

Planning for disruption:

A toolkit for IT PMO leaders

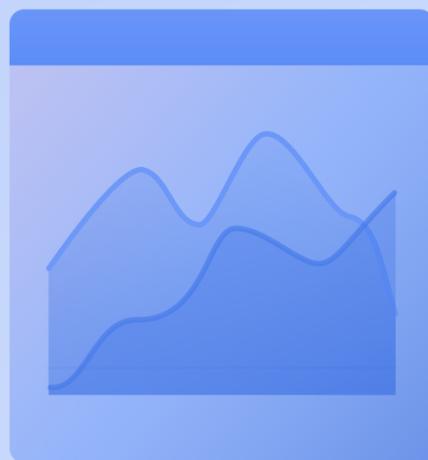
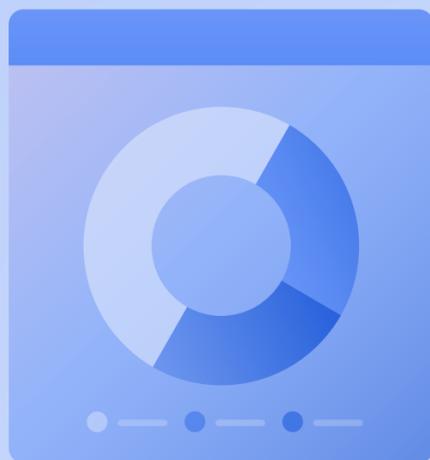
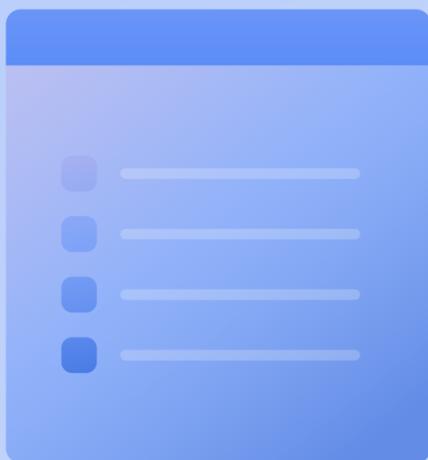
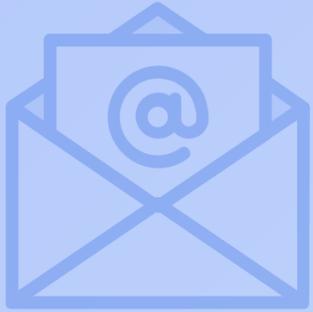


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Introduction



241

million emails were sent **every minute** in **2023**

The average enterprise device now has **more than 65 applications** installed. Unsurprisingly, the AI market is expected to **top \$405 billion by 2027**. And at the heart of all this digital transformation is the Information Technology Project Management Office, or IT PMO.

AI Market to top

\$405

billion by 2027

The IT PMO is responsible for providing oversight and rules of engagement to manage technology-related projects effectively. It's the keeper of related project management best practices, processes, resources, and tools.

Modern IT PMO leaders must ensure that all technology investments support business objectives and are used optimally throughout the organization. They must also strike a delicate balance between protecting the business and enforcing compliance while empowering teams and encouraging innovation.

IT and business leaders' top priorities for the next twelve months:

45%

say operational efficiency

44%

list digital transformation

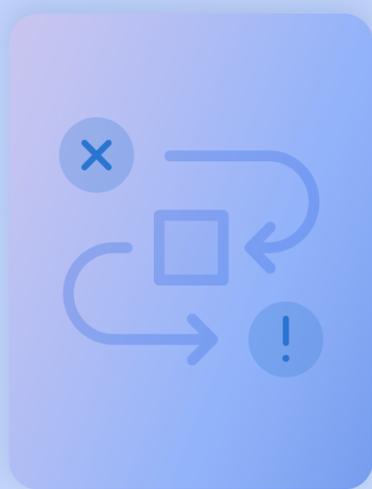
Source: *The Power of Next-Gen Project and Portfolio Management*

From user provisioning to data migration, systems onboarding to systems integration, and technical support to asset management, the IT PMO is consistently being asked to do more and move faster. Juggling this ever-growing list of responsibilities and keeping pace with technological acceleration is a major challenge.

