PMO PLAYBOOK

Implementing PMO processes on Salesforce

ALLYN IT

INTAKE PROJECT REQUESTS

Many successful businesses promote ideas and project requests from throughout the organization as an important source of innovation. Since Salesforce fits into the workflows of many of your users, it's a great place to store and manage requests & ideas.

Develop webforms and/or communities to enable users to submit ideas and requests using a standard intake process.
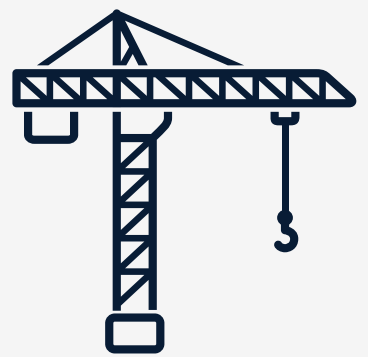
PRIORITIZE REQUESTS

Once requests have be input, you'll need ways to evaluate and prioritize requests. Define strategic goals and align requests with company priorities. Configure scorecards and evaluation processes to rank requests.

Design approval processes. Group and organize projects by portfolio, business unit, and function

PROJECT EXECUTION

Create project schedules & define milestones and stage-gates. Maintain risk registers, issue logs, and change requests.

Assign tasks to internal users and balance individual workloads. Record budgetary and actual project expenses. Collect project timecards.

MEASURE OUTCOMES

Develop portfolio level reports and dashboards for monitoring KPIs. Track capital and operational costs across your portfolios and projects. Automatically calculate standard metrics such as earned value, CPI, and ROI.