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## 2026 Project Management Symposium Papers

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# From Reactive to Predictive:

## *How AI Agents Are Redefining Project Delivery Intelligence*

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### Abstract

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Eighty-seven percent of delivery leaders want AI to detect risks earlier. Only 16% have it. That 71-point gap is not a technology problem. It is a data architecture problem, one that existing project management tools were not designed to solve. This paper argues that the path from reactive to predictive project delivery requires a fundamental shift in how organizations treat execution data: from siloed, tool-specific records to a unified, vendor-neutral intelligence layer capable of surfacing risk, automating reporting, and connecting delivery to business outcomes. Drawing from federal program experience, Fortune 500 transformations, and the development of ExecutelQ, an AI-powered Predictive Execution Intelligence platform, this paper presents a practical framework for delivery leaders navigating that shift.

### 1. Introduction: The Visibility Crisis in Project Delivery

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Organizations today are drowning in project data and starving for project intelligence. Delivery teams generate thousands of data points each week: tickets updated in Jira, messages exchanged in Slack, decisions buried in meeting notes, risks logged and forgotten in spreadsheets. Yet despite this volume of activity, the most common question in every status meeting remains: "Where are we, really?"

The answer is rarely clear. Status dashboards show green when projects are red. Risk registers are updated reactively, after damage is done. Program managers spend 10 to 20 hours every week gathering information that should be automatically available. And executives make strategic decisions based on data that is outdated the moment it is reported.

This is the visibility crisis, and it is not caused by a lack of tools. Most organizations already use three to seven project management tools simultaneously. The crisis is caused by fragmentation: critical context is scattered across platforms that were never designed to talk to each other, owned by vendors who have every incentive to keep data inside their ecosystems.

***"I don't want another status update. I want forward-looking insights to prevent problems." PM, r/projectmanagement***

That Reddit post captures what delivery leaders across every sector are experiencing. It also captures exactly what ExecutelQ was built to solve.

This paper presents the case for Predictive Execution Intelligence as a category and offers a practical framework for delivery leaders ready to make the shift from reactive to predictive.

AI in project management has become one of the most searched and discussed topics in the delivery leadership space. But the conversation has largely focused on automating tasks within existing tools. ExecutelQ reframes that conversation entirely. It is not a project management tool. It is a vendor-neutral intelligence layer built for organizations running fragmented delivery stacks who need one unified source of execution truth.

## 2. The Scale of the Problem

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### 2.1 What the Data Tells Us

Digital.ai's 18th Annual State of Agile Report, based on responses from 349 delivery leaders, reveals a demand-capability gap that should alarm every organization running complex programs:

- 87% of delivery leaders want AI to detect delivery risks earlier. Only 16% can.
- 95% want to automate repetitive tasks. Only 6% have AI-powered analytics.
- 47% report their tools are not integrated.
- 33% cannot correlate data across platforms.
- 52% cannot track the business impact of their own delivery work.

These are not emerging problems. They are chronic conditions that have persisted across tool generations, from spreadsheets to enterprise platforms to cloud-based collaboration suites. The tools changed. The fragmentation did not.

What has changed is the cost of the gap. In an era of constrained budgets, scrutinized headcount, and accelerating strategic timelines, the inability to surface risks early is no longer just an operational inconvenience. It is an organizational liability.

### 2.2 The Government and Regulated Sector Dimension

For government agencies, nonprofit organizations, and regulated industries, which represent the majority of the audience at this symposium, the stakes are amplified. Delayed projects do not simply cost money. They cost mission outcomes. They delay services to citizens. They create audit exposure. They put compliance deadlines at risk.

In January 2026, the Department of Defense issued a Request for Information (Notice ID: W911SR-JPEO-CBRN-IEW) seeking infrastructure to unify disparate operational data and transform it into actionable intelligence. The significance of this RFI cannot be overstated: the most well-resourced defense organization in the world, with billions in budget and access to every enterprise tool on the market, issued a formal notice acknowledging it does not have a solution for this problem.

If the DoD cannot solve execution intelligence with unlimited resources and existing tools, the problem is structural. It requires a different approach entirely.

ExecutelQ submitted a response to that RFI. The platform was built precisely for this gap.