Fortunately, thriving through disruption is possible with the right plan in place. And regardless of your IT PMO's specific duties, all work benefits from optimized **demand intake, portfolio prioritization, and project sourcing & planning**. However, these foundational components are also some of the most difficult to get right.

The rest of this guide will dive into the challenges and opportunities behind each of these three essential elements, as well as provide proven tips and actionable templates to help you plan for disruption and achieve success.

Optimize these three essential jobs-to-be-done:



**Demand
intake**



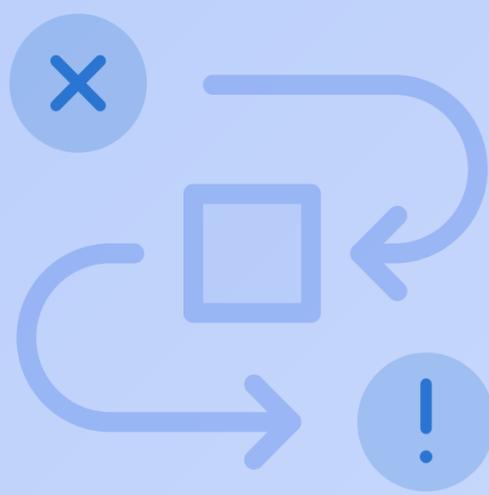
**Portfolio
prioritization**



**Project sourcing
& planning**

Demand intake

Whether you're fielding technical support tickets or helping implement a new marketing software, most IT projects start with a request. This first step often sets the tone for the rest of the project, so it's important to get it right. Failure to do so can have major downstream consequences, including missed deadlines and burnt out team members.



Scattered requests

Time lost chasing details

Missed deadlines

Common challenges

Requests live scattered across tools including Slack, email, and Jira

Missing information around key dependencies, project goals, due dates, and more

Difficulty tracking and poor visibility into ticket and request status



Key consequences

Lost requests, improper project prioritization, and duplicate work

Scope creep, rework, and time spent chasing down details before getting started

Unresolved issues and difficulty showcasing impact and forecasting future needs



Improvement opportunities

- **Choose a single point of entry for all tickets and requests** – even if they originate from different tools. This not only prevents teams’ needs from slipping through the cracks, but also makes it easy to identify duplicate requests up front and prioritize projects in the context of one another.
- **Standardize your intake format** to ensure that all necessary information is captured upfront with every request. Make important fields mandatory, and revisit the form over time as you identify additional parameters that help your team hit the ground running. Last but not least, include a link to your team’s service-level agreement (SLA) to set requester expectations and avoid scope creep should the request evolve over time.
- **Create a demand intake dashboard** to monitor incoming, open, and resolved requests at a glance. Give requesters access to track the progress of their requests, as well as see what other tickets your team is working on at any given time.



Pro tip!

