

# Revitalize Your Zombie PMO

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"Zombie" PMOs merely go through the motions, like the walking dead, performing compliance and clerical tasks, and not knowing how to improve their contribution. Program and portfolio management leaders should help them see how to provide the real value of PPM.

## Key Challenges

- Repeated mumbling about standards and consistency is characteristic of the "exanimate" PMO, which makes it difficult to perceive differences or adapt to different project methods.
- Possessed by a narrow focus on project schedule progress, PMOs fail to provide a more comprehensive portfolio view of resource allocations, expected value and strategic alignment.
- A PMO that is staffed thinly or only with clerical staff will be unable to take on some key responsibilities. Many PMOs lack sufficient expertise and staff to consistently define project activities, analyze change impact and perform other project management work. When faced with such work, they don't even know where to begin and their eyes glaze over.

## Recommendations

When embarking on PMO transformation, PPM leaders should:

- Assess the PMO's value contribution (if any), using the PMO Vital Signs Review tool in this research. If the PMO is one of the "walking dead," then identify causes of death and rate resuscitation measures for ease and value.
- Adapt processes and adopt best-fit PPM practices by resisting the standardization of one-size-fits-all approaches, and instead fit processes to different kinds of projects, ensuring that PMOs do not try to force a "sledgehammer" process on a "penny nail" project.
- Boost value and financial management maturity by driving business case alignment and accountability. Use postproject reviews of business case benefits realization to quantify observed and perceived value.
- Promote the PMO as the source of the enterprise's highest level of PPM expertise. Make it the PMO's role to identify, staff and support the most advanced project managers (PMs) and retain them via a rewarding career path.

## Table of Contents

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Introduction.....	2
Use the PMO Vital Signs Review to Assess the PMO's Contribution.....	2
Analysis.....	4
Find and Adopt Best-Fit PPM Practices and Processes.....	5
Drive Business Case Alignment and Accountability to Boost Value Contribution.....	7
Make It the PMO's Role to Identify, Staff and Support the Best Project Managers.....	8
Gartner Recommended Reading.....	10

## List of Tables

---

Table 1. PMO Vital Signs Review.....	3
--------------------------------------	---

## List of Figures

---

Figure 1. Sample Process Toolkit: Use the Right Tool for the Job.....	6
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## Introduction

Executives clearly support some measure of program and portfolio management (PPM) in principle — but too often we speak with executives whose PMOs continue to underperform. Their program or portfolio management offices (PMOs) may have *begun* to form a hub or clearinghouse for PPM activities, but they lack key capabilities.

They linger too long at an "emerging discipline" level — some knowingly, but some complacently ignorant of expectations that the PMO will boost performance, inform decision making and accelerate the organization's ability to adopt new methods, change and build new things. These are goals that will not be met by complacent Zombie PMOs.<sup>1</sup>

### Use the PMO Vital Signs Review to Assess the PMO's Contribution

A good way to test whether your PMO has slipped into a Zombie state is by assessing it vis-à-vis 10 straightforward statements that characterize healthy, high-capability PMOs (see Table 1). The statements are divided into four areas: skills, process, value and senior management engagement. By rating your PMO 1 through 4 for each of the statements, you can assess each area's vitality and, if that vitality seems drained, the chances of revitalization.

Table 1. PMO Vital Signs Review

Area	PMO Attribute	Rating 1 = Generally Not/Rarely, 2 = Sometimes/ Partly, 3 = Often/Mostly, 4 = Generally Yes/Routinely
<b>Skills:</b> PM Level	The PMO is perceived as the source of most of the best project managers (10% to 20% of all PMs).	
<b>Skills:</b> PMO Capacity	The PMO is sufficiently staffed not only to monitor the project portfolio, but also to provide a core of capable PMs for selected projects and for some specialty roles (e.g., part-time mentoring/training, estimating support, postproject review).	
<b>Skills:</b> Training and Mentoring	The PMO provides support for project management training. This may take various forms, including a center of excellence, formal internal or external training, or coaching/mentoring.	
<b>Process:</b> Best-Fit Repertoire	The PMO supports a flexible process repertoire (e.g., with alternate templates and workflows), fitting methodology appropriately to different kinds of projects (e.g., phased, experimental).	
<b>Process:</b> Focus	The PMO is primarily focused on planning and on leadership support, not on procedural compliance and checklists (though it may provide secondary monitoring and procedural services in support of planning and leadership).	
<b>Process:</b> Relationship	The PMO maintains clear responsibility and accountability for its portfolio, while consulting with other teams dealing with nonproject work (e.g., IT service management, application maintenance/enhancement), sharing information and consulting as appropriate.	
<b>Value:</b> Postproject Review	To support continuous process and performance improvement, and provide accountability, the PMO performs postproject reviews that include not only project metrics (e.g., schedule/budget variances from initial and rebaselined estimates), but also reviews of benefit claims from approved business cases.	
<b>Value:</b> Resource Allocation Support	By tracking resource allocations to both project and nonproject work, and tracking progress on the portfolio of projects, the PMO can help identify availability of resources for future projects in support of capacity planning and prioritization decisions.	
<b>Value:</b> Prioritization	The PMO does not merely offer snapshots of the project portfolio at a point in time. It also keeps track of the level of investment in different portfolio categories aligned with enterprise and IT strategy. This lets senior management determine areas of underinvestment or overinvestment.	