## 3. The \$1.5 Million Word: A Case Study in Governance Failure

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The following case emerged from a forensic governance audit the author participated in as part of a practitioner executive program. Participants were presented with a composite case file, including a Statement of Work, internal vendor correspondence, a RAID log, and weekly project status reports, and tasked with identifying the source and financial magnitude of a governance failure in a \$1,000,000 critical infrastructure integration project. All organizational names have been anonymized.

### 3.1 The Setup

A global energy company contracted a technology vendor to build a real-time integration between two enterprise platforms ahead of a mandatory federal NERC CIP compliance audit. The Statement of Work was unambiguous: the integration was required to utilize OAuth 2.0

authentication protocol. The vendor signed the contract and collected a \$200,000 milestone payment.

What the client did not know was that the vendor's platform did not support OAuth 2.0, and would not until four months after the compliance deadline. Rather than disclose this, the vendor made a deliberate decision to conceal the incompatibility using carefully chosen language. Internal vendor correspondence revealed the strategy explicitly: instead of reporting that OAuth 2.0 had failed, the vendor would describe the situation as optimizing authentication protocols. The calculation was that by the time the client understood the issue was permanent, the project would be too far into user acceptance testing to terminate the contract.

### 3.2 The Concealment

For six consecutive weeks, the project status report was submitted as GREEN. The status report read:

***"The team is evaluating authentication protocols to optimize performance."***

The word optimizing kept it green. No escalation was triggered. No risk flag was raised.

During that period, \$25,000 per week continued to be spent on a project with an unresolved material breach at its core. That is \$150,000 in what governance frameworks term Zombie Spend. At a 10x EBITDA enterprise valuation multiple, this represented \$1,500,000 in destroyed enterprise value.

The governance failure was not technical. The tools existed. The risk had been logged. The breach was discoverable. What failed was language literacy: the organizational capacity to interrogate the words behind the status color.

### 3.3 The Resolution

When the breach was finally identified and quantified, a Compensating Control was engineered: a Quarterly API Key Rotation Standard Operating Procedure, ratified by the Architecture Review Board, that satisfied the NERC CIP audit requirement.

The vendor was then held commercially accountable for a \$150,000 Credit Memo covering the Zombie Spend, and a \$20,000 administrative penalty for the operational burden of the manual workaround, for a total recovery of \$170,000.

The lesson is not that vendors deceive. The lesson is that governance systems must be designed to make deception visible before it becomes irreversible.

### 3.4 What AI Would Have Caught

An execution intelligence layer, reading the same status reports, would have flagged this situation in Week 1, not Week 6. Here is how:

- Week 1: Language downgrade flag. Verb shift from high-agency to low-agency detected.
- Week 2: Silence signal. Absence of concrete technical progress notes flagged.
- Week 3: Concealment language pattern. Repeated use of evaluating, optimizing, and monitoring detected.
- Week 4: Contract-to-status mismatch. OAuth 2.0 requirement present in contract, absent from status reports. Material breach risk surfaced.

Caught in Week 1. Not Week 6. \$150,000 saved. \$1.5 million protected.

This is not hypothetical. This is the core capability ExecutelQ was built to deliver: AI that reads what humans write and surfaces what the data actually means.

## 4. Why Existing Tools Cannot Solve This Problem

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The instinctive response to a visibility problem is to add another tool. Buy a dashboard. Implement a new PMO platform. Mandate a reporting template. These responses are understandable and consistently ineffective.

The reason is structural. Existing project management tools are designed to record work activity within a single platform. Jira records what happens in Jira. Slack captures what is said in Slack. SharePoint stores what is uploaded to SharePoint. Each tool generates its own data, in its own format, under its own governance model.

When an organization runs three, four, or five of these tools simultaneously, which is the default in mid-market and enterprise environments, the result is not project intelligence. It is project archaeology: manually excavating context from multiple disconnected sources to reconstruct a picture of what is actually happening.

### 4.1 The Vendor Incentive Problem

The major enterprise software vendors, Microsoft, Atlassian, and others, have built AI capabilities into their platforms. Microsoft Copilot integrates deeply with Teams, SharePoint, and Azure DevOps. Atlassian Rovo is designed to surface intelligence from within the Atlassian ecosystem.