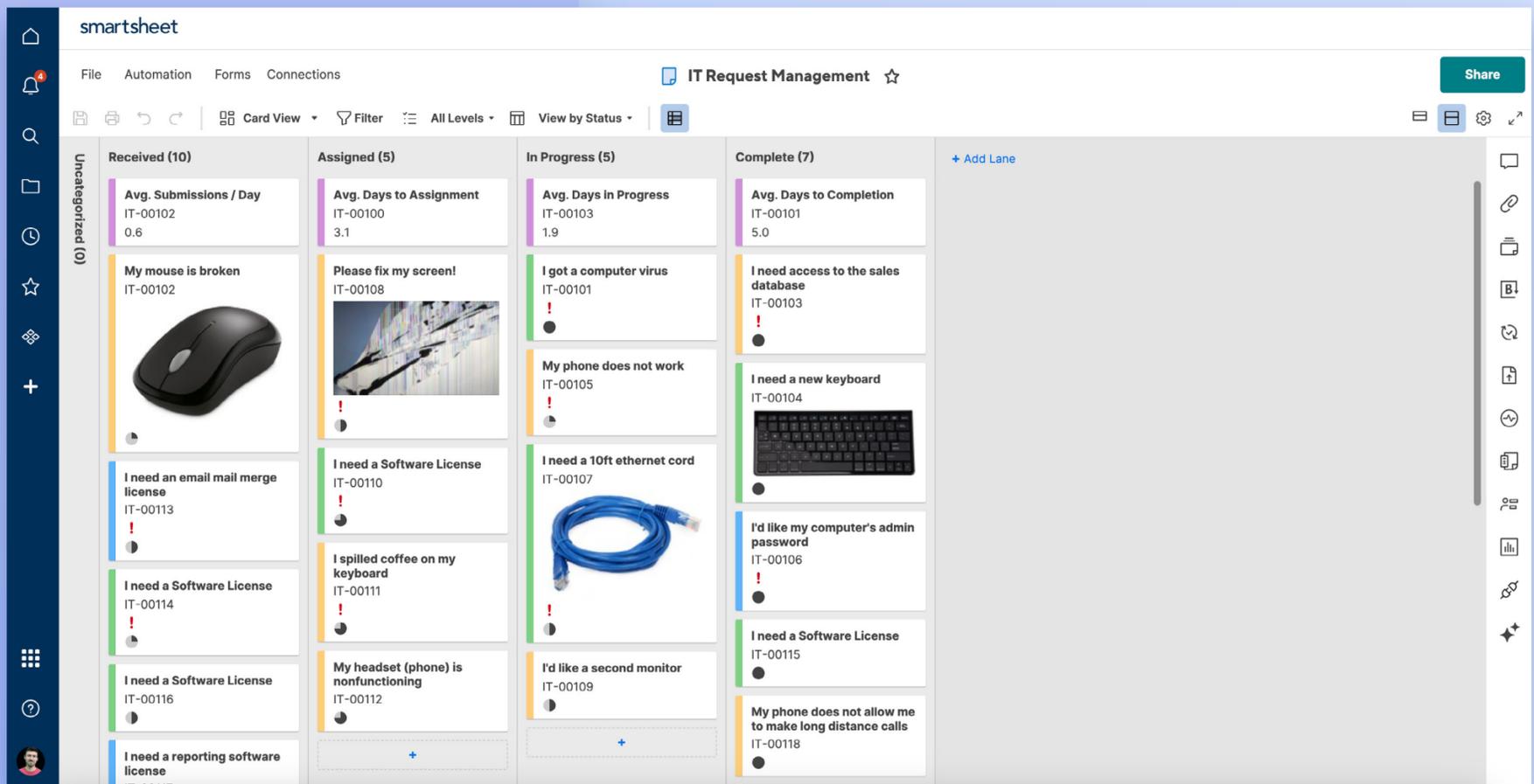
The best work management platforms for IT PMO offer intake forms with conditional logic built in. This allows teams to capture the exact information they need for different requests (and none that they don't!) by showing relevant fields based on requesters' answers to specific questions.

 [Learn more](#)

Try this template

- Visually manage and track IT requests in card view
- Improve visibility by viewing requests by status, priority, or owner
- Streamline the IT ticketing process with a simple intake form

[Get started](#)



Portfolio prioritization

Portfolio prioritization refers to the ranking and selection process of work that involves IT resources. Prioritizing projects in an IT environment is a critical exercise that requires special considerations, since it essentially determines the areas where IT will add value to the business.

