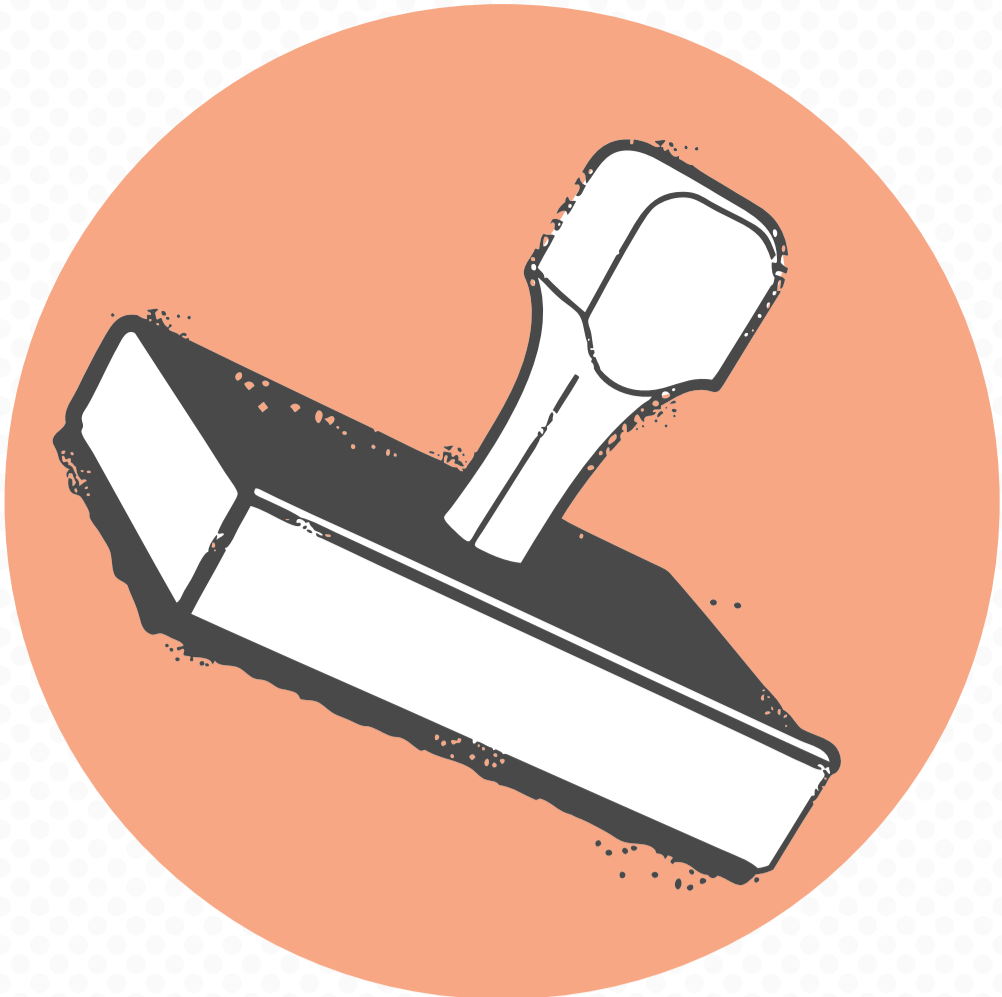


OPTIMIZE PROJECT Intake, Approval, and Prioritization

GIVE YOURSELF THE VOICE TO SAY:

NO *OR* **NOT YET**

TO NEW REQUESTS.