Area	PMO Attribute	Rating 1 = Generally Not/Rarely, 2 = Sometimes/ Partly, 3 = Often/Mostly, 4 = Generally Yes/Routinely
<b>Senior Management Engagement</b>	Senior management relies on the PMO to drive project success and to provide views of resource capacity and IT investment alignment. This reliance is reflected in the PMO's preparation of and involvement in periodic steering/governance sessions to review, recalibrate and prioritize the project portfolio.	

Source: Gartner (April 2018)

Add up your individual ratings to get a total score. Total possible scores will range from 10 to 40. Use the total score ranges below to evaluate the overall condition of your PMO and find out what needs to be done to revitalize, if necessary.

- **Score of 30 to 40** — Your PMO is alive and well! It's making a strong value contribution.
- **Score of 25 to 30** — Your PMO may be seriously ill, but it is not a Zombie and should respond well to treatment; certainly improve any items rated 1, for starters.
- **Score of 20 to 25** — The situation is also severe. If your 1 ratings are all focused in one area (skills, process, value or senior management engagement), then focus on improving at least one item in that area. If you rated an area all 2s, try to boost at least one item to a more consistent rating of 3.
- **Score of 15 to 20** — The situation is dire. Often the best immediate chance at new life is to become more consistent in those areas you rated a 2, performing those activities, not just sometimes, but often. Follow with other improvements as soon as possible.
- **Score of 10 to 15** — Your PMO is a Zombie that is likely beyond help and would be better off dead, though terminating it may not be easy.

## Analysis

The most debilitating trait of a Zombie PMO is its glazed eyes, its lack of focus on its contribution to the organization — that is, to its own colleagues. Without this focus, such a PMO does not attempt self-improvement. Worse, when calls for change come, from either IT management or other corners of the business, the Zombie PMO turns a deaf ear. Such a PMO is most subject to restructuring or elimination.

But, effective PPM leaders can help revitalize such lackluster PMOs.

## Find and Adopt Best-Fit PPM Practices and Processes

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### Symptoms

In practices and processes, a Zombie PMO exhibits these characteristics:

- Often operates as a process "cop," concerned primarily that reports are filled out correctly, on-time and in complete compliance with sometimes irrelevant procedures.
- Lacks skilled, experienced PMs, so it instead deploys the detailed checklist (which tends to grow over time) of a monolithic methodology.
- Actively discourages individual PMs who resist the one-size-fits-all process. When process fits project, it is largely accidental.
- Allows projects to proceed with either overelaborate schedules or, contrariwise, no process for developing schedule information.
- Cannot distinguish among the various kinds of projects and programs, and so cannot apply the best-fit processes to projects — if an effective, flexible set of alternative processes is even available.
- Has seldom worked with other IT process experts to define an effective, flexible set of alternative processes.

### Analysis

To help the Zombie PMO recover from its unfortunate condition, PPM leaders should evaluate their project processes to ensure they are not monolithic or strictly sequential. Best practices vary for different projects and programs — which differ in kind, not just degree. Getting to Level 2 out of the Level 1 chaos may once, in a previous existence, have involved the establishment of a single, rigid process. But that was just a starting point. Once process adherence is established, a flexible approach (perhaps featuring a few predefined, out-of-the-box process alternatives) can more efficiently deliver disparate project types (see Figure 1).<sup>2</sup>