Common challenges

Lack of visibility into larger organizational goals

Inconsistent and/or subjective evaluation criteria

Conflicting priorities and unrealistic expectations

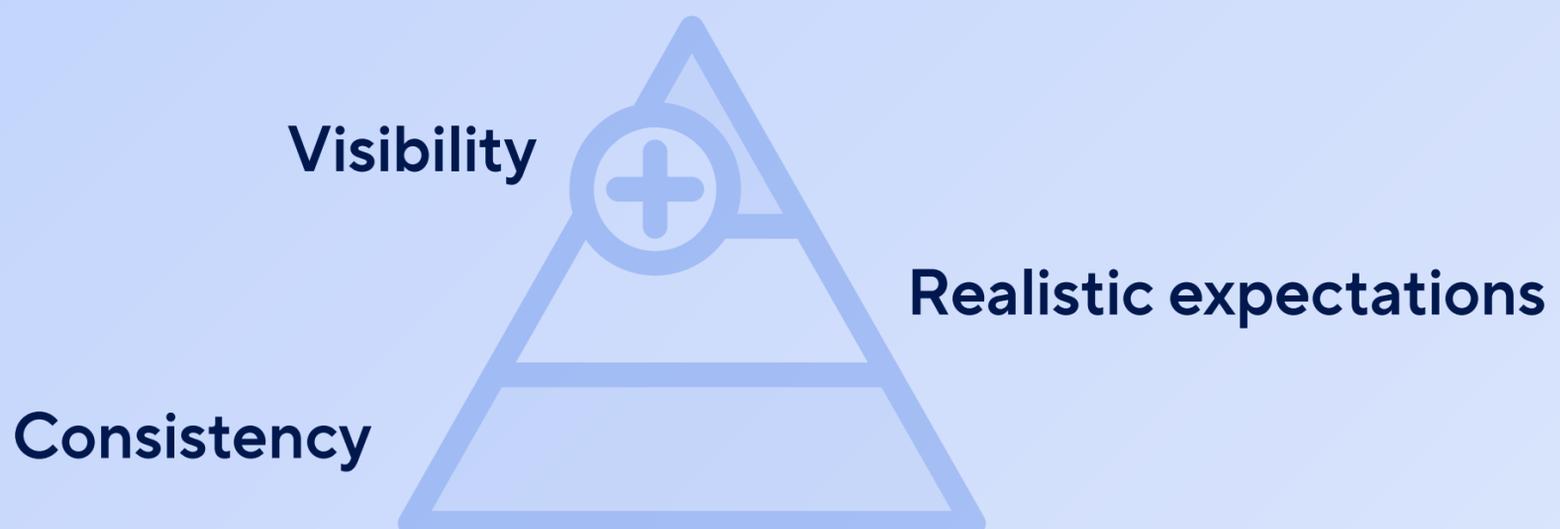


Key consequences

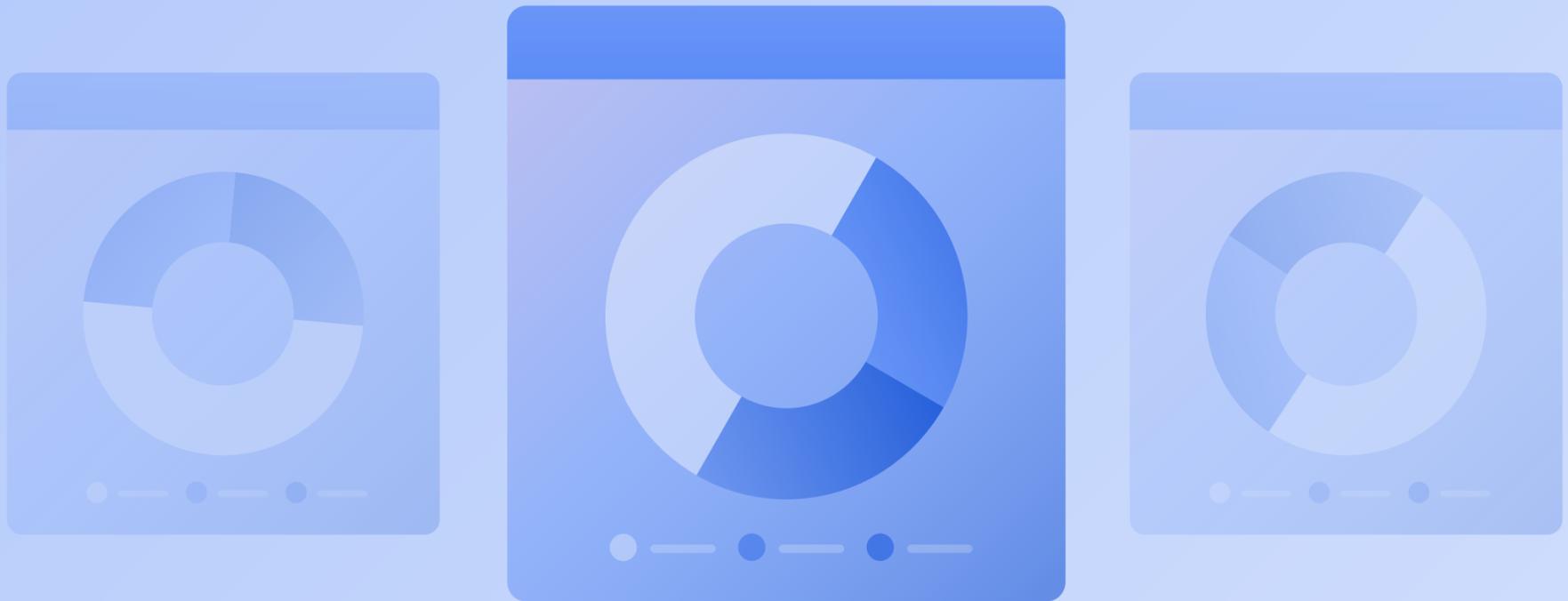
Misplaced resources and decreased value contribution

