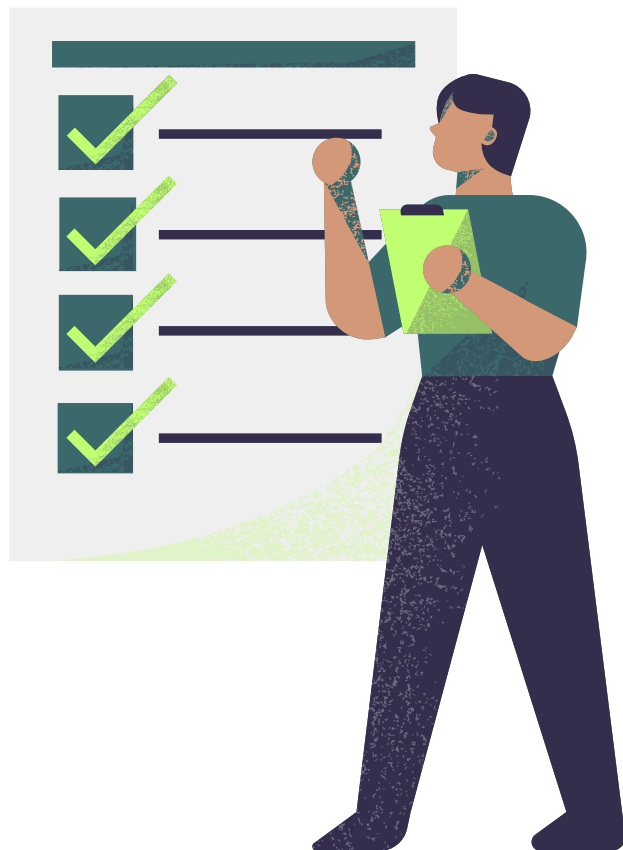# The 10-Minute PMO Health Check:

Are You Board-Ready?

Which of the following apply to you?

Can you get more than 4?

Step 1: Governance and Decisions

What it means: Figure out who makes the choices, when they make them, and how they decide. This helps projects move forward without confusion or delays.

Top PMOs thrive when:

Decision rights are explicit. Tie-breaker roles for scope/schedule/cost are written and socialized.

Stage gates are right-sized. Governance accelerates value, not paperwork.

Policies are lived. Risk, change, and quality policies are practiced, not just posted.

Pro tip: Share a simple one-page chart that shows who does what (RACI) and when to act. Add a quick rule: if a decision is stuck for more than 1–2 days, it moves up to the next leader. This keeps work moving.

Step 2: Portfolio and Prioritization

What it means: Align work to strategy with a single, ranked list built on clear intake, resource capacity, and success (and kill) criteria.

Priority projects succeed because:

✓ A single-ranked backlog exists. 90-day portfolio priorities with business value and capacity trade-offs are visible.

✓ Intake is disciplined. Work enters via one path with clear criteria and a benefits hypothesis.

✓ Stop rules exist. Kill/park thresholds (value erosion, risk spikes) are defined and enforced.

👉 **Pro tip:** Score work by value vs. effort (or use WSJF-lite — a quick way to rank tasks by value and effort). Limit how many tasks each team works on at once so they can finish faster.

Step 3: Project and Program Delivery Controls

Overview: Set the minimum practices that protect dates and quality (shared definition of "Done", pragmatic change control, managed critical path).

Healthy controls and agility happens when:

✓ Definition of "Done" is shared across PMO, teams, and vendors.

✓ Critical path is managed daily and blockers are cleared within one business day.

✓ Change control is pragmatic (fast path for low-risk changes; formal path for material impacts).

👉 **Pro tip:** Hold a quick 15-minute check to review the critical path (the must-do steps to finish on time) and any blockers (things stopping progress). Do this outside your daily stand-up and track how long blockers stick around each day.

Step 4: Risk, Security, and Compliance

Overview: Make the biggest threats visible early; build plans that embed owners, triggers, and mitigations.

Your threat profile is reduced where:

✓ Top 5 risks have owners, triggers, and dated mitigations.

✓ Regulatory/security impacts (PII/PHI/SOX/PCI/etc.) are integrated into plans, not bolted on.

✓ Rollback is rehearsed for major releases (not just documented).

