OPERATIONS INSIDER

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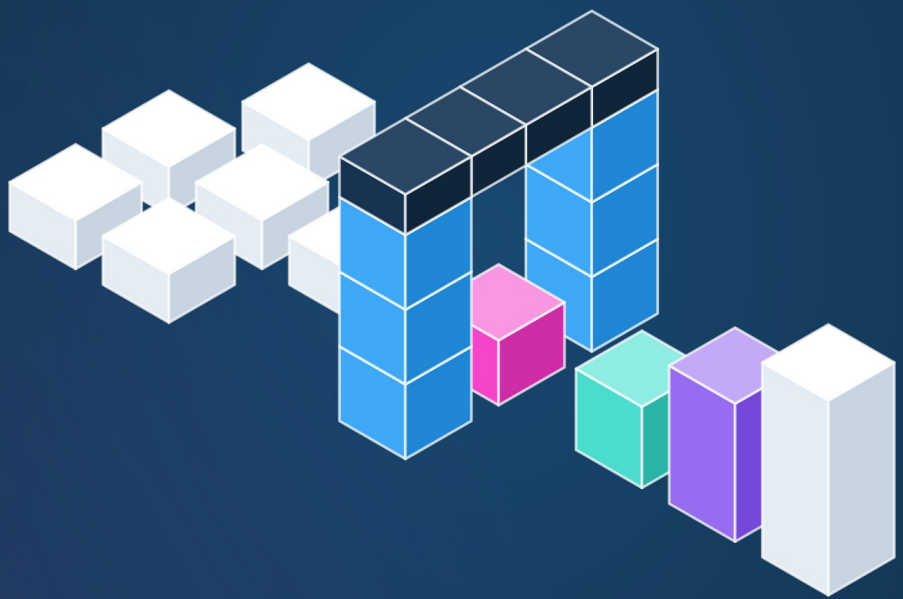
PROJECT PORTFOLIO AND PMO QUICK START CHECKLIST

Score how your site steers its projects in one hour, with documents you can point at.



SEE. RANK. FIT. DECIDE.

START HERE

How to Use This Check

One site, one hour with the plant manager and two department heads, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Open the real documents: the project list, the last status reports, the minutes of the last management meeting and the calendars of your key engineers.	Score each statement from 0 to 4. Without a list, a report or a decision log you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across departments.
3	Mostly in place and visible in the documents.
4	Consistently in place, visible, reviewed and improved.

> **WHY THE PORTFOLIO**
>
> **Most plants do not suffer from bad projects. They suffer from too many good ones at the same time. The same few engineers sit in all of them, every project waits for somebody, and nothing gets finished. The portfolio is the place where that is decided.**

Before You Start

- **Scope:** one site or one business unit with its own management team, typically 10 to 60 projects.
- **Evidence:** the project list, status reports of the last two months, budget figures, minutes and the list of projects closed last year.
- **Tone:** you check how the site decides, not how well a project manager works. Ask who said yes to a project, and when.

THE CHECK

01 One Register for All Projects

NO.	CHECK	SCORE 0 TO 4
01	A written definition says what counts as a project, with thresholds for effort, cost and departments involved, and what stays line work.	
02	Every project of the site is in one register with sponsor, project manager, objective, benefit, budget, dates and status.	
03	A search for hidden projects in the departments was done in the last twelve months, and its findings are in the register.	
04	No project uses people or money without a register entry and a start decision.	
05	The register is updated at least once a month, and one named person is responsible for it.	

02 Rank and Select

NO.	CHECK	SCORE 0 TO 4
06	Every project is rated with the same criteria: benefit in EUR per year, strategic contribution, urgency, risk and effort.	
07	Benefit figures are checked by controlling, and each benefit has a named owner in the line.	
08	A ranking exists, and every member of the management team names the same five most important projects.	
09	Must projects (law, safety, binding customer requirement) are marked, few in number and justified in one sentence each.	
10	Projects below a minimum score are not started, and at least one running project was stopped in the last twelve months.	

THE CHECK

03 Match Capacity and Demand

NO.	CHECK	SCORE 0 TO 4
11	The bottleneck resources (key people and functions) are named, and their capacity for projects is known in person-days per month.	
12	Every project states its demand per bottleneck resource and month.	
13	Demand and capacity are compared for the next twelve months, and overload is visible per resource and month.	
14	A new project starts only when its bottleneck resources are free. The others wait in a ranked queue.	
15	The number of active projects has an upper limit, and the limit is kept.	

04 Decide and Report

NO.	CHECK	SCORE 0 TO 4
16	A portfolio board meets in a fixed rhythm and decides: start, stop, defer, change the rank.	
17	Every project passes a few defined gates with written criteria, and a gate has ended with a no in the last twelve months.	
18	Every active project reports once a month on one page, with the same layout and the same traffic light rules.	
19	One portfolio overview shows all projects with lights for schedule, budget and benefit.	
20	Decisions of the board are logged with owner and due date, and open decisions are followed up at the next meeting.	

THE CHECK

05 Support and Learn

NO.	CHECK	SCORE 0 TO 4
21	A project office role exists, even part time, with written tasks: register, standards, capacity sheet and board preparation.	
22	All project managers use the same few templates, and new project managers are trained on them.	
23	Dependencies and conflicts between projects (results, people, assets, time windows) are recorded and reviewed every month.	
24	The benefit of each closed project is checked against the plan after 3, 6 and 12 months by the benefit owner.	
25	Lessons from closed projects have changed a template, a rule or an estimate, and the portfolio key figures are reviewed every quarter.	

Your Result

BLOCK	POINTS	OUT OF
01 One Register for All Projects		20
02 Rank and Select		20
03 Match Capacity and Demand		20
04 Decide and Report		20
05 Support and Learn		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your project work is decided and how much just happens. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Crowded. Nobody knows how many projects run. Every department starts its own.	Define what a project is. Collect every undertaking in one register.
40 to 59	Listed. A list exists, but everything on it has priority one.	Rate all projects with the same criteria. Count the capacity of your key people.
60 to 79	Steered. A board decides by rank and capacity, reports look alike.	Add gates, record dependencies, check the benefit after close.
80 to 100	Focused. Few projects run, they finish on time and the benefit is confirmed.	Hold the level. Use the key figures to raise the throughput.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after three months and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
PROJECT PORTFOLIO AND PMO STARTER KIT	The guide for the first 30 days, plus the portfolio register in Excel with scoring, ranking, portfolio chart, capacity check and overview.
PROJECT PORTFOLIO AND PMO EXCELLENCE BUNDLE	The full playbook, a two-day workshop pack, eight templates, the Excel system with gates, status report, dependencies, benefit tracker and key figures, and a workshop deck.

Both are available at operationsinsider.com.