

# Case Study

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## Case Study: TechVantage Solutions - Stage 1 (Mindset)

### Your Role

You are a strategy delivery consultant. Alex Thompson, VP of Operations at TechVantage Solutions, has hired you to help Samantha rescue her struggling PMO. You have 90 days to work with Samantha to transform the PMO and demonstrate value to the executive team.

### Case Study

#### Part 1: The Emergency Call

##### Day 1, Monday, 8:00 AM - Conference Call with Alex Thompson

"Thanks for taking this on," Alex says, sounding tired. "I'll be honest—we're in trouble. Six months ago, I convinced the executive team to create a PMO. I hired Samantha to lead it. She came highly recommended—PMP certified, seven years of project management experience, great energy. She absolutely hit the ground running."

He pauses. "But now... the CTO is threatening to dissolve the PMO and move all project delivery under IT. The CEO is losing patience. Samantha is working seventy-hour weeks and genuinely can't understand why no one appreciates everything she's built."

"What has she built?" you ask.

"Templates. Processes. Dashboards. Training programs. A complete methodology. She's incredibly thorough. But..." He trails off, then continues. "Projects are still slow. We're missing market opportunities. The executive team is asking what value the PMO is actually providing."

"What did you tell Samantha when you hired her?"

"I said 'project management is broken here and projects take too long.' And I meant it—we had no consistency, no structure, projects were chaos. She's definitely fixed that. But now we have different problems."

"Like what?"

"Well, Sarah—our Chief Strategy Officer—told me last week that the PMO intake process killed a strategic opportunity. By the time the project got through Samantha's approval workflow, the market window closed. And David, our CTO, says his team spends more time filling out PMO templates than writing code."

He sighs. "Look, I don't want to poison the well before you meet her. Samantha is smart and hardworking. She's not the problem—or at least not the whole problem. I think she's just focused on the wrong things, and she doesn't know it yet."

"What's the timeline?"

"You have ninety days to help her turn this around. The exec team will do a formal PMO review at the end of that period. If we can't show significant improvement, they'll shut it down. Can you meet with her this morning?"

## Part 2: Meeting Samantha

### Day 1, Monday, 10:00 AM - Samantha's Office

Samantha's office tells a story. Three monitors display project dashboards, Gantt charts, and status reports. Her whiteboard is covered in process flows. Stacks of binders lined the shelves, labeled "PMO Methodology," "Project Templates," "Training Materials," and "Compliance Checklists."

She looks up from her screen, eyes tired but brightened when she sees you. "You're the consultant Alex mentioned? Thank God. I need someone who actually understands what I'm trying to do here."

She gestures around the room. "I've built this entire PMO from scratch in six months. Everything was chaos when I got here—no standards, no process, projects failing left and right. Look at what I've created."

She pulls out a thick binder. "This is our Project Management Methodology Guide. Forty-seven pages. It covers the complete project lifecycle—initiation, planning, execution, monitoring and controlling, closing. I based it on PMBOK best practices and blended in some Agile principles."

"Walk me through what you've built," you say.

Samantha lights up. She's clearly proud of her work.

#### ***The Intake and Approval Process***

"First, I created a proper intake process. Before, people would just start projects with an email or a hallway conversation. Now we have structure."

She pulls up a digital form on her screen. "This is our Project Intake Form. Forty-two questions covering everything we need to know—project description, business justification, estimated budget, timeline, resources needed, risks, dependencies, stakeholder list, success criteria. It's comprehensive."

"How long does it take to complete?"

"Most people say two to three hours. Some complain it's too detailed, but I explain that this is how we ensure we have complete information before starting work. Garbage in, garbage out, right?"

She clicks to another screen. "Once the intake is submitted, it goes through our approval workflow. Twelve steps—departmental manager, functional director, budget review, resource review, technical review, strategic alignment check, portfolio prioritization committee, final executive approval. The whole process usually takes about three weeks."

"Three weeks to approve a project?"

"Sometimes four if people don't respond quickly. But this ensures everyone's aligned and we're not starting projects that shouldn't be done." She sounds defensive but continues.

"After approval, we kick off with a project charter. Eight pages, very thorough—project purpose, objectives, scope, deliverables, assumptions, constraints, stakeholders, success criteria, budget, timeline, governance structure. The charter gets signed by all key stakeholders before we proceed."

### ***Templates and Methodology***

Samantha pulls open a file drawer filled with binders. "I've created templates for everything a project needs."