These are valuable tools within their ecosystems. But they share a structural limitation: they are architecturally optimized for their home platforms. A Microsoft Copilot deployment sees Microsoft. An Atlassian Rovo deployment sees Atlassian. Neither was designed, and neither has the incentive, to index and analyze competitor platforms with equal depth and fidelity.

The result is that organizations running mixed delivery stacks, which is nearly every mid-market and enterprise organization, have no vendor-neutral intelligence layer. They have siloed AI capabilities that deepen existing fragmentation rather than resolving it.

ExecutelQ was built to occupy the gap that vendor AI cannot fill: a vendor-neutral intelligence layer that connects Jira and Azure DevOps, Slack and Teams, Confluence and SharePoint, and surfaces intelligence across all of them simultaneously.

***Vendor AI has a home team. ExecutelQ doesn't.***

What organizations need is not another tool in the stack. They need an operating system for execution intelligence. ExecutelQ functions as the AI OS for predictive execution intelligence, sitting above every tool an organization already uses, reading across all of them simultaneously, and surfacing what no single-vendor platform is architecturally designed to see.

## 5. The Data Journey: From Scattered to Connected

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Before an organization can achieve predictive execution intelligence, its data must travel a journey. Understanding where an organization sits on this journey is the essential first step in any AI adoption strategy.

ExecutelQ's Data Journey Framework defines seven stages:

### Stage 1: Scattered

Data exists everywhere and is accessible from nowhere as a unified whole. Critical context lives in Slack threads that were never documented, meeting notes that were never captured, and email chains that were never indexed. Every team member carries their own version of project truth.

### **Stage 2: Unified**

The first intervention is aggregation. A vendor-neutral intelligence layer connects to all active tools, regardless of vendor, and creates a single source of truth. Not by replacing existing tools, but by sitting above them and reading across all of them simultaneously.

### **Stage 3: Remembered**

Once unified, context must be persistent. Full project memory means that decisions made six months ago are as accessible as decisions made yesterday. New team members can onboard in days rather than weeks. No institutional knowledge is lost when someone transitions off a program.

This is what it means to become a queryable company. Every decision, every dependency, every discussion becomes instantly accessible through natural language. Not locked in someone's inbox. Not buried in a thread. Not lost when a team member transitions off a program. Accessible. Searchable. Actionable.

### **Stage 4: Analyzed**

With clean, unified, persistent data, AI can do its work. Pattern recognition at scale, across thousands of messages, tickets, and documents, surfaces signals that human reviewers would miss: language shifts, dependency gaps, velocity anomalies, communication silences.

### **Stage 5: Surfaced**

Intelligence is only valuable if it reaches the right people at the right time. The transition from Analyzed to Surfaced is the shift from AI that detects to AI that delivers. Insights are pushed to delivery leaders proactively, not buried in dashboards that require manual navigation.

### **Stage 6: Decided**

Data-backed prioritization replaces urgency-based decision making. When every recommendation is traceable to its source, the specific ticket, message, or document that triggered the flag, delivery leaders can act with confidence rather than intuition.

### **Stage 7: Connected**

The final stage connects execution to outcomes. Delivery work is mapped to KPIs, OKRs, and strategic goals. Leadership can see not just what is being delivered, but what business value that delivery is generating or protecting. The program manager becomes a strategic partner, not just a status reporter.

ExecutelQ is architected to move organizations through this journey, starting wherever they are today and building toward full execution intelligence.

## **6. The 10 Shifts: What Delivery Leadership Must Become**

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The emergence of agentic AI in project delivery is not simply a technology upgrade. It is a role redefinition. The capabilities that have historically defined the hard skills of project management, dependency tracking, risk logging, status reporting, capacity planning, are becoming features of intelligent software.

This does not eliminate the need for skilled delivery leaders. It fundamentally changes what those leaders should be doing with their time.

The following 10 Shifts define the transformation from operator to strategist:

- Manual Tracking → Auto-Flagged Dependencies: AI surfaces blockers before they delay work.
- Resource Conflicts → Proactive Capacity Planning: Gaps identified before overcommitment occurs.
- Chasing Updates → Auto-Generated Status: Reports generated from actual work activity, not manual aggregation.
- Manual Risk Logs → Predictive Risk Detection: Patterns and language signals surface risks automatically.
- Scattered Data → Unified Project Memory: One source of truth across all tools and vendors.
- Firefighting → Proactive Intervention: Problems addressed before they become crises.
- Reactive Reporting → Prevention Proof: Leadership briefed on what was prevented, not just what went wrong.
- Admin Burden → Execution Focus: Delivery teams freed from administrative overhead.
- Disconnected Execution → Outcome-Driven Decisions: Every sprint tied to business value.
- Assumption-Based → Data-Driven Priority: Prioritization driven by data and impact, not urgency and noise.

