated as optional and tries to downscale the approach to smaller projects." Even when there is a sympathetic understanding that the project management methodology might not be especially well-suited or fitted for smaller projects, it is up to each project manager to determine how best to make use of it. The tendency to set up a complex, overly detailed project management methodology is a bit ironic and further compounded by the fact that for most PMOs, large projects represent a small population of the project mix. As is the case with so many units of measure, Pareto's Principle, the 80/20 rule, applies to the project mix of the PMO in which the truly large, complex projects represent 20 percent, and often much less, of the total projects of the PMO.

So how does the PMO address the need for flexibility in project management? For many PMOs, the answer is that they don't. As project management expert Duncan Haughey (2008) warns, "My worst experiences have been with organizations that stick blindly to the methodology regardless of whether it adds value. This leads to many methodologies being perceived as needlessly bureaucratic . . . Organizations should ensure that project managers aren't overburdened with process that doesn't add value, just for the sake of adhering to a certain methodology."

Though all project managers who have managed more than one project recognize flexibility as a much needed good thing, surprisingly many noted experts advocate singular positions and rigid approaches that are difficult to understand. For example, in the 7th edition of his definitive text on project management Harold Kerzner (2001, p. 84) writes "When a company feels the need to have multiple methodologies, time is wasted up front arguing on which methodology to use." It is difficult to tell which is more unbelievable; that a noted expert could have such a mindset or that any organization would spend more than an ounce of time considering which methodology to employ.

For example, let's take the case of a health industry PMO located in Tampa. This is a well-known and well-managed company that most people recognize. This PMO has a generic project management methodology aligned to the PMI Guide to the PMBOK® that is used for generic projects, a Waterfall-centric SDLC for large software development projects and an Agile Scrum methodology that is used by the application development team in support of the company's online customer portal.

There is no doubt among any of the project managers, the project team members, or the functional managers of the organization as to which methodology is to be used. If any arguments take place, it is likely because someone comes in and mandates that all groups must use the same methodology.

Can you possibly imagine the ire of the Agile Scrum team, accustomed to their thirty-day sprints and Scrum process, being told that they must stop what they are doing and follow the generic PMBOK® aligned project management process?

Can you envision the consternation of the IT project manager with the assignment to the server upgrade project being told that, instead of following his generic PMBOK® aligned project management process, he must now learn and apply the Agile Scrum process to his project effort?

Can you fathom the disbelief of the ERP project manager consultant being told to abandon the application specific SDLC process in order to comply with the whimsical thinking that a PMO should have only a singular methodology. Such a prescription would be unbelievable.

Regrettably, this kind of methodology-oriented thinking doesn't stop there. In his book on project management maturity Kerzner (2001, pp. 77, 82) writes "Level 3 is the level in which the organization recognizes that synergism and process control can best be achieved through the development of a singular methodology rather than using multiple methodologies." He adds "The development of project management methodologies at level 2 are based upon rigid policies and procedures. But in level 3, with a singular methodology based more upon informal project management, methodologies are written in the format of general guidelines and checklists."

This is erroneous. First, it is bureaucratic thinking. There is no real control in having a complex, rigid methodology that, at the end of the day, no one follows. Second, without consideration for projects of different sizes and types within the PMO, optimization of the methodologies to best fit the best practice and associated domain knowledge, not to mention potential areas of required compliance, the best that a one shoe fits all sizes, singular methodology could ever be would be the lowest form of dominator of the collective, and summarily dismissed, unique methodologies.

Should an organization have an unlimited number of methodologies? Of course not. No two PMOs are the same, but somewhere between one and too many is the correct number of distinct approaches for project management that the organization needs.

Kerzner's contentions that Level 2 methodologies need to be rigid and Level 3 methodologies need to be informal are both wrong. Methodologies, whatever the level, should never be rigid. They should always embrace flexibility and enable the project manager to best meet the needs of the project on account of adhering to the methodology, not being burdened by it or having to deviate from it. And in Level 3 methodologies, the PMO and project managers do not engage in informal project management. You can call it what you want, but informal project management is ad hoc project management and nearly always reverts back to lower levels of maturity.

