

Portfolio Governance: Current-State Findings

Inconsistent reporting and decision processes are contributing to project delays.

To Chief Operating Officer and steering group	From HGMA Consulting Group	Deliverable D1, current-state findings	Status Final
--	-------------------------------	---	-----------------

SUMMARY

Larkfield Distribution Co. is running 14 projects without a common intake, reporting, or decision process. Risk information is held within individual teams and can take weeks to reach leadership. An internal PMO coordinator, a shared portfolio register, and a weekly reporting cycle would address the reporting and accountability gaps identified in this assessment.

ASSESSMENT APPROACH

Over three weeks we interviewed 18 people across operations, IT, finance, and sales; reviewed plans and supporting documents for all 14 active projects; read six months of status emails and steering notes; and inventoried every place project information is currently kept.

9 separate places where project status is kept	4 of 14 projects reported status in the last 30 days	7 weeks from team awareness to leadership visibility of the largest risk	23 open decisions without an assigned owner
--	--	--	---

KEY FINDINGS

1. Project information is fragmented

Project information is stored in nine places: personal spreadsheets, email threads, two vendor tools, a shared drive, and a partially built Smartsheet workspace. The sources do not yet agree on the number of active projects.

2. Intake follows an informal path

Five of the 14 projects started without a documented sponsor or business case. Work begins in response to individual leadership requests, without a consistent assessment of priority or capacity.

3. Status reporting varies by project

Four projects reported status in the last 30 days. The warehouse system team identified a data migration delay internally seven weeks before it reached the steering group.

4. Shared staffing constraints affect several projects

Three members of the IT integration team are allocated above 120% across five projects. Their availability constrains the schedules of these projects.

5. Open decisions lack owners and due dates

We found 23 open decisions in email and meeting notes with no owner or due date. Several had come up in more than one meeting without a recorded outcome.

6. Project leads need practical project management support

Nine of the 12 project leads have no formal project management training. They have operational experience and requested straightforward guidance, templates, and training.

ROOT CAUSES

ROOT CAUSE	FINDINGS IT EXPLAINS
No defined intake or prioritization step	2, 4
No standard reporting format, schedule, or definitions of red, amber, and green	1, 3
No regular forum where leadership reviews the portfolio and records decisions	3, 5
No role accountable for the portfolio as a whole	1, 3, 5, 6

IMPLICATIONS

The warehouse system cutover and fifth distribution center opening are scheduled in the same quarter and depend on the same limited staff. Without a shared capacity view and regular review, conflicts may be identified too late to adjust the plans. The next deliverable proposes a PMO structure and implementation plan using existing tools and staffing.