The organizations that make these shifts will not simply be more efficient. They will be operating at a fundamentally different level of strategic capability. The question is not whether agentic AI will drive these shifts. It already is. The question is whether delivery leaders will lead the transition or be managed by it.

## 7. Predictive Execution Intelligence in Practice

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The following three use cases demonstrate how ExecutelQ's intelligence layer translates the Data Journey Framework into measurable operational impact.

### Use Case 1: Eliminating the Admin Tax

The average delivery leader spends 10 to 20 hours per week gathering status: checking tools, chasing team members, synthesizing updates, and formatting reports. For an organization with 10 program managers, that represents 100 to 200 hours of weekly capacity consumed by information aggregation rather than strategic delivery.

ExecutelQ's automated reporting capability scans connected tools, including Jira, Slack, Azure DevOps, Confluence, and SharePoint, and generates draft status reports in seconds, grounded in actual work activity rather than self-reported updates. The result is not just time saved. It is the elimination of a structural incentive for status manipulation: when reports are generated from real data, there is no opportunity to game the color.

At a conservative estimate of \$75 per hour, or the equivalent fully loaded contractor rate in government environments, 10 PMs reclaiming 10 hours per week generates \$375,000 in annual capacity. That is before accounting for the strategic value of what those hours are redirected toward.

## Use Case 2: Predictive Risk Detection

Returning to the war room case study: an execution intelligence layer would have flagged the OAuth 2.0 concealment in Week 1 through language analysis alone. The broader capability extends far beyond a single case.

ExecutelQ monitors communication signals across Slack, Teams, and email, alongside ticket data in Jira and Azure DevOps, to detect patterns that precede delivery failures: language downgrade signals, communication silences, velocity anomalies, dependency staleness, and contract-to-status mismatches.

The critical design principle is explainability. ExecutelQ does not simply flag a risk. It cites the specific source: the message, the ticket, the document that triggered the alert. The delivery leader decides what to do. AI surfaces. Humans decide. Always.

## Use Case 3: Institutional Memory and Onboarding

When a senior program manager transitions off a program, they take years of institutional context with them. Decisions made, options rejected, stakeholder dynamics navigated: this knowledge exists nowhere in any tool. It lives in the departing PM's memory.

ExecutelQ's full project memory capability changes this equation. Every decision, dependency, and discussion is indexed and accessible through natural language query. A new team member can ask: "What was the rationale for the authentication approach in Phase 2?" and receive a sourced, contextualized answer in seconds, drawn from the actual Slack conversation, meeting notes, and ticket history where that decision was made.

The result: new hires become productive in days, not weeks. Institutional knowledge survives personnel transitions. Program continuity is protected.

## 8. A Practical Framework for Implementation

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For delivery leaders ready to begin the transition from reactive to predictive, the following three-step framework provides an actionable starting point.

### Step 1: Audit Your Visibility Gaps

Before selecting any tool or platform, conduct an honest assessment of where critical context currently lives in your organization. Three diagnostic questions:

- How many tools does a team member need to check to fully answer: what is blocking us right now?
- Where does high-stakes context consistently get lost? In Slack threads? Meeting notes? Email chains?
- What risks have you discovered in the last 90 days that were already causing damage when they surfaced?

The answers define your visibility gap and your highest-value intervention points. ExecutelQ's Visibility Gap Audit Template, available at [ExecutelQ.ai/UMD-Resources](https://ExecutelQ.ai/UMD-Resources), provides a structured diagnostic for this assessment.

### Step 2: Calculate the True Cost of the Status Quo

Visibility gaps carry costs that rarely appear on a project budget but compound significantly at the organizational level. A simple three-cost model captures the full picture:

- Time Cost: Number of PMs multiplied by hours per week spent on status gathering, multiplied by fully loaded hourly rate, multiplied by 50 working weeks.
- Risk Cost: Number of delayed or derailed projects in the last 12 months, multiplied by the estimated cost of each delay.
- Opportunity Cost: The strategic work, including process improvement, stakeholder engagement, and innovation, that is not happening because delivery leaders are buried in administrative overhead.

