



Planisware

EBOOK

From Project Manager to Project Management Officer: How to Navigate the Mindset Shift

You've made the shift from project manager to project management officer. It seemed like the obvious next step—perhaps you've earned your stripes by **managing multiple projects**. Or, maybe you're a natural when communicating with stakeholders, internally and externally.

Yet the move to project management officer is rarely an easy one. While your project management skills will give you an added advantage, the role of project management officer requires a shift in your approach and thinking. After all, your role has been mainly operational up until now. And as a project management officer, you'll need to be more strategic. You'll also be the one to determine and drive forward best practices, increasing project management maturity in the long run.



In this guide, we're going to outline the skills you need to navigate the mindset shift from project manager to project management officer. But before we do, let's understand the difference between the two.

Project Manager Vs Project Management Officer

A project management officer isn't an extreme version of a project manager. While both roles have crossover skills, their goals and tactics are very different.

A project manager works in the trenches. They are responsible for:

- Managing team's time and overseeing deliverables
- Guiding project teams on operational tasks
- Ensuring teams follow best practices
- Feeding back issues and concerns to the project management officer and other stakeholders

A project management officer, on the other hand, operates from within the Project Management Office (PMO). They are responsible for:

- Overseeing a portfolio of projects
- Identifying and standardizing the best project processes and methodologies
- Prioritizing the highest-value projects for the organization
- Ensuring project compliance

This role requires strategic thinking. The ability to manage projects well so that they're on time, on budget, and sometimes even on a shoestring, is becoming increasingly important to the role.

A project management officer also acts as a point of contact between executive and operational teams to ensure strategic alignment and get the most value out of each project.



The Main Differences Between a Project Manager and a Project Management Officer

Managing Projects Vs Facilitating Multiple Projects

While a project manager oversees the operational aspects of projects, as a project management officer you must maintain a global view of the projects within your business unit or organization. You also must allocate the budget for projects in a way that will enable project teams to meet strategic goals *and* garner the best possible ROI. Along with this, you will have to determine the priorities between projects, focusing on those that will bring your organization closer to its strategic goals.

The Type of Projects

A project manager may handle a broad range of projects—**depending, of course, on their organization**. But as a project management officer, you're more likely to specialize in a specific type. This is especially the case if you work within a business unit PMO that facilitates projects for a specific department.

Take for instance the finance PMO. Its project management officer might aim to more easily meet financial compliance and regulations. In this instance, project teams and the project management officer will be working on the same project. However, when the project finishes, the project manager could oversee a project on automating sales processes, or one on digital transformation. The project management officer, however, will have moved on to another project that is focused on finance.

Following Standards Vs Creating Standards

As a project management officer, you will determine the best practices, processes, and methodologies that will help you achieve project success. These could include:

- Recommending tools to help teams become more efficient
- Standardizing processes to **capture data for project requirements**
- Outlining best practices for post-project reviews
- Assisting with **skills development**, such as guidance on training materials and support

The project manager, on the other hand, *follows* this guidance. And they ensure their team follows this guidance too. That said, they'll likely get feedback from their teams on how the standards measure up. As such, your communication with project managers will be key to creating processes that work for *all* stakeholders.

Tactical Vs Strategic

A project manager's duties are mainly operational. This means they facilitate project delivery, perhaps helping to improve processes so that teams can deliver projects on time and within budget.

On the other hand, a project management officer holds a more strategic role. You will take a bird's eye view of the organization's portfolio of projects and determine how they benefit your company's wider business objectives. From there, you can prioritize projects and ensure those most aligned with the company's goals receive resources ahead of others. Your visibility and insights into project potential will also help executives make arbitration decisions with more confidence.

4 Skills to Hone On Your Journey From Project Manager to Project Management Officer

Because the two roles are so different, your shift to project management officer may be challenging. That said, for you to have made this move in the first place means you likely have some core skills under your belt—skills we'd like to help you hone so you can shine in your new role.

1. Strategic Thinking

A project management officer needs to view projects with a strategic eye—that means understanding which projects align with their company's goals (and which don't). In some cases, this may require pushing back, which might demand a certain amount of tact. After all, it might be the HIPPO's pet project you're pushing back against.

As a project management officer, you'll have to take an impartial view and slash projects—no matter who they

belong to—when they don't align with organizational objectives.

One approach you may take is to **identify the risks within projects** and assess whether the measures you could take to mitigate them would be too costly or demand too much time and effort (when weighed against projected ROI). Another approach could be to analyze market trends, and **[cull projects that may no longer be relevant]**.

