

7.2 Tools for creating a project management office in conditions of instability

Innovative projects require in-depth knowledge in various fields such as economics, construction, finance and personnel management. Implementation of ideas is always associated with certain changes that must be effectively managed. For this, a specialist with relevant knowledge is appointed - a project manager.

Project management is a professional activity that consists in the application of modern methods, knowledge, tools and technologies for effective use of resources and coordination of people's work to achieve set goals. Project management covers all aspects of general management, focusing on the development and implementation of unique solutions for specific tasks.

Creating a project office is an integral part of a modern approach to project management. Its main goal is to ensure effective organization and coordination of work on projects within the company. The project office analyzes, selects, and prioritizes projects, helping the organization focus on those that best align with its strategic goals. It also monitors the available resources—human, financial, and technical—and optimally allocates them to improve the efficiency of project implementation.

From the generalization of scientific approaches, it can be concluded that the key tasks of the project office are: project management; monitoring compliance with deadlines and budgets; conducting trainings and developing competencies of project managers and teams; providing reporting and analysis of project results; establishing communication between performers and stakeholders [281-284]. Thus, the project office acts as an important tool for achieving the strategic goals of the company through the effective management of project activities.

Modern research in the field of project implementation shows that most of them are not included in the planned budget, time or investment indicators. The main factors that negatively affect the achievement of the goals set for project teams are:

- weak communication between participants;
- shortcomings in planning the use of resources;

- lack of quality control;
- loss of control over costs;
- shortcomings of general management, etc.

The purpose of the study is to reveal the content of the key tools for building a project management office, which are based on taking into account modern management technologies and the acquired experience in the field of project management.

To effectively build a project management office, it is advisable to choose a transitional model between the controlling and supporting form to ensure maximum efficiency. The task is to develop a number of artifacts that should ensure the high-quality functioning of the project management office.

First of all, the focus is on planning resources, projects, teams, etc. Resource planning is the process of determining how the business will allocate resources to a project (for example, assigning tasks to individuals based on their skills and capabilities). Project managers use resource planning to ensure efficient use and predict future needs. Effective resource management is an important and necessary process that companies should invest in because it provides numerous benefits, including cost savings, time savings, and increased customer satisfaction. A key part of effective resource planning is the resource management plan, which is a document or tool that describes the organization's allocation and use of resources within a project. The plan can identify a strategy for attracting and allocating the workers, equipment, and physical space needed to complete the project. In addition, it may include resource planning and monitoring processes, key personnel responsible for resourcing the project, and a list of all known resources needed to complete the project.

The resource management plan must be transparent and accessible to every team member so that all project participants have a common understanding of resource needs. It is important that this document is updated in real-time or regularly throughout the duration of the project. It acts as a key data source that allows you to track what resources have already been used, evaluate their effectiveness, and determine exactly what resources will be needed for the next stages of the project. Such information helps

project managers make informed and operational decisions, reducing the risk of shortage or overspending of resources.

Depending on the specifics of the project, its scope and industry, the content of the resource management plan can vary significantly. However, it usually reflects the key aspects listed below.

1) Assessment of PMO needs and goals. Determination of the main purpose of the office: centralization of project management, team support, quality control or standardization of processes; analyzing the scope of projects that the PMO will serve (number, duration, complexity).

2) Analysis of personnel needs: identification of key roles necessary for effective PMO work (manager, project managers, analysts, methodologists, administrators); competency assessment: determining the level of skills and experience employees need to achieve PMO goals.

3) Material and technical resources: space (office size, number of workplaces, conference rooms); hardware (computers, phones, servers and data storage systems; software: project management systems - Jira, MS Project, Trello; communication tools - Slack, Microsoft Teams; analytics programs - Power BI, Tableau, etc.

4) Financial resources include determining the budget for employee salaries, purchasing equipment and software, renting an office or furnishing workplaces, planning a reserve fund for unforeseen expenses.

5) The methodological base refers to the development of standards, procedures and templates for project management and providing staff training on selected methodologies (Agile, Waterfall, Hybrid).

6) Communication resources include such positions as defining channels for internal communication (e-mail, messengers) and creating a reporting and information exchange system.

7) Evaluation and optimization of resources occurs through constant monitoring of resource use, analysis of work efficiency and adjustment of plans.

Proper resource planning allows the project management office to effectively support teams and achieve the organization's strategic goals.

- [illegible]

Fig. 1. An example of high-level planning of resources according to projects

The table divides the projects with the corresponding numbering, indicates the teams that work directly on these projects, as well as their roles. Additionally, information that may be needed in emergency situations, for example, to quickly inform customers, is included.

Each team member is represented with the number of hours spent on the project. The maximum load corresponds to a standard working week - 40 hours. The table also takes vacation and sick leave information into account to adjust the actual number of available work hours.

Based on the collected data, key metrics are automatically or manually calculated to help project managers make effective management decisions. Such

planning is updated every week, which ensures the relevance of information about all changes, in particular regarding the availability of resources and the workload of teams.