For a team of 10 program managers spending 10 hours per week on status at \$75 per hour, the annual time cost alone exceeds \$375,000. Adding three delayed projects at \$500,000 each brings the total organizational cost to \$1.875 million per year, before opportunity cost is factored in.

This is the business case. It is not an estimate. It is a calculation. ExecutelQ's Business Case Calculator, available at [ExecutelQ.ai/UMD-Resources](https://ExecutelQ.ai/UMD-Resources), provides a customizable model for your organization's specific parameters.

### Step 3: Identify One Quick Win and Pilot It

Transformation does not begin with transformation. It begins with one workflow, piloted deliberately, measured rigorously, and used to build the internal case for broader adoption. The highest-leverage starting points for most organizations are:

- Automated status reporting: immediate time recovery, low implementation risk.
- Dependency tracking automation: prevents the most common source of mid-sprint derailment.
- Compliance reporting automation: particularly high value for government and regulated sector organizations facing audit requirements.

Start small. Prove value. Scale from there.

## 9. Conclusion: The Intelligence Imperative

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The shift from reactive to predictive project delivery is not optional. It is already underway. The organizations and leaders who understand this shift, and who build the data infrastructure to enable it, will operate at a categorically different level of strategic capability than those who continue to manage projects the way they always have.

The war room case study is not an outlier. It is a pattern. Projects go green-to-red overnight because the signals were always there, buried in language and data that no one was systematically reading. The 71-point gap between what delivery leaders want from AI and what they currently have is not a statement about the limitations of technology. It is a statement about the limitations of fragmented data architecture.

ExecutelQ exists to close that gap. Not by replacing the tools organizations already use. Not by adding another platform to manage. But by sitting above the existing delivery stack, vendor-neutral, integration-agnostic, and architecturally designed to see what no single-vendor tool can see.

The hard skills of the program manager are becoming features of intelligent software. The question is not whether this transition will happen. It already has.

The question is: will you keep operating, or start leading?

To access the five practitioner frameworks referenced in this paper, including the 10 Shifts Framework, Visibility Gap Audit Template, Quick Win Prioritization Matrix, Business Case Calculator, and Implementation Roadmap Playbook, visit [ExecutelQ.ai/UMD-Resources](https://ExecutelQ.ai/UMD-Resources). All resources are available at no cost.

## About the Author

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Dr. Gloria Enjuweh is the Founder and CEO of ExecutelQ, an AI OS for Predictive Execution Intelligence purpose-built for delivery leaders and executives in organizations running complex, multi-tool delivery environments across private and public sectors. By day, she serves as a Senior Agile Project Delivery Leader for Federal agencies, holding an active DoD Secret Clearance (Tier 3). She holds a Doctorate from Tufts University, PMP, SAFe SPC, SAFe RTE, and ICP-ACC certifications, and has completed executive education in AI Strategy at MIT Sloan and Harvard Business School, and Data Strategy at UC Berkeley Haas. She is the recipient of the 2025 Innovation Award from the FJ - MAD, for a federal modernization project delivered ahead of schedule and under budget. She is the author of The Execution Intelligence Report newsletter and speaks nationally on the intersection of AI, delivery leadership, execution intelligence, and organizational performance.

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# Driving Business Success Through Project Managers by Evolving Our Processes, Our Tools, and Ourselves

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## Abstract:

Building a structured project management community of practice can help engage project managers and support successful project execution. A coordinated approach to stakeholder engagement, professional development, knowledge management, and community building can strengthen relationships, facilitate sharing lessons learned and best practices, support continuous project improvement, and drive project success.

This paper presents a case study of how one company met the challenges project managers faced in a project-driven organization by establishing a virtual, one-hour, recurring project management professional development session. The community of practice sessions provided opportunities for continuous improvement in stakeholder engagement and knowledge management. Lessons learned highlight how servant leadership and community building can drive business success through project management.