Misalignment around the most important work and reduced impact

Frustrated, overworked teams and unmet goals



Improvement opportunities



- **Clearly document and centralize** your organization's quarterly goals, and ensure that all IT work ladders up to these strategic initiatives. Roll resulting IT priorities up into a report that clearly shows how their progress contributes to the company's stated objectives. Any pending projects or incoming requests that do not align should be deprioritized or raised to leadership for approval.
- **Establish a standardized set of objective prioritization criteria** that includes factors such as revenue potential, competitive differentiation, and cost reduction. Determine the appropriate weight for each factor, and then score each potential project based on these criteria to determine which will have the most impact.
- **In addition to business value factors, include criteria like risk and resource requirements** in your prioritization scoring framework. This will help balance the impact of a project with the probability of success. It will also highlight potential conflicts that may set your team up for failure, such as a single specialized resource being required for multiple priorities at once.



Pro tip!

Leading work management platforms make it easy for the IT PMO to clearly align all projects with corporate initiatives. Progress can be automatically updated and monitored via dashboards and reports, so IT teams can ensure that they're delivering maximum value and getting the executive recognition they deserve.



See how Iron Mountain does it

Try this template

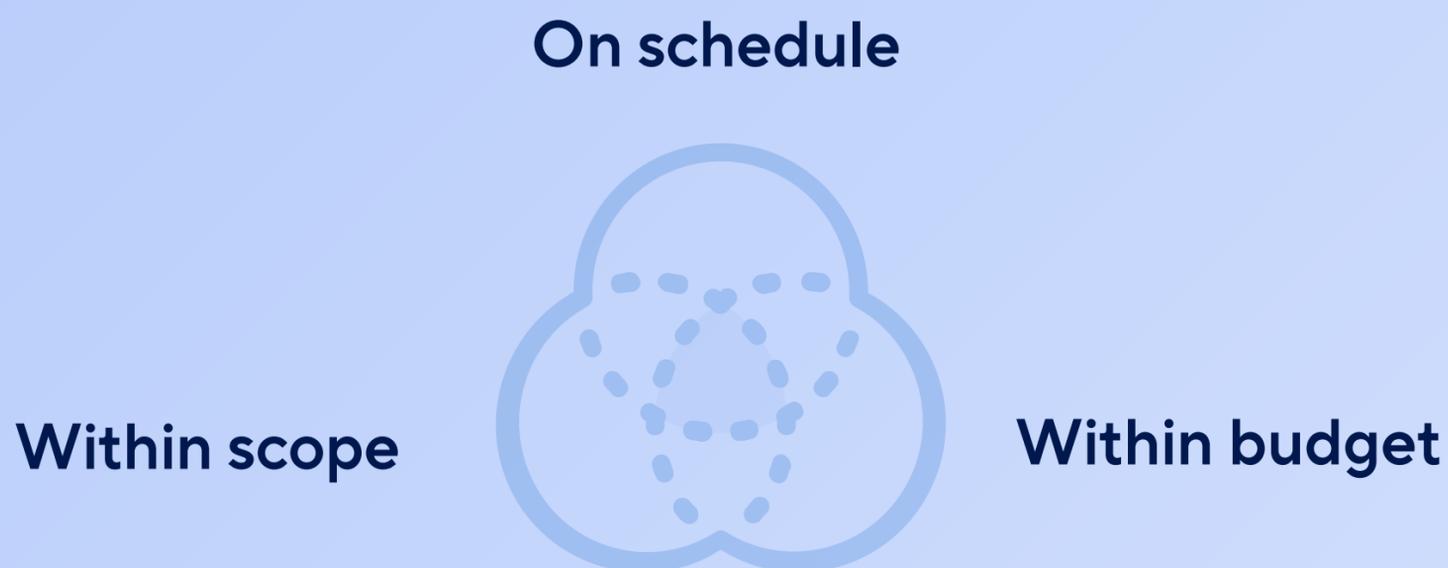
- Customize prioritization criteria and weights to fit your needs
- Compare projects to one another to spot potential conflicts
- Use the project timeline to track prioritized projects in progress

