

Case Study

Case Study: TechVantage Solutions - Stage 2 (Assess)

Context: Week 2 of Your Engagement

After your initial meeting with Samantha, you spent Week 1 reviewing her documentation, observing her PMO review meetings, and analyzing the project portfolio. Now it's time to hear from the stakeholders.

You've scheduled interviews with key stakeholders across the organization. Samantha knows you're doing these interviews and is nervous but supportive. "I want to know what people really think," she told you. "Even if it's hard to hear."

Alex has instructed everyone to be candid with you. "The consultant is here to help, not judge. Be honest about what's working and what's not."

Case Study

Org Chart

TechVantage Solutions – Organizational Structure

Before beginning your stakeholder interviews, it helps to understand how TechVantage is organized:

Executive Leadership:

- **Jack Sullivan (CEO)**
- **Sarah Martinez (Chief Strategy Officer)** – 2 directors, 8 staff
- **David Park (Chief Technology Officer)** – 4 engineering managers, 45 developers, 8 QA
- **Priya Sharma (VP of Product Development)** – 3 product managers, 6 designers
- **Alex Thompson (VP of Operations)** – Includes PMO, IT Operations, Facilities
- **Samantha Reed (PMO Director)** – 4 senior PMs, 11 project managers
- **Mike Chen (IT Operations Director)** – 12 staff
- **Jennifer Marcus (VP of Sales)** – 3 regional sales directors, 8 account executives, 6 sales operations & enablement staff
- CFO (Not featured in this case)

Total Company Size: ~150 employees

PMO Reporting Notes:

- PMO Director (Samantha) reports to VP Operations (Alex)
- Project managers work across all departments but report to Samantha
- This creates matrix structure: PMs report to Samantha but serve stakeholders in Strategy, Product, Technology

Important Context: The PMO does not have authority over the projects—only over project management methodology and standards. This will be important when you consider how to influence change.

Full Interviews**Interview I: Jack Sullivan, Chief Executive Officer****Day 6, Monday, 9:00 AM - Executive Conference Room**

Jack is already seated when you arrive, flipping through a printed slide deck with handwritten notes in the margins. He doesn't look up immediately.

"Close the door," he says. "I've got fifteen minutes before my next call."

You sit.

"I'm going to be blunt," he continues. "I approved the PMO because I needed results. Faster delivery. Fewer surprises. Better outcomes. That's not what I'm getting."

"What are you getting?" you ask.

He exhales. "A lot of activity. A lot of reports. A lot of meetings. And yet—somehow—we're still missing the market windows that actually matter."

He taps the deck. "Take the EMEA product launches. We missed last year's buying season. Again. The status reports told me everything was 'on track' until it suddenly wasn't."

"What changed?"

"That's the problem," Jack says. "I don't know. Nobody could tell me when it still mattered. I found out after the fact."

He leans back. "I don't need perfect plans. I need early signals. I need to know when something is drifting before it's unrecoverable."

He pauses, choosing his words. "Samantha is smart. She works hard. She means well. But I feel like I'm being managed *at* instead of partnered *with*."

"What does that look like for you?"

"I get dashboards. Green, yellow, red. But none of them answer the only question I care about: 'Are we going to achieve the outcomes we committed to?'"

He flips to another page. "And don't get me started on prioritization. Every initiative is 'critical.' Every leader says their work can't wait."

“So how do you decide?”

Jack gives a short laugh. “I don’t. We just... try to do everything. And then we wonder why nothing finishes cleanly.”

He looks directly at you now. “Here’s what worries me most. We’re investing real money—people, capital, executive time—and I can’t confidently tell the board what return we’re getting.”

“What would you want instead?”

“I want someone who helps us make trade-offs. Someone who challenges us when we’re spreading ourselves too thin. Someone who connects delivery to strategy, not just schedules.”

He glances at the clock. “I’m not interested in dismantling the PMO for the sake of it. But if it can’t help us deliver what we say matters most, then we need to rethink how it’s operating.”

Interview 2: Sarah Martinez, Chief Strategy Officer

Day 7, Tuesday, 11:00 AM - Strategy Office

Sarah’s office walls are covered in strategy maps and market analyses. She gestures for you to sit while she finishes typing an email.

“Sorry,” she says. “I’m mediating another priority dispute.”

You smile. “That seems relevant.”

She nods. “Very.”

She folds her hands. “At a high level, I believe in what Samantha is trying to do. We needed more structure. We needed better visibility. That part is true.”

“What’s not working?”

“The translation,” Sarah says without hesitation. “Strategy and delivery are speaking different languages.”