Figure 1. Sample Process Toolkit: Use the Right Tool for the Job

Sample Process Toolkit: Use the Right Tool for the Job	
	
<b>Agile PM (e.g., Scrum, Lean)</b>	New development projects, open-ended requirements under general scope, short increments for feedback, innovation
<b>Agile Support (e.g., Kanban)</b>	Continuous enhancement and release, often with DevOps for automated testing and source code management
<b>External Contractor</b>	Earned value management (EVM or "EVM Lite") or other techniques for program assurance
<b>Infrastructure/Operations</b>	Managed work in IT only vs. multiple business units
<b>Iterative (e.g., Spiral)</b>	Inception yields partial requirements, execution proceeds with ongoing elaboration of user/customer needs
<b>Package Implementation</b>	Fit needs to market, customize
<b>Phase-Structured ("Waterfall")</b>	Requirements largely defined prior to subsequent phases
<b>Hybrid or Iterfall ("Wagile")</b>	Hybrid approach with short-term (e.g., quarterly) projects/releases of fully viable deliverables meeting partial requirements in incremental "cascade"

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Source: Gartner (April 2018)

At higher levels of capability, the PMO supports a more collaborative approach to settling on suitable practices and processes for projects and programs. Lean-style management practices provide a customer value focus, strengthened by establishment of benefit review processes.<sup>3</sup>

More capable PMOs also implement a feedback mechanism to stimulate learning, which can be applied to refining and streamlining processes so they can better reflect organizational reality and changing needs (see also "How PPM Leaders Can Get Onboard With Bimodal" and "Activist PMOs and the Struggle for Lean PPM").

*PMO leaders should apply best-fit processes to different kinds of projects, ensuring that they are not attempting to apply complicated processes to simple projects.*

## Action Plan

- Ensure that project management processes are not monolithic or strictly sequential.
- Include an appropriate process selection component in securing stakeholders' agreement to project charters.
- Exercise flexibility, enabling approaches that may be adapted from predefined process alternatives (e.g., those shown in Figure 1).

## Drive Business Case Alignment and Accountability to Boost Value Contribution

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### Symptoms

Zombie PMOs have little awareness of value contribution and financial management. Generally, they are inadequate and in dire need of improvement at performing these functions:

- **Following up on business cases for accountability** — They don't follow up despite the availability of well-established, easily implemented measurement tools such as the Likert scale, which are suited to the purpose.
- **Aligning projects with portfolio categories to see which goals may be getting shortchanged** — They blame management for not providing a clear strategic framework, while they make no effort to offer frameworks for review and revision.
- **Correcting bad estimates** — Rather than drive for better project budgeting, they acquiesce to a fallacious estimating process. Often the process is based on premature estimates floated when initially proposing a project by staff without sufficient detail about the project (or the necessary data and experience to calculate the approximate costs).

### Analysis

A Zombie PMO may be fairly effective at maintaining the project queue. However, it does not analyze projects' alignment with a set of enterprise goals. This may not be entirely the PMO's fault. Usually, these goals have not been articulated by management which, at maturity Level 2, pays scant attention to alignment with goals.

In these situations, a PPM leader can help bring the Zombie PMO new life by driving it to a new value proposition: tracking levels of investment against management's intended levels for their goals. However, it can do so only if those intentions are made clear.

Although each goal's priority and weight may not be clear, leaders should persevere in seeking guidance.<sup>4</sup> One Gartner client in the PMO of a European energy company recently offered a proposed framework to its management, basing the framework on sources at hand, including annual reports, internal memoranda and recent years' apparent priorities (based on spending levels). With some iterative refinement, the framework was adopted, thanks to this PMO's perseverance.

The PMO needs executive guidance. This is key to enhancing its role in value management. It cannot provide useful recommendations about managing the project queue, and persevere in doing so, without such guidance.

Another warning sign in the value and financial management dimension has to do with poor assessment of costs and benefits, and an inability to learn and improve on those assessments. Why? Because a PMO that is just going through the motions — like the "walking dead" — is ineffective at any project *follow-up*. The PMO may indeed conduct postproject reviews ... but of what? If the budget is bogus and the schedule is really just a hoped-for target date, then what can be measured and what can be learned? A lesson in the futility of tracking only against plan will do little to advance PPM capability.

Another common failing among PMOs is an inability to resist project budgets based on premature guesstimates. All too often, when a project sponsor proposes a new project, he or she is immediately asked to provide a budget estimate. And, all too often, the sponsor — anxious to see the idea go further — will offer up a number, even though he has no training or experience in estimating project costs. Very quickly, that number will be adopted as final (or "set in stone" as some clients describe it) — even though it has little factual basis. And later, as the scope and deliverables are further defined, the delusional budget number and the scope and deliverables of the project become totally divorced from reality. Time reporting may be in place to capture approximate project costs; however, these cannot be contrasted with meaningful initial and updated baselines because there are none.