At higher levels of project management maturity, the PMO's project management methodology doesn't become loose and extemporaneous; instead it becomes optimized and value-based. Rather than informal guidelines and checklists, at higher levels of maturity the PMO continually improves its processes. The PMO seeks out ways to incorporate practical experience from such things as lessons-learned feedback. It seeks to incorporate knowledge acquired from training into the methodology. The PMO continually integrates into the methodology

tool usage and new and special purpose processes and subprocesses. The value of the methodology increases not by a laissez-faire approach, but by a commitment to continuous improvement, which is only made possible with a process-oriented methodology framework that accommodates multiple approaches.

PMO thought leaders Kendall and Rollins (2003) advice, “What has been missing in the approach to date is the umbrella under which various methodologies can operate in harmony.” In addition to housing the multiple methodologies, perhaps the greatest advantage of the umbrella methodology is that it promotes a culture of continuous improvement in project management.

As renowned Kaizen expert Masaaki Imai (1986, p. 16) writes “Kaizen (continuous improvement) generates process-oriented thinking, since processes must be improved before we get improved results.” More and more PMOs and PMO thought leaders are advocating streamlined approaches for project management. The methodology-oriented mindset promotes bureaucracy and this mindset is on the decline. The process-oriented mindset has proven to be effective from the teachings of Deming, to the manufacturing excellence of Japanese, and to the many PMOs that are promoting a culture of continuous improvement in project management.

Technology

When it comes to establishing and maintaining the processes of the PMO, using too little or too much technology can present a problem. For some PMOs there is little to no technology involved when setting up, using, and managing their PMO processes for project management. They create or hire a project management consultant to develop a project management handbook. Frequently this handbook is in the form of a methodology document and set of project management templates; sometimes, it is simply in the form of a PowerPoint presentation. After review and acceptance by the PMO manager, a training session is scheduled and conducted for the project managers in which they receive an overview of the newly created project management methodology and their own hardcopy of the methodology neatly organized and tabbed in a three-ring binder. Some project managers refer to the handbook frequently; others might place it high on the shelf where it can be, but seldom is, reached.

At the other end of the pendulum, some PMOs are overly eager to use far too much technology. Such technology enthusiasts seek to create a functional application for the PMO’s project management processes as if project management, like order entry, was a transactional application. When they see a project management template, such as a project charter document, they don’t see the purpose and content of the template. Rather, they see an opportunity to design a form that populates data into a database. Whether or not the data in the database can be used for anything meaningful other than producing a report is not a consideration.

Likewise, such overly enthusiastic technologists envision ways to develop application workflow to render just the project management methodology components that they think different users should see or, perhaps, to configure the unique path of the project based upon project type and size parameters. They might develop a rigid document workflow with routing and triggers for approvals and exceptions. After all, the technology exists to do all of these things. Complex technology can be thrown at any problem, but why do this and who is asking for it?

Certainly, if there is a business case and compelling reason to apply complex technology to the project management processes of the PMO, then such an effort might be justified. But without a clear vision and compelling business case such an effort can quickly become a technical exercise that gives the appearance of solving a problem when in fact the problem that it solved didn’t really exist and the problem that did exist wasn’t really solved.

For most PMO project management processes there is a natural point of equilibrium relative to the technology infrastructure of the organization. This equilibrium point is neither too primitive, from a technological point of view, nor too complex. The level of technology applied has a direct impact on the degree of use and effectiveness of the project management processes of the PMO (see Figure 13).

No matter how good a project management process is in theory, paper based processes don’t work. Book knowledge and hardcopy project management methodology manuals and handbooks might give the illusion of having a project management process but, in reality, such notebooks and binders rarely leave their shelves. Some project managers no doubt take the time and effort to read and adhere to such playbooks, but many other project managers do not. They are too busy managing too many projects and sometimes even performing some of the tasks of the projects themselves. Outside of the immediate team of project managers, few, if any, of the project team participants, functional resources, or management take the time, or have the time, to read understand, and benefit from the methodology manual. They probably don’t even have a hardcopy.

	Technology supporting PMO processes				Enabled Process Framework
	Hardcopy	Softcopy	Shared	Posted	
High				Internet / Collaboration	
Medium			Local area network		
		Electronic			
Low	Paperbased				
		Level of Technology			

Figure 13: Technology supporting PMO processes

Electronic forms of a project management methodology are a step up from paper-based approaches. But if the electronic project management methodology is simply a Microsoft Word document or PDF file, it is emailed throughout the immediate team of project managers where it is skimmed once or twice and stored on their PC hard drive.