“Can you give me an example?”

“Customer Portal,” she says. “Strategically, it’s about adoption and retention. Operationally, it’s about features and milestones. What I get reported on are feature completion percentages.”

“And adoption?”

She shakes her head. “That’s discussed later. After launch. When it’s too late to change course.”

She leans forward. “We talk endlessly about execution health, but very little about whether the work is actually moving the strategic needle.”

“What happens when you raise that?”

“I’m told it’s ‘out of scope’ for the project,” she says. “Or that benefits realization happens after delivery.”

She pauses. “But strategy doesn’t work that way. Outcomes aren’t an afterthought. They’re the point.”

You ask about prioritization.

Sarah sighs. “This is where it breaks down. Everything comes in as urgent. The PMO captures it all. Schedules it all. Allocates people to all of it.”

“But strategy requires saying no,” she continues. “Or at least ‘not now.’ I don’t see that happening.”

“What role do you think the PMO should play?”

“I want them to be a forcing function,” Sarah says. “To help us see the consequences of our choices. To show us what happens if we fund Project A instead of Project B.”

She hesitates. “Right now, I think they’re trying to be neutral. But neutrality in prioritization is still a decision.”

She offers a small smile. “I want Samantha to succeed. I really do. But the PMO has to evolve beyond coordination and into strategic enablement—or it will always feel disconnected from the work I’m accountable for.”

Interview 3: David Park, Chief Technology Officer

Day 8, Tuesday, 2:00 PM – David’s Office

David’s office is quiet but tense. A standing desk, dual monitors filled with code, and a whiteboard crowded with architecture diagrams dominate the room. He’s mid-typing when you arrive.

“Give me a minute,” he says without looking up.

You wait. He finishes, closes his laptop halfway, and finally turns to you.

“Okay. Let’s talk,” he says. “I assume you know I’m not exactly thrilled with how things are going.”

“I’ve heard there’s frustration,” you reply. “I want to understand it from your perspective.”

He nods once. “Good. Because from where I sit, engineering is constantly reacting instead of building.”

“What do you mean by reacting?”

“Priorities change faster than teams can adapt,” he says immediately. “We commit to a plan, start executing, and then—boom—something new comes in. Another escalation. Another ‘urgent’ request.”

He gestures toward his screen. “My engineering managers spend more time reshuffling work than actually delivering it.”

You ask how that shows up day to day.

“Context switching,” he says. “Everywhere. Developers assigned to three, sometimes four initiatives at once. QA pulled in late because decisions change upstream. And then when delivery slips, engineering gets blamed.”

“Blamed by whom?”

"Leadership. Other functions. Sometimes the PMO indirectly," he says carefully. "Even when the root of the issue isn't technical."

He leans back. "Late decisions disrupt plans that are already in motion. That's the killer."

"Can you give me an example?"

"We had a release plan locked," he explains. "Teams were executing. Then a new dependency surfaced because another initiative moved ahead without us knowing. Suddenly, we're reworking timelines, reassigning people, explaining delays."

"And how is that handled?"

"Escalations bypass normal channels," he says. "I find out after commitments have already shifted."

You ask what that does to his teams.

"They stop trusting the plan," he says. "And when teams don't trust the plan, they hedge. They don't commit fully. They wait for the next change."

He pauses. "That's not how you build stable systems."

"What would stability look like for you?"

"Clear priorities up front," he says. "If something is truly critical, fine. Protect it. Staff it properly. But don't tell me everything is critical and then ask why nothing finishes."

You ask how he experiences the PMO specifically.

He exhales slowly. "Look—I don't think Samantha's intentions are bad. She's trying to bring order. But from my side, the process doesn't absorb reality very well."

"In what way?"

"Delivery dates move without anyone understanding the downstream impact," he says. "Engineering isn't a black box. Changes ripple. But we're often asked to just 'make it work.'"

"And can you?"

"Sometimes," he says. "But at a cost."

"What kind of cost?"

"Technical debt. Burnout. Reduced quality. Slower future delivery," he says plainly. "Those things don't show up right away, but they compound."

You ask what he wants to see change.

"I want fewer surprises," he says. "Better coordination across teams. And decisions made early—before work is underway, not after."

He looks at you directly now. "Engineering doesn't need less structure. We need the right structure. One that protects focus instead of fragmenting it."

You stand to leave.

"One last thing," he adds. "If this doesn't change, people will keep solving problems locally. Workarounds. Shadow decisions. That's already starting."

He shrugs. "That's what happens when the system doesn't help you do the right thing."