Get started

	Approv...	Requirement	Project Lead	Details	Business Value Added	Business Risk	Implementation Challenges	Resources Required	Compliance	Relationship to requirements	Urgency	Competitive Edge	Total Score	Conflict?	-	Cri scc
1																
2	<input type="checkbox"/>			CRITERIA WEIGHT										TOTAL WEIGHT		
3				(TOTAL SHOULD EQUAL 100)	10	20	10	10	20	10	10	10	100			
4	Approved	REQUIREMENT	PROJECT LEAD	DETAILS	BUSINESS VALUE	BUSINESS RISK	IMPLEMENTATION CHALLENGES	RESOURCES REQUIRED	COMPLIANCE	RELATIONSHIP TO REQUIREMENTS	URGENCY	COMPETITIVE EDGE	TOTAL SCORE	CONFLICT?		
5	<input type="checkbox"/>	Project Alpha	Kyle	Update user information security	2	3	2	3	1	0	5	2	44	YES		
6	<input checked="" type="checkbox"/>	Project Beta	Anthony	Operating system upgrade for all office staff	5	5	2	4	3	5	5	5	84	NO		
7	<input type="checkbox"/>	Project Gamma	Mariana	Redesign app UI	5	4	5	4	1	2	4	5	70	YES		
8	<input checked="" type="checkbox"/>	Project Delta	Kyle	Database switch	5	5	5	3	5	2	4	5	88	NO		
9																
10																

Project sourcing & planning

Despite so many technology advancements, the ability to get work done still depends on how well teams manage three critical resources: people, money, and time. Project sourcing and planning helps bring the best teams together to deliver work in scope, on schedule, and within budget.



Common challenges

Misalignment between required skills and available resources

Poor visibility into resource requirements across projects

Failure to anticipate future hiring / staffing needs



Key consequences

Low productivity, project delays, and frustrated stakeholders

Staffing conflicts, project delays, and cost overrun

Overworked teams, high turnover, and difficulty scaling

Improvement opportunities

- **From data analysis to computer programming**, IT roles are highly specialized. This makes anticipating the skills required to tackle specific projects extremely critical. Factor in both hours and expertise when planning future projects, and consider using external contractors or agencies to fill any major gaps.
- **Most IT teams must answer support tickets**, troubleshoot technical difficulties, and complete other variable tasks. If you have the data available, run a report to see how many hours your team spent on ad hoc requests over the last quarter, and use this to guide your target utilization rate for planned projects moving forward, as well as anticipate hiring needs. Otherwise, try starting with the 80/20 rule and leave 20% of IT hours free to handle the unexpected.
- **Today's teams are consistently being asked to do more** with fewer resources. Plan for growth and look for ways that AI and automation can take on your team's repetitive, day-to-day tasks so that they're free to focus on more strategic work. However, be careful not to overestimate the power of these developing technologies, which still require some level of human supervision.





Pro tip!

Capacity planning is a complex yet critical piece of project sourcing & planning. It involves managing team availability and skill sets across entire portfolios of projects, and is a feature that only the most sophisticated work management platforms provide.