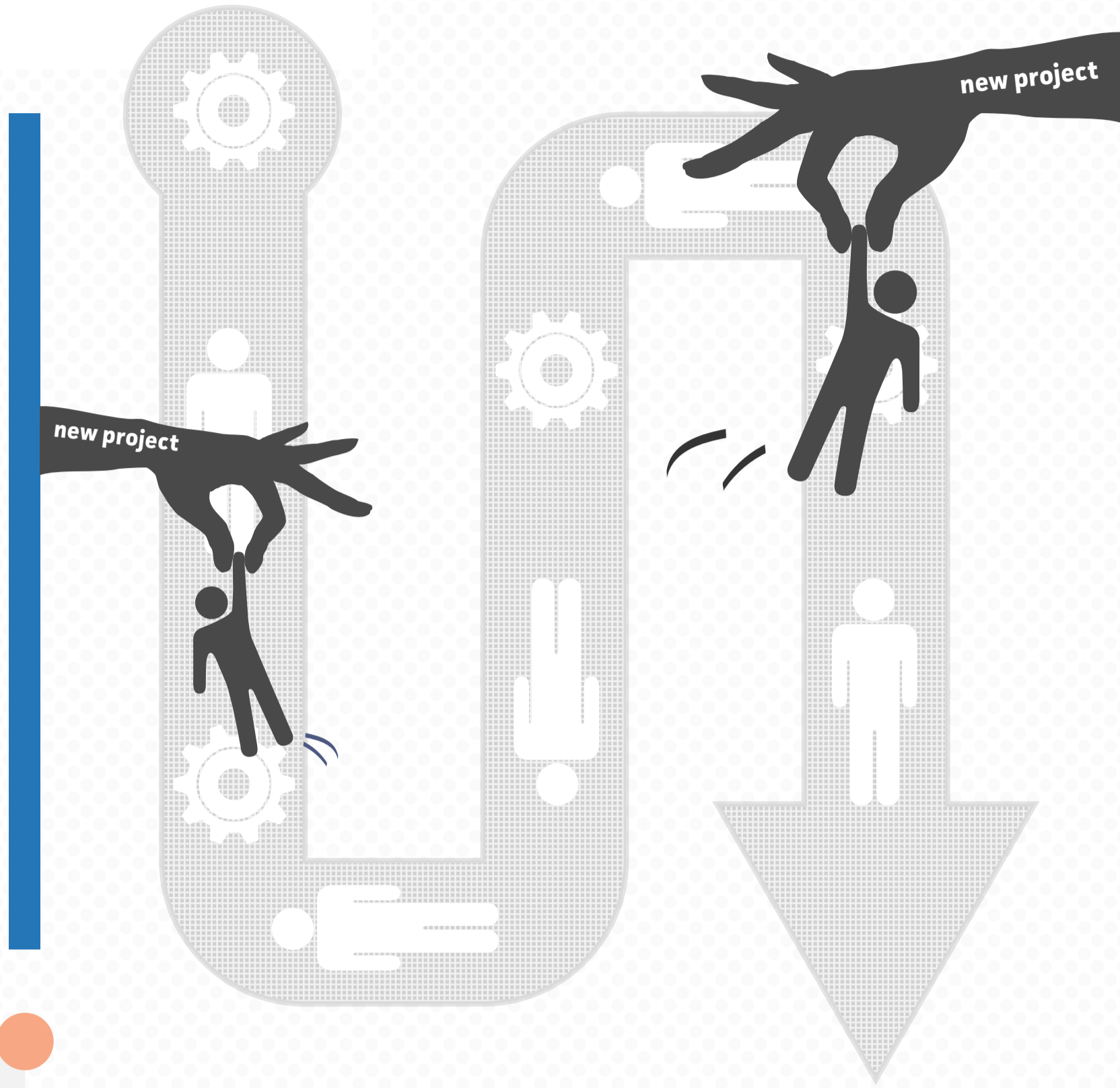


AS A PORTFOLIO MANAGER,

you do not have the authority to decline or defer new projects—but you also lack the capacity to realistically say yes to more project work.