During regular planning meetings, the following issues are resolved:

- settlement of workload conflicts: identification of overworked or underworked employees;
- planning of future projects: allocation of available resources for future tasks;
- discussion of potential problems: identification of risks related to resources and search for ways to solve them;
- improving the allocation of hours: implementation of optimizations that ensure a balance between projects and resources.

Larger and more strategic discussions are encouraged to be held during individual PMO meetings. At such meetings, the agenda is defined more flexibly and may include topics that go beyond the scope of the current work week. This allows you to consider global issues such as long-term planning, process improvement or project portfolio management.

This approach to planning ensures flexibility, transparency and coherence in the work of teams, allowing timely adaptation to changes and increasing the effectiveness of project management.

To effectively manage resources, use specialized tools that ensure centralization and simplify planning. One such solution is the JIRA environment with the Tempo plugin, a cost-effective yet powerful solution that streamlines team performance planning and analysis processes.

Tempo offers a number of useful features:

- centralized management, which allows you to control all plans and resources in one place;
- effective planning provides tools for organizing work, taking into account the availability of resources;
- convenient visualization: provides an opportunity to view all resources in a single window, using filters to search for the necessary employees or teams;

- prioritization of tasks allows you to allocate jobs in accordance with full-time equivalents (FTE), ensuring a balance between requests and available resources;
- planning optimization supports the organization of resources by skills, teams or availability, creating the most effective project execution plans;
- flexible resource management helps to take into account vacations, holidays, flexible schedules, as well as work with distributed or remote teams;
- scheduling for multitasking allows simultaneous scheduling of multiple resources for a single task or problem, which is a unique feature of Tempo Planner among Atlassian Marketplace tools.

Among the additional capabilities of Tempo, it is possible to single out integration with projects, which provides flexibility in planning, allowing to add to the system both individual tasks and general information about the project; ease of use, thanks to which the entire team can be planned in one interface, taking into account the necessary deadlines, which increases the convenience of resource management, and quick availability determination, which allows you to determine the availability of both local and geographically located resources.

Tempo Planner is an ideal tool for teams working on complex projects with a large number of participants, as it not only helps to plan resources, but also supports their efficient use at each stage of work. This solution greatly simplifies coordination between teams, especially when they work in a remote or hybrid format.

Another important artifact within the PMO, the project passport is a basic and strategically important document that contains all the necessary information about the project, its characteristics, dependencies and key aspects. It serves as a central source of data that ensures transparency and effective management of the project at all its stages.

The purpose of the project passport: storage and centralization of important information about the project, ensuring transparency for the team, stakeholders and management, supporting the management of changes, risks and resources, use as a reference document for decision-making.

The main components of the project passport:

- general information: project name, legal entity, cooperation model (Fixed Price, T&M), start and end dates, frequency of reporting and invoicing;
- planning and control: timeline, key stages (Milestones), change register (Change Register), meeting notes;
- documentation: NDA, description of the client's request, tools (JIRA, Trello), links to the repository and folders with documentation;
- team: roles, responsibilities, contact information, availability;
- scope and metrics: Scope of Work, KPI;
- risk management: risk register with response plans;
- financial aspects: budget and reserves.

The project passport is a basic tool for effective project management, which helps maintain the relevance of information and achieve set goals. Its advantages include the centralization of project data, facilitation of management and decision-making, and transparency for the team and stakeholders.

It is important to record and describe the entire project process in one place, which will serve as a base of basic information about how the team should work and play the role of a kind of project management standard in the organization. Each of the points, in turn, was adjusted to the specifics of this particular company.

In addition, there should be similar documents more focused on certain stages of the project, for example: project start, project completion, onboarding of a new project manager, work on a certain type of project (Fig. 2), etc.

Project onboarding is the process of attracting resources to the project. The goal is to ensure that everyone involved in the project understands its business goals and requirements, knows their role and the expected outcome of the project itself. This way, team members can fully contribute to the project, spending less time trying to figure out the tasks and more time actually doing them.

When embarking on a project, managers should focus on imparting knowledge about the project to their team. This is the time when they make the final decisions about their team, choosing the best management tools.