She lists them on her fingers:

- "Work Breakdown Structure template
- Resource allocation template
- Risk register—I actually just updated this one because the first version wasn't comprehensive enough
- RAID log for tracking risks, assumptions, issues, and dependencies
- Change request form—three pages, requires impact analysis and three levels of approval
- Weekly status report template
- Monthly executive summary template
- Lessons learned template
- Project closure checklist—twenty-seven items"

"That's a lot of documentation," you observe.

"Good project management requires good documentation. I learned that the hard way early in my career. You can't manage what you don't measure and document."

She opens her laptop to a dashboard. "Speaking of measuring—look at what I've built. This dashboard tracks all active projects across multiple dimensions."

The screen shows colorful charts and graphs:

- Percentage of projects with completed charters: 87%
- Weekly status report submission rate: 92%
- Template compliance rate: 78%
- On-time delivery percentage: 85%
- On-budget delivery percentage: 83%

"These numbers are solid," Samantha says proudly. "We're creating consistency and predictability. That's exactly what executives want, right?"

### ***The Compliance Framework***

"I also implemented a PMO compliance framework," she continues. "Every month, I audit all active projects against sixty-seven checkpoint criteria. Did they follow the methodology? Are

they using approved templates? Are they submitting required reports? Are risks being tracked properly?"

"What happens if a project isn't compliant?"

"I send the project manager a compliance report with specific deficiencies. They have one week to remediate. If they don't, it escalates to their manager and goes on their performance review."

She pulls up a spreadsheet. "We've seen compliance improve from forty-two percent when I started to seventy-eight percent now. The methodology is working—people just need to follow it."

### ***Training and Change Management***

"Of course, I knew people would need training on all this. So I developed a comprehensive training program."

She shows you her training materials:

- "Eight half-day sessions on 'How to Use PMO Templates and Processes'
- Video tutorials on completing the intake form
- A 125-page PMO Process Guide
- Quick reference cards for each template
- Monthly 'PMO Office Hours' where people can ask questions"

"How was the training received?"

Samantha's enthusiasm dims slightly. "Mixed. Attendance was mandatory, but some people were... resistant. They said it was too much process, too bureaucratic. But change is hard. They'll see the value once they get used to it."

### ***Current Project Portfolio***

You ask about the active projects. Samantha pulls up her portfolio dashboard.

"We have eighteen active projects right now." She scrolls through the list:

- Cloud migration initiative
- New customer portal (just completed)
- Mobile app redesign
- CRM implementation
- Marketing automation platform
- Internal HR system upgrade
- Financial reporting system enhancement
- Security compliance updates (3 projects)

- Product feature enhancements (6 projects)
- Legacy system decommissioning

"That's a lot of projects," you note.

"They're all important. The executives approved every one of them. And they're all marked Priority 1 in the system."

"All of them are Priority 1?"

"Yes. The executive team said they're all critical to the company's success. My job is to make sure they all get delivered on time and on budget."

"How many project managers do you have?"

"Fifteen. Most are managing three to four projects simultaneously. I allocate them at twenty-five to forty percent per project based on estimated workload."

You do quick math in your head—fifteen project managers fractionally allocated across eighteen projects.

### ***The Success Story***

"Let me show you our success," Samantha says, pulling up a project file. "The customer portal project. This is exactly how the PMO is supposed to work."

She walks through the timeline:

- "Intake submitted in January
- Approved in February
- Project charter signed in March
- Six-month delivery timeline
- Delivered in August—exactly on time
- Came in at \$450K—exactly on budget
- Met all requirements in the original charter"

"By every project management metric, this was a success," she says firmly. "On time, on budget, all deliverables completed."

"How's it working for the business?"

Samantha's face clouds. "That's where things get... complicated. In June, the product team wanted to add a self-service payment feature. I said no—we were halfway through the project, scope was locked, and adding new features would blow the timeline. They escalated to Jennifer, the VP of Product Development, but I held firm. We had a plan and needed to stick to it."

"Then in July, the sales team wanted advanced reporting analytics. Same situation. I explained we couldn't keep changing scope mid-project or we'd never finish anything. I approved the project to deliver what was in the charter, and that's what we delivered."

"And after launch?"

She shifts uncomfortably. "I started hearing complaints. Customers were still calling in to make payments instead of using the portal. The sales team said they were still manually generating reports. Our customer satisfaction scores dropped fifteen percent after the portal launch."

Her voice gets defensive. "But that's not a project management failure. We delivered what was in the charter. If the charter didn't include the right features, that's not my fault. People should have been more thorough in the requirements gathering phase."