The next step up on the technology ladder is to use the organization’s local area network (LAN) and store the methodology document on a shared drive. At least in this approach there is one form of the methodology available via shared access for the team to find and use. Of course, only those in the organization with access to the LAN file share can find the methodology document so in many cases those in the business units who have projects of their own or who are team members of the projects of the PMO do not have the accessibility to use the project management methodology.

Intranet sites and collaboration platforms are a significant next step up in the application of technology to the PMO’s project management processes.

Intranet sites offer wide access to all of the users who make up an organization. No longer constrained by physical network and server infrastructure, company intranets enabled wide sharing of information. Many PMOs benefit from having their own intranet site, often a sub site of the IT department intranet. The PMO intranet site can provide useful information to all those involved with projects and the PMO such as processes and templates, announcements and events, and project management training and reference materials. Intranet sites can range from HTML-based approaches to the use of vendor collaboration platforms such as IBM Lotus, Microsoft SharePoint, and the many other vendor offerings.

The next step up on the technology ladder for the PMO’s project management processes is the establishment of a project management process framework. For most PMOs, the value of the process framework is tremendous for two reasons. First, it enables the PMO to properly house the content assets of the PMO. Content assets are all of the nonapplication items that PMOs have such as processes and templates, policies and guidance, executive summary dashboards, tips and techniques, and project management training and reference information. Second, and most important, the process framework enables the PMO to render the content assets of the PMO to the user in the context of the PMO project management processes being accessed and followed. In terms of adherence and effective usage, this is a significant and natural next step up in the use of intranet-based technology.

Rather than posting a methodology document on the intranet where users still have to read through a lengthy and often overly detailed document, the PMO provides users with a process framework that enables them to easily navigate through the appropriate processes and find the information that they require.

For PMOs of all shapes and sizes the process framework is far more than a methodology. It is a right-sized playbook for not only the project management processes and policies but for the executive processes as well such as governance, new project selection, and management of the portfolio. As a framework, tremendous amounts of content can be accessed with relative ease—far more than could ever be placed in a methodology document. A project management methodology document, if kept to a small and manageable file size, likely would not provide the level of detail and information required by the users. Conversely, if the methodology document does attempt to capture the full amount of detail required to stand up to a comprehensive project management process for the PMO, then it is likely to become so large, in terms of page count, that few users would have the time or desire to read through it.

From a technology perspective, if the PMO settles for applying too low of a technology to its project management process, then it is likely that the PMO ends up with a methodology-oriented mindset in the form of static methodology manuals and sets of templates. Though well intended, this does not bring about the desired level of effective usage and adherence to the PMO processes and policies.

On the other hand, if the PMO applies just a bit more technology to enable its methodology content in the form of a process framework, then a much greater level of buy-in and effective use of the PMO processes and policies occur. They are much easier to access, use, maintain, and improve on. The PMO project management process framework not only serves as an on demand guide to execution of the project management process, but a useful resource for both project management training and continuous improvement. Using the technology of a process framework, the PMO is able to integrate all things useful and usable into its processes and policies driving higher levels of project management skill and organizational project management capabilities.

Economics

Surprisingly, economics has a subtle, negative effect on the processes and policies of many PMOs. The reason for this is simple. Many PMOs don't have the time or resources to develop their PMO project management process frameworks. Developing a process framework from scratch takes far more work and thought than most people realize unless they have done it before. First, you have all of the research, information gathering, and discussions and debates required to put forth a skeleton model of the PMO processes and policies. Though it is helpful to have standards to draw upon, a great deal of authoring needs to take place.

In addition to gathering all of the requisite process information and supporting documents, such as project management process and templates, substantial work needs to take place to determine and develop common formats for the information. Few PMOs are happy with a set of processes and templates each of different formats, styles, character sizes, and font types that have been cobbled together. Some organizations have internal standards for documents and intranet web pages along with authoring and publishing guidance, which can save a great deal of time in design and development, but many organizations do not. So for the PMO whose project managers are too busy managing projects to do this work and whose PMO manager is far too busy working with the executives and supporting the project managers in their projects to do this work, what options are left?