👉 **Pro tip:** Show the top 5 risks on your exec dashboard. Add trend arrows (are risks getting better or worse?) and list the next action with the person responsible.

Step 5: Stakeholders and Change Enablement

Overview: Engage sponsors and end-users with plain-language comms, training, and adoption metrics, not just go-live dates.

Understanding and adoption of change happens when:

✓ Executive cadence is real. Sponsor shows up and makes trade-offs.

✓ Comms answer "What changes for me?" with timelines, training, and support.

✓ Adoption is measured (usage/behavior change), not assumed.

👉 **Pro tip:** For every release, ask: 'Who needs to do something new or different?' Then, check within two weeks if people are actually using it and changing their behavior.

Step 6: Data, Tooling, and Visibility

Overview: Provide one source of truth with automated reporting and right-sized access so leaders see the same story.

Clear and helpful info is at your fingertips when:

✓ One source of truth for status, KPIs, decisions, and docs (no swivel-chair reporting).

✓ Integration is favored over exports. Toolchain passes data; reporting is automated.

✓ Access is right-sized (the right people can see/update without tickets).

👉 **Pro tip:** Pick 5–7 key measures (like milestone changes, blocker age, risk trends, and spend vs. plan) and make one dashboard the single source of truth.

Step 7: Vendors and Commercials

Overview: Align SOWs, incentives, and exit plans to outcomes — so vendor partners win when your business wins.

Contractual relationships thrive where:

✓ SOWs specify outcomes with SLAs, deliverables, and acceptance criteria.

✓ Incentives align to value, not just hours burned.

✓ Exit/transition plans include knowledge transfer and IP clarity.

☞ **Pro tip:** Link 10–20% of vendor fees to clear success measures (like meeting agreed goals) and include a 2-week knowledge transfer plan in every Statement of Work (SOW).

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Step 8: Financials and Benefits

Overview: Keep spending within guardrails and ensure someone owns value realization after go-live.

Project outcomes become realized value when:

✓ Guardrails exist (budget, contingency, thresholds for re-approval).

✓ Forecast vs. actual is reviewed with Finance at least weekly.

✓ Benefits realization has an owner post go-live.

👉 **Pro tip:** Keep a simple benefits log that tracks early signs (leading metrics) and results (lagging metrics). Compare your forecast to actual numbers every week with Finance.

Step 9: PMO Capability and Talent

Overview: Make sure everyone knows their role. Keep extra capacity and share knowledge so work doesn't stop when someone is out.

High-performing PMOs ensure that:

✓ Role clarity means everyone knows their job: PM (Project Manager), PO (Product Owner), SM (Scrum Master), BA (Business Analyst), and Tech Lead. Document it and make sure it's practiced.

✓ Project Management Consulting capacity is available for senior leadership and recovery efforts.

✓ Knowledge transfer is built-in (e.g., Corbeau's 4K: Kickoff, Kanban, KPIs, Knowledge Transfer).

👉 **Pro tip:** Line up extra consultants ahead of time for busy periods. At project close, do a 4K handoff: Kickoff summary, Kanban board, KPIs (key measures), and Knowledge Transfer.

Quick wins in 10 days:
1. Stand up a single exec dashboard for outcomes, risks, decisions, and spend.
2. Publish a 30/60/90 portfolio plan with capacity and kill criteria.
3. Hold a 60-minute dependency & risk summit with all vendors in one room.

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About <u>Corbeau Tech</u>

Who We Are

At Corbeau Tech, we tackle project challenges by equipping leaders with the habits, mindsets, and connections to turn ideas into results.

We go beyond mechanics to build trust and deliver outcomes that matter.

What We Do

- PMO Strategy and Design
- Portfolio Management and Prioritization
- PMO Health Assessments
- PMO Playbooks and Frameworks
- Executive Dashboards and Reporting
- Achievable and Realistic Continuous Improvement

How We Help PMOs & Executives

- **Clarity:** Translate strategy into a ranked portfolio and actionable governance model.

- **Control:** Implement right-sized processes that accelerate, not slow delivery.

- **Confidence:** Deliver transparent reporting and risk management that earns executive trust.

Explore more at **<u>corbeautech.com</u>**

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