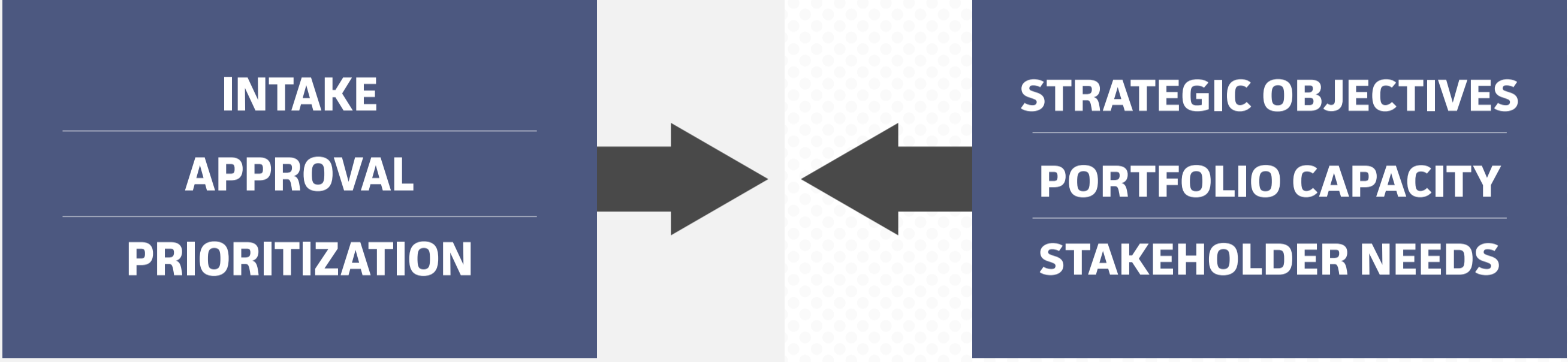
With your staff constantly being pulled into reactionary support roles, you not only have trouble completing all the projects currently underway, but you also have trouble starting any of the projects in your ever-growing backlog.

Ad hoc or “off the grid” projects frequently circumvent the formal intake processes that you have in place, robbing your already in-flight projects of precious resources and threatening your portfolio’s strategic alignment with business goals.



GIVE YOURSELF THE AUTHORITY TO SAY “NO”

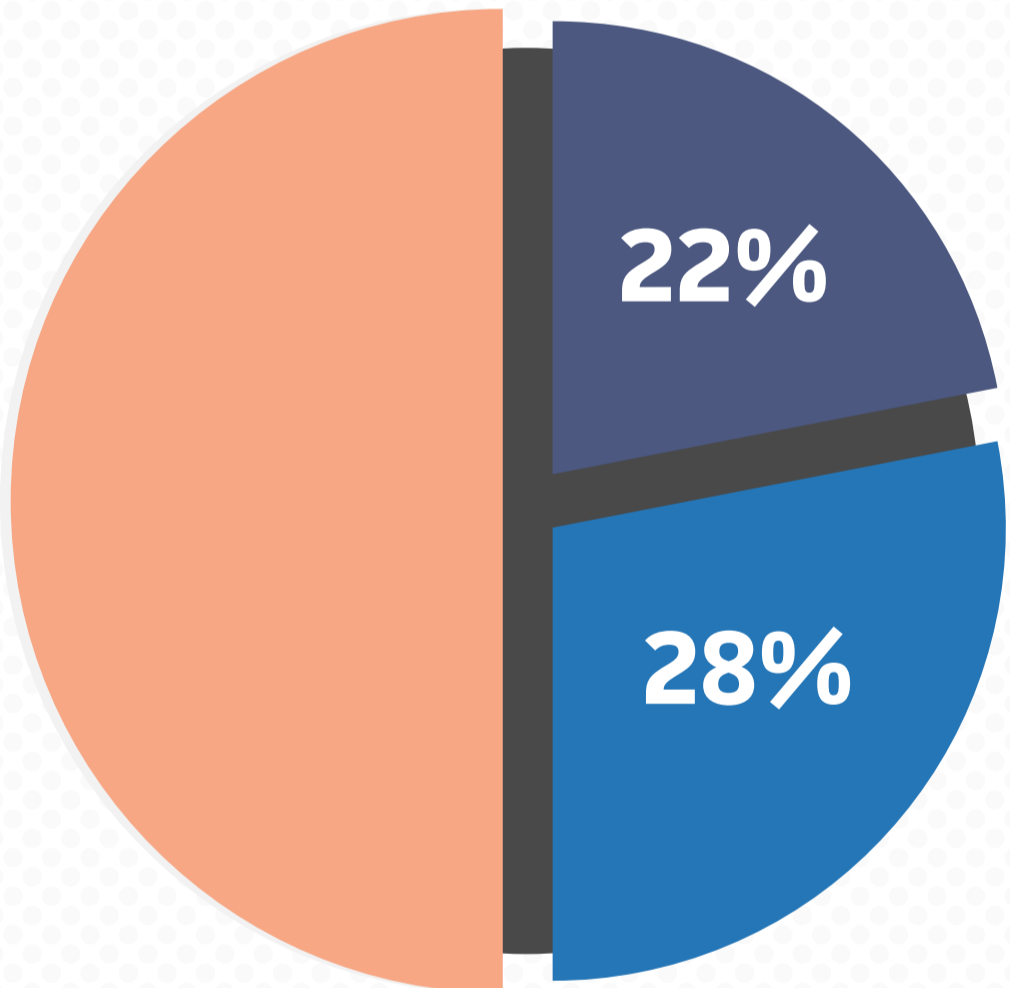
(or at least “not yet”) to new projects by aligning intake, approval, and prioritization with the defining constraints of strategic objectives, portfolio capacity, and stakeholder needs.