Interview 4: Alex Thompson, Vice President of Operations

Day 9, Thursday, 3:30 PM - Operations Floor Conference Room

Alex arrives carrying a coffee and a stack of printed reports.

"I hope you're ready," he says. "I've got feelings."

You laugh. "That's why I'm here."

He sits. "Look, I support the PMO. I fought to keep it out of IT. I still think that was the right call."

"What's frustrating you?"

"The tension," Alex says immediately. "Between control and flow."

He flips through the reports. "From an operations standpoint, I appreciate the consistency. The templates. The cadence. It's cleaner than what we had before."

"But?"

"But it's heavy," he admits. "Some teams feel like they're working for the PMO instead of the business."

He points to a utilization report. "Take this. Everyone looks 'efficient' on paper. Ninety-five percent utilized."

"And in reality?"

"Burned out. Context-switching constantly. Nobody feels like they're actually finishing anything."

You ask about decision-making.

"That's another issue," Alex says. "Escalations take too long. By the time something reaches the steering committee, it's already painful."

"Why?"

"Because the forums are structured around reporting, not resolving," he says. "We spend more time reviewing status than making decisions."

He rubs his temples. "And when decisions do get made, they're often compromises. We try to keep everyone happy."

"Does that work?"

Alex snorts. "No. It just keeps everyone equally dissatisfied."

He softens. "Samantha is trying to professionalize delivery. I respect that. But I think she's carrying the weight alone."

"What do you mean?"

"She's enforcing process because there's no shared agreement on priorities," he says. "So process becomes the proxy for alignment."

He looks at you. "If we don't fix how we engage leaders in ownership and decision-making, no amount of process refinement is going to help."

He stands. "I want the PMO to work. But it needs to help us move—not just manage."

Interview 5: Priya Sharma, Vice President of Product Development

Day 10, Friday, 1:00 PM - Product Design Studio

Priya greets you with a warm smile and gestures toward a table scattered with wireframes and sticky notes.

"Sorry for the mess," she says. "We're mid-sprint."

You tell her it looks productive.

"It is," she agrees. "At least inside the product team."

You ask her how she experiences the PMO.

Her smile tightens slightly. "Mixed."

"Tell me more."

"I love the idea of predictability," Priya says. "And I appreciate that Samantha is trying to create consistency across teams. But product work doesn't behave the way the templates expect it to."

"How so?"

"We're learning as we go," she explains. "Customer feedback changes things. Market signals change things. But every time we adjust, it feels like we're being penalized for it."

"In what way?"

She pulls up a project tracker. "We're asked to justify scope changes as if they're failures instead of learning."

She scrolls. "This feature was deprioritized after customer testing showed it wouldn't move adoption. That was a good decision. But the status report flags it as scope variance."

"And how does that land with leadership?"

"They see red," Priya says simply. "They don't see learning. They see deviation."

She leans back. "So we start gaming the system. We delay formal changes. We keep work unofficial until it's 'safe.'"

"That sounds risky."

"It is," she admits. "But the alternative is death by paperwork."

You ask about outcomes.

"That's the part that frustrates me most," Priya says. "We talk constantly about delivery dates. Rarely about whether customers are actually using what we build."

She gestures to a screen showing user metrics. “This tells me more in five minutes than a month of PMO reports.”

“Does that data show up in PMO conversations?”

“Not really,” she says. “It’s considered ‘post-delivery.’”

She pauses. “Product success isn’t binary. It’s not ‘done’ or ‘not done.’ But the system treats it that way.”

“What do you want instead?”

“I want delivery to protect learning,” Priya says. “To help us pivot faster, not slower. And to tell a story that connects delivery to customer impact.”

She sighs. “Right now, it feels like we’re trying to fit discovery work into an execution mold.”

Interview 6: Mike Chen, IT Operations Director

Day 11, Monday, 10:30 AM - IT Operations War Room

Mike is standing when you arrive, pointing at a wall of system uptime charts.

“Five nines,” he says proudly. “That’s my world.”

You nod. “How does the PMO fit into that world?”

He chuckles. “Carefully.”

He sits. “From an ops perspective, I appreciate order. I appreciate standards. I appreciate knowing who’s responsible for what.”

“So the PMO helps?”

“In theory,” Mike says. “In practice, it’s... complicated.”

“How?”

“Our work is continuous,” he explains. “Infrastructure upgrades, security patches, incident response. But we’re being asked to treat it like discrete projects.”

He pulls up a change log. “This firewall upgrade was logged as a project. It required a charter, a schedule baseline, weekly status reporting.”