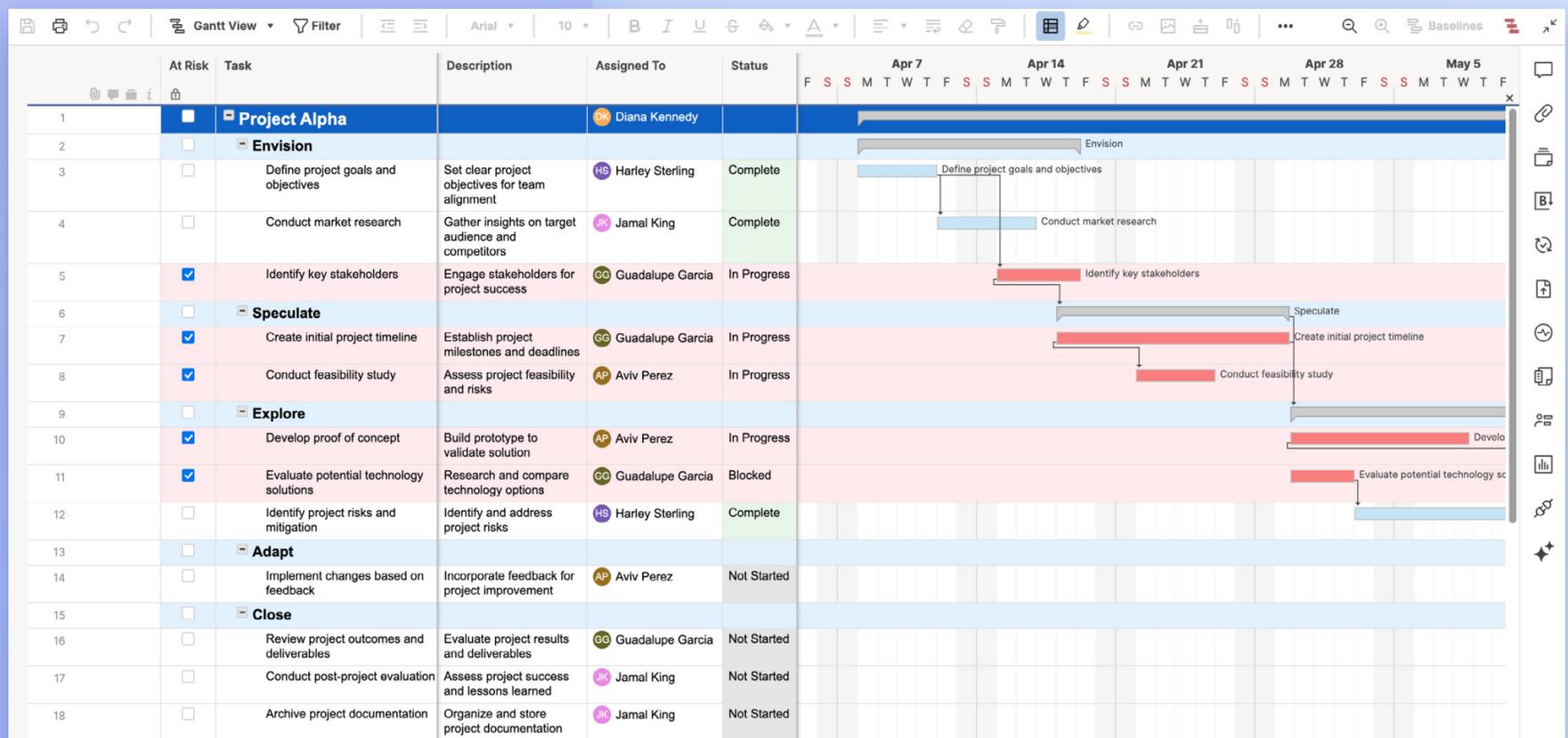


Learn more about capacity planning

Try this template

- Estimate costs across your portfolio
- Compare total cost to available budget
- See the real-time impact of budget changes

Get started





Plan for success

The modern IT PMO must both protect and empower their organizations in the face of rapidly multiplying applications, unfathomable quantities of data, and unprecedented technological advancements. The best way to navigate this disruption is to have a flexible, future-proof plan in place that takes growing demands, shifting priorities, and required resources into account.

While using templates like the ones provided in this toolkit is a great place to start, leading IT PMOs at companies like Syngenta and Oerlikon turn to the Smartsheet platform for enterprise collaborative work management to plan, execute, and measure work at scale.

Find out how Smartsheet can help you achieve more:

Watch this video