Similarly, for newly proposed projects, Zombie PMOs may uncritically collect business cases, and they are feeble at driving accountability for project performance. One way of doing so is to return to the business case after the project and conduct scale-based surveys (e.g., a 1 to 6 scale) about the value propositions stated in the business case. The score average lets managers trend the summary data of business cases over time. This approach also avoids wasting time vainly trying to quantify ROI without sufficient information about the project or its context (i.e., the ROI Rathole).

## Action Plan

- Give the PMO needed executive guidance to track levels of investment against intention.
- Follow up on cost-benefit analysis (CBA) estimates to build feedback loops that provide accountability and improve business case development.
- Resist delusional project budgets based on premature guesstimates.

## Make It the PMO's Role to Identify, Staff and Support the Best Project Managers

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## Symptoms

Successful project managers keep taking other jobs, either internally or externally, because no career path matches their training or experience. This is typical of an enterprise stuck at PPM Level 2 with a PMO featuring these characteristics:

- Consists of little more than one or two people with some kind of PMO title. If the PMO has more staff, most are administrative aides who have had "and project manager" appended to their real job title.
- Lacks any commitments for workloads of senior or advanced PMs. They are regularly requested for projects, and generally overallocated to projects.
- Seldom has a career path for retaining and developing staff to become experienced, expert PMs, and is not staffed with any advanced PMs.

## Analysis

By associating PPM experts with the PMO — or concentrating them in it — leaders may effect a Zombie cure. With a shift in focus from the PMO's procedural support and paperwork function to its role as the focal point of project management and program management excellence, the PMO can overcome its malaise. *PMO leaders should identify the organization's 10% to 20% most capable and experienced program and portfolio managers.*

Shifting the PMO's focus not only lets it nurture and provide master-level program and project managers — it also lets PMs learn from and reinforce one another. It also promotes the mentoring of more junior PMs. One large California retailer has dispensed with classroom- or seminar-based training in favor of a buddy system. It pairs advanced PMs with the "occasional" PMs from other departments to both provide training and ensure quality project planning, leadership and control.

To progress, more capable PMOs often diversify — developing PMs with specializations, which will range beyond oversight and managing projects. In various highly capable PMOs we have spoken with,<sup>2</sup> these roles have included such specialties as:

- Facilitating project chartering and reviewing business cases
- Taking on agile product owner or ScrumMaster roles
- Gathering project and program metrics
- Conducting benefit reviews
- Monitoring external service providers performing contract projects
- Evaluating the quality of project and program plans and budgets
- Training and coaching

## Action Plan

- Shift the PMO's focus from procedural support and paperwork to becoming the focal point of project and program management excellence.
- Pair advanced PM mentors with junior or "occasional" PMs for training and to ensure quality project planning, leadership and control.

- Develop and cultivate project management specialties like business case/charter review, agile product owner or ScrumMaster roles, and postproject metrics and benefits reviews.

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"Activist PMOs and the Struggle for Lean PPM"

"How Activist PMOs Streamline Processes, Protect Users, Raise Stakeholder Value and Improve Governance"

"Activist Investor PMOs Drive Reform, Track Value and Provide Accountability"

"PMOs Can Deliver Faster Results With Business Agile"

"ITScore for Program and Portfolio Management"

"How IT PMOs Can Remain Relevant in the Age of Digitalization"

"Planning an Agile Project"

"How PPM Leaders Can Get Onboard With Bimodal"

"Adapt Project Change Management to a Bimodal Context"

"Link Strategy With Tactics Using Strategy Maps and PPM Dashboards"

## Evidence

<sup>1</sup> Over the last two years, Gartner has assessed several thousand organizations through our ITScore maturity assessment and delivered several hundred interactions around PPM maturity. These interactions support this conclusion.

<sup>2</sup> See "Embrace Bimodal Business Transformation by Adopting Lean Startup Techniques."

<sup>3</sup> S.C. Bell and M. Orzen. "Lean IT: Enabling and Sustaining Your Lean Transformation." Taylor & Francis Group. 2011.

<sup>4</sup> "Perseverance, dear my lord, Keeps honor bright." *Troilus and Cressida*, Act 3, Scene 3. William Shakespeare.

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