One option is to bring in a consultant, a PMO expert, to develop the project management processes and policies for the PMO. The problem with this approach is that most consultants who provide methodology consulting to their clients do this on a consulting engagement basis:

- Step one establishes the goals and objectives for the engagement.
- Step two involves the performance of a gap analysis through extensive interviews with management and staff.
- Step three includes the consultant's preparation and presentation of the gap analysis findings. Sometimes the gap analysis is related to the desired present and future state of how the PMO wants to operate. Other times the gap analysis is more of a report that ranks the assessed level of project management skills and capabilities of the project managers to a prescribed project management model such as the PMI Guide to the PMBOK®. In either case, nearly always the consultant is presenting information of which the PMO manager is already all too aware.
- Step four, the consultant develops the project management methodology for the client. This can take several days though much of the end product is similar from one client to the next. Step five, the consultant delivers and reviews the project management methodology with the PMO and changes are made if necessary.
- Step six, the consultant performs a number of workshops and training sessions to present the methodology to management and to train, in greater depth, the project managers in the methodology.

Many PMOs find this option to be too costly and time consuming. After all, they are not looking to purchase a lengthy consulting engagement, rather they are searching for a customizable project management process framework. Some PMOs might go forward with this option, but many others look for another option or accept the fact that they might have to do it themselves.

Another option is to work with the vendor that provided the project management training to the PMO. Every project management training firm has some kind of methodology offering. However, most of the methodology offerings provided by project management training firms have the look, touch, and feel of their training materials. They are structured more like an electronic version of a body of knowledge than a project management process for a PMO. Of course, their core business is performing project management training and in achieving economies of scale in the training business model so there is not a great deal of focus on, or time for, developing and implementing customizable project management methodology offerings. The economics of product development preclude most training firms from engaging in it.

Another option that the PMO might consider is the numerous internet based products and services for project management methodology. Many of these subscription offerings and downloadable products are well-

suited for individual use and they are inexpensive. In fact, without too much effort, one can search the internet and find a website or blog offering project management methodology documents and templates for free. Of course these things are of little value to a PMO. Most PMOs already have methodologies and templates. The IT infrastructure team already has their project delivery approach for IT infrastructure projects, the enterprise applications team already has their systems development methodology for major implementations of enterprise software, and the applications development organization already has their Agile software development methods for developing and maintaining software applications. What the PMO needs is not yet another approach for managing a project, but as Kendall and Rollins (2003) advise, an umbrella under which the various methodologies can operate in harmony.

For larger PMOs that have project portfolio management software applications such as those represented in the Gartner Group Project Portfolio Management (PPM) Magic Quadrant Report, another option for consideration to meet the project management process needs of the PMO is the PMO and project management best practices that are available from the PPM vendors. Some of these best practices are provided at no charge as part of the PPM application; others are modules that can be provided on a per-user licensable basis.

Many of these PPM vendor best practice frameworks are designed to work both with the vendor's PPM application as well as to be customizable to meet customer specific PMO processes and policies. These best practice frameworks cannot only save the PMO a considerable amount of time in establishing project management processes, but they are also tailored and integrated to the vendor's PPM application. Hence, they not only serve as the PMO's project management process, but also a roadmap for effective PPM tool usage.

In addition to the application and the project management processes, many of the leading PPM vendors have teams of PMO subject matter experts and project management process methodology consultants who are available to assist with PMO setup, methodology development, and, of course, PPM application usage. Of course if the PMO is not ready, or does not want, to implement a leading project portfolio management application, then the economics of cost and benefits likely preclude the PMO for acquiring the PPM vendor's application just for the sake of getting their project management process best practice framework. However, PMOs that are using these leading project portfolio management applications are well served by fully utilizing the project management process modules, workflows, and frameworks along with the methodology development and customization services provided by these vendors.

In response to the need that PMOs of all shapes and sizes have for a flexible and customizable project management process framework that can be quickly implemented and easily maintained, a number of *content-only* methodology offerings have emerged on the market. Some of these offerings are delivered as traditional out-of-the-box products, others are provided as subscription offerings, and yet others are provided as customizable solutions that come with, or require, implementation services to install and modify. Collectively these offerings offer an ability for the PMO to purchase and quickly set up and tailor their PMO processes and policies instead of the time consuming, and sometimes bothersome, task of doing it themselves from scratch.