Furthermore, you'll need to hone the ability to extract lessons learned from completed projects—both good and bad. So, create processes to assess your completed projects, such as post-project reviews. You can use a **project management tool** for a granular view of deadlines and dependencies, and how your teams responded to risks. Then, you can standardize these learnings and help structure processes that will benefit all stakeholders, which will ultimately increase your company's project management maturity.

2. Data-literate and Data-driven

Project management officers must have a solid understanding of project data with the ability to make strategic decisions based on analysis. After all, there will be a range of different metrics surrounding project budgets, resource allocation, risks, and more. And you'll be the one breaking down all this data for the C-suite.

More than this, as a project management officer you will be responsible for overseeing the capturing and collection of data. Without **reliable data and slick data processes**, you might not get a good understanding of how successful projects are. This will mean you won't know which projects have a high potential for ROI and may end up allocating revenue to projects of lesser value.

As such, you will need to determine **what quality data looks like** and enforce data processing compliance within your business unit or across the organization. It will be up to you to ensure that project managers follow your standardized



processes, and collect the right data (in the right format and tool) for various factors such as project budget and resourcing. And, as the organization's project management maturity grows, you'll be the one who identifies room for improvement, stepping in to refine the data processes you've put in place.

3. Communication skills

Project management officers can't be wallflowers. In your new role, you'll need to liaise with stakeholders across your organization—from project teams to top-floor executives. And you'll need to do more than simply talk with them—you'll need to feed back concerns in a tactful way. So that everyone remains engaged with the project, even when some parties aren't getting everything they want.

And you must be able to apply these communication skills outside your organization. Take external suppliers, for instance. While it may not be within your remit to secure particular resources for an upcoming project, it will be within your remit to nurture mutually beneficial relationships. If, for instance, you recognize that the materials you're using in one project are superior to those you've used in others, you can reach out and negotiate a deal with the supplier for upcoming projects. This will likely mean that you will get a better price for each unit *and* that the supplier will consider you a priority customer.



Did you know that the skill of managing suppliers is increasingly important for IT PMOs because of the switch to SaaS models?



4. Multi-tasking

As a project management officer, you'll have a range of projects within your portfolio, all pulling for your attention. To get the best outcomes, you will want to:

- **Improve your time management skills**, such as developing a method for dealing with interruptions, and setting daily goals that you will be sure you can achieve.
- **Take a high-level view of your portfolio**, looking at it as **a web with connections and overlaying dependencies**. This will then allow you to prioritize working on those that will facilitate smoother delivery of other projects in your portfolio.
- **Delegate!** And when we say “delegate” we mean assigning tasks and not micro-managing. Not only is micro-managing a waste of your increasingly valuable time, but it will likely cause tension between you and the person you “trusted” with the job.
- **Implement the right tools and processes**. In order to see what projects are the most urgent, you'll need all project data at your fingertips.



6 Resources to Improve Your Project Management Maturity

According to a study by **Prudential**, almost 50% of workers say that the COVID-19 pandemic caused them to re-evaluate their skills. Similarly, almost 20% said that further learning and development have become a bigger priority for them since then. If you're looking to develop your project management maturity to further your skills or improve your organization's PMO function, we can help! There are several helpful courses, resources, and materials available online to level up your PM skills. Remember, knowledge is power.

Project Management Basics for PMOs

1. *Project Management Principles and Practices*

Specialization: Coursera

This **specialization** consists of 4 courses and has an average rating of 4.7/5 from over 36,000 reviews. **Margaret Meloni** MBA and project management professional runs the insightful lessons. Courses include:

- Initiating and Planning Projects (5 hrs 20 mins)
- Budgeting and Scheduling Projects (5 hrs 20 mins)
- Managing Project Risks and Changes (5 hrs 20 mins)
- Project Management Project (6 hrs 40 mins)

2. **Project Management: The Basics for Success:** Coursera

Led by **Rob Stone**, PMP, M.Ed. this 8-hour **course** covers project management, team leadership, and people management. Topics include:

- The role that high-performance teams and leadership play in project management
- How to develop and strengthen high-performance teams
- The project lifecycle
- Planning and managing projects: best practices, competencies and skills
- How to assess progress and track project activities
- Proficient communication with all stakeholders

With 9,000 reviews and a rating of 4.6/5, this course is a more condensed option that is ideal for time-bound PMOs or those just getting started.

Coursera users can choose which courses they would like to complete and don't have to commit to them all at once.

