

PMO Setup and Portfolio Governance

Establishing a shared intake, reporting, and governance process for 14 projects using existing staff and tools.

Client Larkfield Distribution Co.	Practice Program & Project Delivery	Duration 16 weeks	Executive sponsor Chief Operating Officer
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BACKGROUND

Larkfield Distribution Co. is a Mid-Atlantic third-party logistics provider with four distribution centers and roughly 520 employees. Its change agenda includes a warehouse management system replacement, a new transportation management system, a fifth distribution center, a customer portal, and 10 smaller projects.

The 14 projects do not yet share an intake, status, or governance process. Two are running a quarter behind plan, and material risks often reach leadership later than they should. Smartsheet is licensed but not yet used consistently. Larkfield Distribution Co. engaged HGMA to establish a project management office (PMO) using existing tools, with responsibility transferred to an internal coordinator after the engagement.

OBJECTIVES

1. Establish one accurate view of every active project, its owner, status, and material risks within eight weeks.
2. Introduce intake and prioritization so new work starts with a sponsor, a business case, and a capacity check.
3. Run a consistent weekly reporting cycle and a monthly leadership governance review, with decisions and actions tracked through closure.
4. Provide project leads with the guidance and tools to maintain schedules, report status, and track actions.

In scope

- All operational and technology projects of \$25,000 or more, or more than 200 staff hours
- Intake, setup, status reporting, milestone tracking, governance, and closure processes
- Configuration of the existing Smartsheet workspace for portfolio use
- Process guidance, templates, and training for project leads and leadership

Out of scope

- Delivery of any individual project, including the warehouse system implementation
- Vendor selection or contract negotiation
- New software purchases or permanent PMO hiring decisions
- Financial accounting for capital projects

APPROACH AND TIMELINE

WEEKS 1-3 Discover Interviews, project inventory, document and status review, current-state findings.	WEEKS 4-6 Design PMO operating model, intake tiers, reporting standards, governance calendar, roadmap.	WEEKS 7-12 Implement Portfolio workspace live, weekly reporting cycle running, first governance reviews, lead training.	WEEKS 13-16 Sustain Coaching, refinement, and transition to the internal PMO coordinator.
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DELIVERABLES

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D1	Current-state findings memo	Week 3
D2	PMO operating model and implementation roadmap	Week 5
D3	Portfolio register, intake form, and status templates in Smartsheet	Week 8
D4	Weekly portfolio status report and monthly governance review materials	Week 8, then recurring
D5	Process guidance and training for project leads and leadership	Week 10
D6	Transition plan and 90-day sustainment checklist	Week 16

GOVERNANCE AND ROLES

ROLE	RESPONSIBILITY
Executive sponsor (COO)	Owns outcomes, chairs the monthly governance review, resolves escalations
Steering group	COO, CFO, VP Information Technology, VP Operations; approves priorities and major decisions
HGMA principal consultant	Leads design and setup, runs the weekly reporting cycle during the engagement, and coaches project leads
PMO coordinator and project leads	Coordinator shadows from week 7 and owns the weekly reporting cycle from week 13; project leads submit weekly status and raise risks

SUCCESS MEASURES

MEASURE	TARGET BY WEEK 12
Active projects recorded in the portfolio register with owner and status	100%
Weekly status submissions received on time	90% or higher
Open decisions logged with an owner and due date	100%
Median days from risk raised to leadership visibility	7 days or fewer

ASSUMPTIONS AND RISKS

- Project leads can commit about one hour per week to status and governance activities.
- An internal PMO coordinator must be named by week 6. A delay would affect the handover schedule and continuity of reporting.
- The warehouse cutover may compete for the same people in weeks 9 to 12, so the status template is kept short.