## Introduction:

Project management office (PMO) responsibilities include creating opportunities for knowledge transfer and professional development. Ideally, a PMO will develop a systematic approach to effectively leverage lessons learned from one project to the next to manage knowledge and adapt to changing project environments. The PMO can play a critical role in standardizing processes, tools, stakeholder engagement, and sharing knowledge and experiences between projects.

A community of practice is one effective example of a structured platform for project management learning. Researchers have found that informal discussions within strong social networks transfer project knowledge more effectively than technological solutions and that “interpersonal relationships are significantly correlated with knowledge transfer and individual performance” (Wiewiora et al., 2010). Building communities of practice may also contribute to a strong culture of accountability—another risk mitigation tool that contributes to project success.

This case study demonstrates how a structured project management community of practice supported by active stakeholder engagement can drive innovations and process improvements and support the strategic goals of your organization.

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### The Challenge

PMOs are crucial for ensuring project success and connecting organizational strategy to project outcomes as projects face rapidly changing project environments and complex challenges. Many PMOs struggle with overcoming organizational silos and a lack of knowledge management and professional development. In project-driven organizations where project managers are assigned or hired to support projects full-time, their day-to-day work centers on a single project or small set of projects. This structure can limit exposure to other project teams and organizational initiatives, thereby reinforcing silos and reducing awareness of the broader organizational context. The independent nature of project operations can make sharing lessons learned between projects challenging. Project managers may employ risk mitigation strategies on their own projects but may not have the opportunity to share them more broadly with other projects that could also benefit.

When project managers are disconnected from the broader company ecosystem, the organization may miss opportunities for innovation and struggle with fragmented, duplicative processes. Project managers working full-time on one project may not understand how broader organizational strategic goals are connected to their project work. They may not be aware of shifts that functional departments are making to support those goals or how those shifts may affect their projects. The project-based structure may also leave project managers with few avenues to connect with one another.

Dynamic skill building is vital for project management because the environments in which projects operate are changing. In a *Harvard Business Review* article, Ryan Roslansky, the CEO of LinkedIn, shared that “the average LinkedIn member has seen the skills needed for their job change by 25% over the past eight years. That number is expected to reach at least 65% by 2030 due to AI” (Roslansky, 2023). In addition, a 2013 study in the *Journal of Management Development* found that “...‘employee involvement’ [as] measured by empowerment, team orientation, and capacity development...positively influences organizational effectiveness.” (1). Without an established practice of skill building and knowledge sharing for project managers, PMOs miss opportunities to improve employee engagement and organizational effectiveness.

Despite clear benefits of building community and capability among project managers, many PMOs suffer from knowledge silos and stakeholder disengagement and lack a reliable, structured system to engage project managers and expand their skills.

### Case Study

The PMO of JBS International, a project-based, mission-driven, and values-driven company that helps clients create sustainable change to improve people’s lives, established a virtual, one-hour, recurring project management professional development session called “Project Management Power Hour” (PM Power Hour).

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The goals of the PM Power Hour are to enhance project manager knowledge surrounding the use of new and existing tools and resources and to develop a sense of community and collaboration across projects and functional areas, including IT, Human Resources (HR), Finance, etc.

The format of PM Power Hours is flexible based on the topic and the needs of attendees. It may consist of a one-hour demonstration of a new tool or a half-hour presentation with breakout sessions to apply knowledge and connect with fellow project managers. The PM Power Hours also includes polls and surveys to increase engagement of attendees and to assess what project managers understand on the topic. For some topics, presenters include project success stories and highlights.

Before the first PM Power Hour, managers surveyed project managers on the preferred times to hold the PM Power Hours. With this feedback, the PMO was enabled to make informed decisions about scheduling the PM Power Hours on alternating days every other month. The PM Power Hours were also set to automatically record and to be available asynchronously. Attending in person or watching the recording are mandatory for project management staff. PM Power Hour sessions qualify for Project Management Institute (PMI) professional development units (PDUs). The PDUs offered through PM Power Hours align with all three PMI skill categories: Ways of Working, Power Skills, and Business Acumen. This added benefit helps staff certified as Project Management Professionals (PMPs) maintain certification and may incentivize participation.