### ***The Current Situation***

You ask her about the feedback she's been getting lately.

Samantha's shoulders slump. "People are complaining. A lot. They say I'm slowing things down, adding bureaucracy, making it harder to get work done. The CTO called me a 'bureaucracy generator' in an executive meeting."

Her voice cracks slightly. "I'm working sixteen-hour days. I created all these resources to help people deliver projects better. And they act like I'm the enemy. I don't understand what I'm doing wrong."

She opens her metrics dashboard again. "Look at these numbers. Eighty-seven percent charter completion. Ninety-two percent status report submission. Seventy-eight percent compliance. Eighty-five percent on-time delivery. These are good numbers!"

"What did the executives say when you showed them this?"

"The CEO barely looked at it. He said, 'That's nice, Samantha, but we just lost three major deals because we're too slow to market. What good is on-time delivery if we're not delivering what matters?'"

She looks genuinely confused. "But we ARE delivering. We're delivering projects on time and on budget. Isn't that what executives want?"

### ***The Real Question***

"Samantha," you ask gently, "can you tell me what business outcomes TechVantage is trying to achieve? What's the company's strategy?"

She blinks. "Um... grow revenue, I think? Alex might have mentioned something about a growth target. And Michael—he's the CEO—talked about new products and market expansion when I interviewed."

"Do you know the specific revenue target?"

"Not off the top of my head. But that's high-level strategy stuff. My job is to make sure projects get executed efficiently, right? The executives set strategy, I make sure it gets delivered through good project management."

"Do you know which of these eighteen projects are most critical to achieving that strategy?"

"Well... they're all Priority 1, so they're all critical."

"Do you measure whether projects achieve business value after they're delivered?"

She looks confused. "That's not really a PMO responsibility, is it? We deliver the project, then operations takes over. If something isn't being used the way people wanted, that's a change management or training issue, not a project delivery issue."

She pulls out her methodology binder, almost defensively. "This is all best practice. This is what every PMO book and training course says to do. I'm following the industry standards. So why isn't it working?"

### Part 3: A Quick Tour

Before you leave, Samantha walks you through her PMO "war room."

#### ***On the walls:***

- Large Gantt chart showing all 18 projects
- Dashboard printouts showing her metrics
- Process flow diagrams for intake, approval, change management, and closure
- "PMO Vision" poster: "Delivering Projects with Excellence, Consistency, and Accountability"

#### ***On her desk:***

- Three binders: Current templates, Updated templates (pending rollout), Next quarter's compliance audit plan
- Printout of her calendar—back-to-back meetings: PMO reviews, project status meetings, compliance audits, training sessions, template update workshops

#### ***On her whiteboard:***

- List titled "Next Process Improvements"
  - Enhanced risk scoring methodology
  - New dependency tracking template
  - Revised project closure checklist (expand to 40 items)
  - Portfolio-level dashboard (in addition to project-level)
  - Quarterly PMO maturity assessment

"I have so many ideas for how to improve the PMO," Samantha says. "If people would just give the current processes a chance to work, I could start implementing these enhancements."

As you're leaving, she says quietly, "I really need your help. I know I'm doing good work. I just need to help everyone else see it."

## What You Know So Far

### ***Company Context***

- **Company:** TechVantage Solutions
- **Size:** 450 employees
- **Industry:** Software Technology & Cloud Services

- **Current Revenue:** \$85M annually
- **Growth Goal:** Mentioned but Samantha doesn't know specifics
- **Time in Business:** Established, but facing competitive pressure

### **PMO Status**

- **Age:** 6 months old
- **Leader:** Samantha (PMP, 7 years PM experience)
- **Team:** 15 project managers
- **Active Projects:** 18 (all marked "Priority 1")
- **Time to Crisis:** You have 90 days to help turn it around

### **What Samantha Has Built (Summary)**

You'll need to extract the complete list from the conversations above, but you know she's created:

- Intake and approval processes
- Templates and methodology
- Compliance framework
- Training programs
- Dashboards and metrics
- Regular review meetings

### **Initial Red Flags You've Noticed**

- Focus on process compliance vs. business outcomes
- All 18 projects marked "Priority 1"
- Fractional allocation of PMs across multiple projects
- Metrics tracking project activities, not business value
- 3-week intake/approval process
- Samantha doesn't know the company's strategic goals
- "Successful" customer portal project that failed in the market
- Resistance from stakeholders
- No measurement of business outcomes after project completion