“And?”

“It took longer to document than to implement,” he says flatly.

You ask about prioritization.

“That’s another issue,” Mike says. “Everything coming from the PMO feels equally urgent. Strategic initiatives, regulatory work, maintenance—all in the same queue.”

He shakes his head. “Ops doesn’t work that way. Some things can wait. Some absolutely cannot.”

“What happens when conflicts arise?”

“We escalate,” he says. “And then we wait.”

“How long?”

He smiles without humor. "Long enough that we start finding workarounds."

You ask about value.

"I'm measured on stability," Mike says. "Downtime. Incident response. Risk mitigation. None of that shows up clearly in the PMO metrics."

"So how do you report success?"

"We don't," he says. "At least not in a way that resonates outside IT."

He pauses. "I don't think the PMO sees ops work as value-driving. More like background noise."

"What would help?"

"Differentiation," Mike says. "Not all work is the same. Not all value is delivered the same way. Treating everything uniformly creates friction."

He adds quietly, "And friction in operations becomes risk."

Interview 7: Samantha Reed, PMO Director

Day 12, Tuesday, 4:00 PM - PMO Office

Samantha's office is immaculate. Whiteboard neatly divided into swim lanes. Color-coded schedules pinned to the wall.

She looks tired—but determined.

"Thanks for meeting," she says. "I assume you've heard... everything."

"I've heard perspectives," you reply. "I want yours."

She exhales slowly. "I'm trying to professionalize delivery."

"What does that mean to you?"

"Consistency. Transparency. Discipline," she says. "Before the PMO, projects were chaos. No standards. No accountability."

"And now?"

"Now at least we know what's happening," she says. "We have visibility."

You ask how she defines success.

She hesitates. "Predictable delivery. Fewer surprises. Projects that follow a plan."

"What about outcomes?"

"That's important too," she says quickly. "But it's harder to control."

She gestures to a dashboard. "I can control process adherence. I can't control whether the business uses what we deliver."

"Does that concern you?"

"It does," Samantha admits. "But if we don't get execution under control first, none of that matters."

You ask about stakeholder frustration.

She nods. "I know they think we're heavy. Bureaucratic. But governance exists for a reason."

"Which is?"

"To prevent failure," she says. "To protect the organization."

She pauses. "I inherited a culture where project managers were blamed for everything. I wanted to give them cover. A system. Something objective."

"And has that worked?"

"Sometimes," she says. "But now it feels like everyone wants something different."

She rubs her temples. "They want speed. Flexibility. Focus. But they still want certainty."

You ask about prioritization.

"That's above my pay grade," Samantha says carefully. "I take in what's approved and help deliver it."

"And if everything is approved?"

She gives a small, resigned smile. "Then everything gets managed."

She looks up. "I'm open to changing how we operate. But I need clarity. What does leadership actually want from this PMO?"

Interview 8: Jennifer Marcus, VP of Sales

Day 14, Wednesday, 3:30 PM - Jennifer's Office

Jennifer closes the door behind you.

"I'll get straight to the point," she says. "We're overpromising and underdelivering—and it's costing us credibility."

"With customers?"

"With customers. With partners. Internally." She shakes her head. "My team commits based on what they're told is possible. And then delivery slips. Or scope changes. Or priorities shift."

"Where does that break down?"

"I don't know," she admits. "That's part of the problem. I hear one thing from leadership. Another from delivery. And something else entirely from the PMO."

She crosses her arms. "What I do know is this: when deals depend on delivery timelines, uncertainty kills momentum."

"How does the PMO show up for you?"

She shrugs. "They ask for forecasts. They want to know which deals are dependent on which projects. Fair enough."

"But?"

"But then nothing changes. The same projects stay 'in progress.' The same delays get explained. And my team is left managing expectations with customers."

She leans forward. "I don't need perfect plans. I need honesty. I need to know what's really achievable so I can sell responsibly."

"What would help?"

"Clear priorities," she says. "If something is truly strategic, great—let's protect it. But don't tell me everything is critical and then ask me why customers are unhappy."

She pauses. "Sales feels like the last to know when things go wrong. And the first to feel the impact."

Interview Snapshot

Jack Sullivan – CEO

What he cares about (WIIFM):

- Growth that shows up in financial results
- Confidence that strategy turns into execution
- Credibility with the board and investors

What he says:

- “We’ve invested heavily – I expect to see returns.”
- “I don’t want surprises late in the game.”
- “Why does it take so long for good ideas to pay off?”