### **SWOT Analysis and Topic Curation**

To understand the needs of project managers in the organization, PMO staff conducted a Strengths, Weaknesses, Opportunities, Threats (SWOT) analysis and interviewed project managers. Additionally, the PMO staff reviewed the risks, opportunities, and issues (ROI) register to identify where additional training or support for project managers may mitigate risks or avoid problems. This process generated topic ideas for PM Power Hours. Additionally, this approach enabled the PMO to prioritize topic areas for the PM Power Hour and build a log of topics for future meetings. During ongoing planning sessions, the PMO staff refines the log while referencing the SWOT, ROI register, and interview feedback. Current needs of project managers and other stakeholders inform priorities related to the topic log.

### **Stakeholder Engagement**

Prior to the first PM Power Hour, the PMO conducted a stakeholder analysis, which revealed the broad nature of types of employees who would benefit from the PM Power Hours. Stakeholders included staff in functional areas, such as Finance, HR, and IT. The inclusion of those stakeholders in the development of topics may keep stakeholders outside of the PMO engaged with the efforts and outcomes of project managers and potentially reduce silos between functional areas. For example, when presenting how to use a Cost-To-Complete (CTC) template, a leader in the Contracts Office joined the PMO presenter to share how the contract type informed the inputs to the CTC. In another presentation, this time focused on using AI, two staff members

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who work in communications presented a framework for how to find the best AI tool for their work. This presentation helped attendees expand their knowledge of other projects, thereby reducing silos, and built understanding of how to leverage new technology to benefit their projects.

Depending on the topic and relevance to staff outside of project management, employees on other teams, including aspiring project managers, may be invited to attend and participate. Opening PM Power Hour attendance to aspiring project managers provides further professional development for those on a project management career track and enhances overall project management skills for the organization.

Each PM Power Hour presentation includes a “must know” slide in the presentation where recent organizational announcements, requirements, or requests are shared as a reminder. This lets the presenter highlight the priorities of departments outside the PMO.

### Community of Practice

One of the goals of the PM Power Hours is for project managers to connect as a community of practice. To facilitate this, project managers of all levels are invited to present a success story, tool, or lesson learned from their projects during PM Power Hours. Through these presentations, the PMO encourages innovative approaches by spotlighting high-performing project managers, regardless of their tenure with JBS or their career stage.

Every PM Power Hour includes engagement tools: quizzes, surveys, and breakout rooms. Breakout groups are often facilitated by peer project managers. The breakout rooms have a dual purpose of building community as well as enhancing skills. An important goal for the PM Power Hours is creating an environment for project managers to develop inter-project relationships. In the breakout rooms, project managers meet colleagues, learn about their projects, and share approaches to the challenges or skills being discussed. At the end of the PM Power Hour, attendees receive a survey on their perceptions of their skills and their connections with other project managers in the organization.

### Results & Lessons Learned:

#### Stakeholder Engagement and Communities of Practice

In the 9 Power Hours held between May 2024 and February 2026, 74% of the 213 non-unique attendees who responded to the poll reported that they somewhat agree or agree that the PM Power Hour “helped me develop connections with other project managers.”

When presenters engage stakeholders from outside of project management in the selection of topics, project managers better understand the needs of stakeholders across the organization and increase cross-department collaboration. For example, a PM Power Hour on the topic of project launch processes included a guest speaker

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from the Contracts Office. When surveyed after the meeting, 100% of poll respondents reported that they somewhat agree or agree with the statement “I understand the importance of knowing my contract type.” By including a functional department expert, project managers learned what is needed for a project launch to be successful from the Contracts Office perspective. In *Enhancing Sustainability in Project Management: The Role of Stakeholder Engagement and Knowledge Management in Virtual Team Environments*, the authors write that when stakeholders actively engage in learning, communities of practice emerge that “...create a sense of belonging and enable employees to learn from each other, leading to increased innovation and productivity” (Blak Bernat et al., 2023). Collaborating with stakeholders external to the PMO can strengthen knowledge management practices and support progress toward the organization’s strategic goals.

### Value Creation

Establishing reliable and open spaces for learning and sharing can promote a culture of continuous improvement and collaboration. This practice can also serve to demonstrate the value of PMO. In PMI’s PMO Value Ring™ Framework, the authors state, “[At] the core of the PMO Value Ring™ framework lies the critical alignment between projects and...the overarching objectives of the organization” (PMI, 101). An important section of the Value Ring™ Framework is “service operation.” Through effective management of service operations, such as investing in team member development and fostering a learning culture, the PMO can demonstrate value and advance organizational strategies.