There is no shortage of vendor solutions that address the process and policy needs of the PMO. As shown in Figure 14, some of these solutions are single user offerings such as PC products and internet subscriptions that are typically used in a stand-alone manner by those managing projects; others are designed and intended to be multi-user solutions providing a complete framework for the PMO consisting of processes and policies, dashboards and metrics, and integration to the functional tools and applications of the PMO such as project portfolio management systems (Project Server, Planview, Clarity, ITG) and collaboration platforms (SharePoint, Lotus, eRoom).

Typically the PC-based products such as Method123, IT Toolkit, ProGo, offer sets of preformatted project management templates saving the PMO the time that otherwise would be required to author project management documents. Such templates come in the form of a kit that is customarily licensed on a per user basis, which can often be problematic from a PMO expense perspective. Technically the project management templates are simply files, usually in Microsoft Word format. Most PMOs have a project manager or two who have purchased a project management template toolkit product of some kind. While there is some degree of value to template toolkits, most PMOs quickly realize that they require not just templates but a usable framework to render the templates as well as other information and guidance, and in the context of a set of scalable processes, best practices, and policies.

Vendor offerings for PMO processes			
PMO-wide			Processes ondemand
			PMCOP
			Processmax
Multi-user		Gantthead	
		Tenstep	
Individual	Method123	Project connections	
	IT toolkit; ProGo		
	PC-based products	Web-based subscriptions	Customizable PMO process frameworks
		Offering type	

Figure 14: Vendor offerings for PMO processes

Web-based subscription offerings for PMO processes and policies such as Gantthead, Tenstep, and Project Connections offer not only project management templates but much more detailed information in the form of process workflows, guidance, and examples. As a subscription offering from the provider’s website, PMO processes for project management are available as is on a licensed, per user basis. Though there is not an ability to customize the content, there is significant referential value to the PMO in having access to a wide range of processes, policies, and information that is maintained and updated by the provider. Such subscription information is helpful to most PMOs. A few of the PMO staff could draw upon a wide variety of project management and software development life cycle processes to review and use as input in the development of their own PMO processes. These selected processes can be used by those in the PMO with a per user subscription, or more likely, they can be tailored, implemented internally, and made available to users throughout the organization.

The effort to repurpose off-the-shelf PC-based methodology products and web-based subscription content into a useful and manageable PMO process framework requires a considerable amount of work. More and more PMOs are looking to vendor solutions for ready-to-set-up-and-use PMO process frameworks. Such solutions as Processes on demand, PMCOP, ProcessMax, RUP, among others, provide not just the content for managing projects and managing the PMO, but also the much needed process framework. To the user the process framework is like an online playbook that not only provides all of the plays, but also the score of the game. To the PMO manager, or owner of the processes, the framework provides the ability to effectively manage the best practice content of the PMO and, more importantly, to truly achieve buy-in to the PMO, adherence to the PMO processes and policies, and institutionalization of project management knowledge and skills.

Collectively the emergence of these vendor products, subscriptions, and customizable PMO process frameworks has lessened the economic burden that, for many PMOs, has negatively impacted the development processes and policies. For PMOs that are resource- and budget-constrained, these vendor offerings can provide considerable assistance in the setup of PMO processes policies, and supporting PMO content assets. Additionally, as productized solutions, in addition to cost and time savings, significantly higher levels of product quality are prevalent as compared to in-house developed approaches because of ongoing product development and numerous customer installations.

II. SUMMARY

For many people in project management, the word methodology evokes many different visions. To some, methodology is a good thing; a way to describe that which is to be done. For others, methodology means bureaucracy and, irrespective of intent, methodologies are perceived to be too rigid, too lengthy, too detailed, and of too little actionable value. Some PMOs have intentionally moved away from using the term methodology in order to overcome resistances to standardized methods. Other PMOs have moved toward a more streamlined way of thinking about how the processes and policies of the PMO should work, how they should be provided, used, managed, and improved.

For most PMOs the key to having a useful and usable approach for managing projects as well as managing the PMO is to establish a useful and usable process framework that can be accessed by all those involved in the projects of the PMO. This requires the right kind of mindset. Rather than a methodology oriented mindset in which the focus is limited to the what of the what is to be done, a process-oriented mindset keeps the focus on the results to be achieved. Process-oriented thinking has no limits and it seeks to answer, in context, not just the what but the who, when, where, and why of that which must be done.

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