With intake processes geared toward these ends, you can ensure that the PMO is always driving the throughput of the highest-value projects in the portfolio and that the business side has visibility into IT’s capacity and processes.

FOR MOST ORGANIZATIONS,

the appetite to approve more projects is increasing while the propensity to invest in an appropriate level of IT resourcing is on the wane. This tension of wanting more from less suggests that IT departments need to be far more disciplined in choosing what to initiate.



WASTING 22% OF THEIR PORTFOLIO CAPACITY

on cancelled projects, failing to assign work, and fixing defects in previous work. They believe they may be

WASTING AN ADDITIONAL 28% OF THEIR PORTFOLIO CAPACITY

on inefficient processes and assigning the wrong resources. Optimized project intake, approval, and prioritization represent your best opportunities to eliminate this portfolio waste.

PROJECT STEPS

1 Make the Case



With optimized intake, approval, and prioritization, you can set the portfolio up for success by ensuring that you are spending time and resources on the most valuable projects.

outcome:

A measured value assessment that will help you establish the benefits of optimized intake and prioritization for your organization.

3 Streamline Intake to Control Stakeholder Expectations



Intake processes that add unnecessary complexity and excess red tape to requests can lead to underground project economies that will rob your already in-flight projects of precious resources and threaten the stability of your portfolio’s strategic alignment with business goals.

outcome:

A streamlined intake process that sets realistic stakeholder expectations for approval and that protects the portfolio from off-the-grid projects.

5 Prioritize Projects to Support Business Objectives



Portfolio managers need to prioritize what to finish next as opposed to what others think they should start next. Prioritization represents the best opportunity to respond to stakeholder and organizational change in order to effectively align the portfolio with the goals of the business side.

outcome:

A framework for project prioritization as well as a customized prioritization tool that will help ensure the strategic alignment of your portfolio as well as assist with intake and backlog management.

2 Assess Current State of Your Intake, Approval, and Prioritization Processes



It’s not enough to ensure you have the resource capacity to deliver what you approve. You also need to ensure you have a strategy for accommodating ad hoc, mandated projects that stakeholders impose without sacrificing strategic objectives.

outcome:

An evaluation of your current intake capabilities and a feasible target state for intake optimization.

4 Factor Resource Capacity When Approving Projects



The approval process needs to be honest about project uncertainty and set realistic expectations about what the portfolio can deliver and when it can deliver by. In many ways, project success begins with being open and honest about limitations.

outcome:

A method for stage-gating the approval process to help ensure that the time spent developing business cases supports the throughput of the highest value projects.

6 Institute Intake Process Change Throughout the Organization



Good initiatives fail when organizational change is mishandled. Implement your new intake processes in a way that anticipates objections and prevents those objections from gaining any organizational momentum.

outcome:

A communications strategy and template to help convey intake flow and sell its benefits to stakeholders.