STRUCTURAL CHANGES, UNCERTAINTY, WAYS OF DEVELOPMENT OF THE ECONOMY, MANAGEMENT AND TOURISM

ЗРОБІТЬ КОПІЮ ЦЬОГО ДОКУМЕНТУ, ПЕРЕД ВИКОРИСТАННЯМ, ЦЕ ТЕМПЛЕЙТ			
PROJECT	To do for new Project manager:		To do for current Project manager:
Basic			
What is it about?	Коротко про суть, ідею проекту (важливі посилання, цікаві статті)		
Active Collab	Active Collab (посилання, перевіряємо задачі, нотатки, чи є основні лінки, дивимось до Project start checklist пункт 3)		
Google drive організація	Production, docs, перевіряєм всі інвойси, де контракт?, де NDA? Де делівері клієнту? Де внутрішні файли? Гарна організація в межах папок		
Slack	Внутрішній		
Scope:	Чи він детальний, як описаний (критичне питання, чи є якась дока (List of screens), чи user stories, scope statement , що покривається в межах нашого таймлайну, чи є якісь вже очевидні ризики з ним (приклад кейсу: потрібно пріоритизувати scope, бо мінімальна межа бюджету покриває лише пріоритетні скрині)?		
Таймлайн, дедлайни, майлстоуни	У датах		
Залученість команди	(у FTE/годинах на тиждень), ментори можливі		
Бюджет	(обмеження?), як формувався бюджет (рейти і тд), модель співпраці (dedicated, T&M, fixed і тд), ріпортинг формат (чи є пульс/ріпорт документ), білінг (як entity використовується, де інвойси лежать, як часто виставляються), кому надсилаються інвойси та ріпорти (приклад листа)		
Мітинг ноутс	рекомендовано зберігати у нотатці на колабі, де зберігаємо. Приклад		
Записи дзвінків.			
Change management	вигляд форми для запиту змін і тд		
CLIENT			
Stakeholders record	Стейкхолдери <u>рекорд</u> (навіть, якщо там одна людина, він має бути створений), хто є основний РОС, хто є decision maker і всі деталі стосовно цього		
Timezone + місце розташування клієнта	Нью-Йорк, США		
Тулзи, які використовуємо	мітинги (Zoom, Google meet, Skype, Slack etc), чати (чи в слеву клієнта, чи тіки мейли, чи інший воркспейс тощо), мейли		
Комунікативний план з	Комунікативний план з клієнтом (частота зустрічей, переписки і тд)		
+ [icon] *Project name* ▼			

Fig. 2. An example of an onboarding document for project managers

Description of processes makes it possible to clearly communicate what is expected in a particular case, to create a certain vector of future work performance. At the same time, the project description is an effective format for onboarding new project managers, who can immediately familiarize themselves with the company's work standards.

It is also necessary to develop a number of template solutions so that it is convenient for the team to use the available materials. In this way, management will be confident that only best practices and appropriate tools are being used. For example, the register of stakeholders is a document that contains information about all interested parties (stakeholders). This register is part of the overall project plan. It should be completed early in the planning process and updated as the plan evolves to reflect the project. There are several different tools and processes for managing stakeholders, such as a stakeholder analysis, a stakeholder influence matrix, and the stakeholder register itself. The register itself is the main planning tool and resource used throughout the project.

Another equally important document is the risk register, which is used as a risk management tool to identify potential project failures. This process aims to collectively

identify, analyze and address risks before they become problems.

A risk register document, also known as a risk register log, tracks potential project-specific risks. It also contains information on the priority of the risk and the probability of its occurrence.

A project risk register should not only identify and analyze risks, but also provide tangible mitigation measures. That way, if a risk becomes a bigger threat, the team is ready for solutions and empowered to solve problems.

The change registry or change log is a central place to store all information related to changes in a project. Almost all projects undergo changes at some point. When a change occurs, the project manager needs to record information related to the change to help track and control the impact of the change on the project. The change log helps you do this by providing a way to record all change information in a clear and structured format.

The stakeholder engagement assessment matrix is a model used by the project manager to assess the current level of stakeholder engagement in the project.

Stakeholders are proposed to be classified into the following groups:

- They do not know about the project. This group consists of stakeholders who are unaware of the project and any potential impact it may have on their operations.
- Stable. Stakeholders in this category are aware of the project, but do not accept the changes.
- Neutral. Representatives of this group are aware of the project, but do not oppose it or support it.
- Those who support. These stakeholders are aware of the project and its potential impact and support the change.
- Leading, leading. Stakeholders in this category are aware of the project and actively work on its success, securing the title of "champions of change".

In addition to identifying the current level of engagement, the matrix can also be used to discuss the desired level of engagement for each stakeholder or group of stakeholders.

The lessons learned register is a document in which the team records its valuable

project experience. It is an important result of the process of acquiring knowledge within the project. In addition to other input data, the experience register is also an output element in this process. Project team members should record all valuable information obtained during the project. After the completion of project activities, it is useful to archive the obtained data for use in future projects. This archive forms a repository of received data for use in future similar projects. Such a repository of knowledge should be easily accessible to everyone in the organization, at least to the community of project managers. An effective tool is the regular meetings of the PMO team to discuss the lessons learned of their projects, thus there is an opportunity to synchronize with respect to certain situations, to advise each other on appropriate approaches. This practice will bring the entire team together and encourage the sharing of knowledge and experience gained during the project.

Taking into account the differences and peculiarities of projects in the activities of business entities, as well as the difficulty of applying project management tools without proper adaptation to the specifics of local projects, there is a need to create a flexible project management system. Such a system will make it possible to perform tasks more efficiently and productively, taking into account all the differences and requirements of the modern economic environment, and to achieve the desired results. Project teams face the need to harmonize all local and global processes to ensure consistency, optimize resources and achieve project goals.

The considered tools for creating a project management office are designed to provide the company with effective improvement of the management process and, accordingly, to obtain better results within the framework of cooperation with the company's clients. For the organization, this should become a significant basis for further active development. The proposed tools for creating a PMO are adaptive to changes and unexpected situations, which today, more than ever before, have become expected blockers, so if necessary, the model can be modified and improved, applying those methods and tools that will be considered the most effective under certain conditions.