Book: The Strategic Project Office (Second Edition)

In the second edition of **The Strategic Project Office**, readers receive step-by-step guidance for developing and maturing a PMO. With a focus on four key knowledge areas, the book includes learnings on:

- Governance and portfolio management
- Resource optimization
- Organizational change
- Performance measurement

Conference Paper: 'A Roadmap to PMO Excellence'

In Sam Farid's '**A Roadmap to PMO Excellence**', the author discusses why a PMO needs a roadmap, the important success factors, and the steps that global dairy cooperative **Fonterra** took to establish its own roadmap. For PMOs looking to develop their planning capabilities, this is a great starting point.

Conference Paper: 'Why PMOs do not deliver to their potential?'

PMO success comes from having a clear vision. In this conference paper, Ori Schibi explores why PMOs so often fizzle out despite their initial promise. Moreover, it presents solutions to these problems, helping PMOs that are on the wrong path to correct and get back on track.

You can **read it in full, here**.





Learn From Real-Life PMOs: a Planisware Case Study

The transition from PM to PMO is an important one to get right — with significant repercussions if you or your business are behind the curve. While you can prepare by learning from courses and other resources, looking at real-life examples and case studies of PMOs in action is another great way to glean new knowledge. The decisions they make and the results they've seen can be a source of inspiration for your own work.

Take one of Planisware's engineering clients as an example. This client manufactures commercial trucks, buses, and engines. It has more than 14,500 employees worldwide and works with a network of a thousand dealers across 90 countries. The company has approximately 150 active projects over several departments at any given time. This presents a complex matrix of changes for any PMO to navigate. To keep up with the fast-paced demands of each project, the organization required a mature and agile approach to PPM and, in turn, an effective, strategic, and skilled PMO.

So, what were the company's project management challenges?

- The organization managed its resource forecasting with intricate Excel files and homegrown solutions. But, with many evolving programs and departments, the task called for a specialized transformation solution.
- The client had been using the same, outdated resource planning and program planning software for more than a decade. This created a demand for improvements.

- The use of many different spreadsheets caused limitations, created **duplicate work** with the need to manually enter changes, and made it difficult to find and organize items.
- There were **no standard workflows** for approvals and reviews, so different teams and departments created workarounds. This relied on outside software that was inefficient and time-consuming.

The client needed to modernize its project management by building a mature and agile PMO. To do this, the business decided to deploy Planisware as its enterprise-wide PPM tool. Its goals included:

- **Save time** and energy
- Create a new era of better collaboration
- Develop a single source of truth with accessible data
- End external workflows
- Remove duplicate efforts and information
- Increase visibility of resources, risks, and potential barriers

The PMO decided to deploy Planisware to streamline workflows, end reliance on spreadsheets, and enhance accountability. It was a wise decision.

Our PPM solution enables quick searches, real-time access to schedules, and faster estimations. What once took 2 or 3 days to do is now achieved in a matter of minutes. Since shifting to Planisware's real-time information and eliminating manual integration and data entry, the client has seen a significant change in pace.

Before Planisware, there was a lot of data entry duplication. With 2500 users, it was common for Chief Engineers to ask for help when making changes to the system. Now, the PMO **no longer has to manage data entry** and instead can spend time prioritizing the bigger picture and focusing on the strategy.

R&D and Finance teams use Planisware's unified data repository, eliminating the labyrinth of spreadsheets and simplifying expense estimates. It was previously difficult for the finance team to estimate variable expenses because so many programs have variable costs. Now, they can see estimates for program variable costs and analyze whether they are realistic or not. With Planisware, **finance** leaders can see all variable expense forecasts in one location, removing external workflows and, instead, triggering an automatic email with a change request.

The client's leadership can foresee and tackle any bottlenecks, optimize resource allocation, and pre-empt crises. In fact, R&D and planning estimation has improved by 40%, with improvements in efficiency, accuracy, timesaving and productivity.

Planisware has provided value to the client's teams across the board. But for PMOs in particular, what are the key takeaways?

- Enjoy a more manageable workflow.
- Eliminate unnecessary third-party technology and documents (including spreadsheets).
- Ease and improve cross-team collaboration.
- See more accurate forecasting (which benefits you and the overall business).
- Use automation to streamline, speed up, and scale processes.

By modernizing your tech stack, increasing visibility, and maturing your PMO skills, you and the wider team will flourish.

Armed with the knowledge, skills, and mindset shift you need to deliver success, you are ready to make the transition from project manager to project management officer.