What he says he wants:

- Faster realization of strategic priorities
- Fewer initiatives drifting without clear impact
- Leaders taking ownership of outcomes

What frustrates him (details):

- Strategic initiatives feel disconnected from results
- He gets status updates but not clarity on progress toward goals
- Issues surface late, when options are limited
- Too many initiatives compete for attention at once

Sarah Martinez – Chief Strategy Officer

(2 directors, 8 staff)

What she cares about (WIIFM):

- Strategy execution that stays true to intent
- Focus on the few priorities that matter most
- Measurable progress toward strategic objectives

What she says:

- “Everything looks important once it becomes a project.”
- “We lose focus once execution starts.”

- “I spend too much time defending priorities.”

What she says she wants:

- Clear prioritization tied to strategy
- Visibility into which initiatives truly matter
- Fewer side initiatives pulling energy away

What frustrates her (details):

- Strategic priorities compete with operational noise
- Projects start without clear alignment to goals
- Teams interpret strategy differently
- Hard to say no once work is underway

David Park – Chief Technology Officer

(4 engineering managers, 45 developers, 8 QA)

What he cares about (WIIFM):

- Stable delivery environment for his teams
- Technical quality and sustainable pace
- Protecting his teams from constant churn

What he says:

- “We’re always reacting.”
- “Priorities change faster than teams can adapt.”
- “Engineering gets blamed for things outside our control.”

What he says he wants:

- Fewer last-minute changes
- Clearer expectations up front
- Better coordination across teams

What frustrates him (details):

- Engineers pulled in multiple directions
- Late decisions disrupt plans already in motion
- Escalations bypass normal channels
- Delivery dates shift without understanding downstream impact

Priya Sharma – VP of Product Development

(3 product managers, 6 designers)

What she cares about (WIIFM):

- Customer adoption and product success
- Product decisions driven by user needs
- Predictable release cycles

What she says:

- “We design for customers, then we pivot late.”
- “Product tradeoffs aren’t always respected.”
- “We’re reacting instead of planning.”

What she says she wants:

- Earlier involvement in key decisions
- Clear ownership of product direction
- Alignment between strategy and roadmap

What frustrates her (details):

- Requirements change after development starts
- Customer feedback arrives too late to influence outcomes
- Product teams absorb impact of decisions made elsewhere
- Hard to balance speed with quality expectations

Alex Thompson – VP of Operations

(Oversees PMO, IT Operations, Facilities)

What he cares about (WIIFM):

- Smooth operations with minimal disruption
- Predictable demand on shared services
- Keeping teams productive, not overwhelmed

What he says:

- “We’re supporting too many things at once.”

- “Everything feels urgent.”
- “Operations absorbs the fallout.”

What he says he wants:

- Better coordination across initiatives
- Realistic planning assumptions
- Fewer fire drills

What frustrates him (details):

- Competing priorities hit operations simultaneously
- Projects assume capacity that doesn’t exist
- Dependencies surface late
- Operations feels reactive instead of planned

Samantha Reed – PMO Director

(4 senior PMs, 11 project managers)

What she cares about (WIIFM):

- Credibility for the PMO
- Supporting delivery success
- Protecting her team from blame culture

What she says:

- “We’re doing what we’re asked, but it’s never enough.”
- “We’re seen as the problem when things go wrong.”
- “We’re busy, but not always effective.”

What she says she wants:

- Clear expectations of the PMO’s role
- Earlier involvement in decisions
- Recognition as a partner, not a compliance function

What frustrates her (details):

- PMO measured on activity, not impact
- Project managers put on the defensive in steering meetings
- Escalations happen without context

- Success defined narrowly as on-time/on-budget

Mike Chen – IT Operations Director

(12 staff)

What he cares about (WIIFM):

- System stability
- Predictable workloads
- Avoiding burnout on his team

What he says:

- “Projects assume we’re always available.”
- “Ops work is invisible until something breaks.”

What he says he wants:

- Better visibility into upcoming demand
- Respect for operational constraints
- Earlier coordination

What frustrates him (details):

- Projects disrupt day-to-day operations
- Operational impacts not considered during planning
- Emergency requests derail planned work
- Limited voice in prioritization decisions

Jennifer Marcus – VP of Sales (*not interviewed*)

What she cares about (WIIFM):

- Meeting customer commitments
- Revenue predictability
- Sales credibility

What she’s described as saying:

- “We commit, then have to explain delays.”
- “Customers don’t care about internal issues.”

What frustrates her (details):

- Delivery dates shift after commitments are made
- Limited visibility into execution risks
- Sales caught between customers and delivery teams