By connecting strategic goals of the organization to the learning objectives for the PM Power Hours, project managers may more clearly comprehend the relationship between organizational strategy and their project outcomes. Through maintaining active stakeholder engagement, employees are supported to understand the value the PMO brings to their organization.

PM Power Hours serve to create a culture of accountability and the structure to enforce it through pairing clear expectations with comprehensive support. The PMO can reinforce accountability by standardizing practices via a mechanism like the PM Power Hour. Because of the training provided in the Power Hours, leaders who supervise project managers can expect a consistent baseline level of skill and process adherence from all project managers as part of quarterly performance assessments. At the same time, by creating a community of practice, the PM Power Hour can foster social accountability, creating a “collaborative environment where team members hold each other responsible for achieving shared goals” (Ahmad et al., 2023). The PMO can add value to the organization by building competency and community.

### Continuous Quality Improvement & Change Management

The PMO can continuously improve the Power Hours by reviewing poll results and adjusting topics, format, and/or delivery. With further review of the poll responses, PM Power Hours without breakout rooms, case studies from active projects, or facilitation by different project managers received lower levels of “somewhat agree”

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or “agree” ratings, as compared to PM Power Hours with these engaging elements. The PMO team responded by incorporating more of these components to provide additional opportunities for project managers to develop community.

A key component to the successful establishment of a culture of continuous improvement and stakeholder engagement is servant leadership. A servant leader “...serves to build the competencies of followers, remove hindrances, encourage innovation, and [empower] creative problem-solving and organizational dynamics” (Nauman et al., 2022, 17) Servant leadership also emphasizes a strong relationship with all stakeholders, facilitating a collaborative culture.

Servant leaders create space for successful change management. In a Power Hour on the topic of using automations in project management information systems (PMIS), one attendee shared their feedback regarding the announcement of an upcoming migration to a new enterprise-wide PMIS with “[kudos] to the PMO team for communicating this upcoming change well in advance of the platform transition and for providing some context and sharing the plan/timeframe for this transition” (JBS, 2026) A model like the PM Power Hour creates a recurring point of contact for project managers to engage in a structured process for organizational change, as reinforced in the Prosci 3-Phase Process. This process has three parts: Phase 1– Prepare Approach, Phase 2 – Manage Change, and Phase 3 – Sustain Outcomes. Each phase can be addressed during a successive, or recurring, PM Power Hour session.

### Structure

The predictable and recurring nature of the PM Power Hours is fundamental to achieving PMO and organizational strategic goals. The CEO of RAIDLOG.com and co-host of the *Project Management Happy Hour* podcast, Kim Essendrup shares the idea of “trust bricks”:

*Trust...is like a brick wall. If I want to build a strong wall, I need to demonstrate that I'm trustworthy many times. Each time I do that, I add another brick. Over time, this builds trust that's like a strong, brick wall* (Essendrup, n.d.).

Each time a PM Power Hour is scheduled as part of a predictable cadence and successfully held, stakeholders’ confidence in the reliability of the learning space may increase. Reliability encourages trust. Operating within a set routine lowers the barriers for stakeholders to engage because they know when the PM Power Hours will be held, how to access the material shared, and what standard tools project managers are being trained to use. Providing frequent response points before, during, and after a session may also build trust and engagement (see Table 1, below).

Table 1. Engagement and Feedback Opportunities.

Time	Response Point
Before Virtual Session	<ol style="list-style-type: none"><li>1. Requesting support for breakout room moderation</li><li>2. Soliciting speakers for a “Project Spotlight,” where project managers share lessons learned or new tool/technology</li></ol>

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	3. Sharing agenda in advance and inviting feedback
During Virtual Session	<ol style="list-style-type: none"><li>1. Deploying surveys, polls, and quizzes</li><li>2. Holding breakout rooms with prepared questions and discussion talking points</li><li>3. Developing simulations for breakout rooms so participants can practice the skills discussed</li></ol>
After Virtual Session	<ol style="list-style-type: none"><li>1. Surveying participants routinely before and/or after the end of a session</li><li>2. Follow up with recording via email and posting in virtual shared space</li><li>3. Requesting feedback by email or in shared virtual spaces</li><li>4. Conducting one-on-one interviews with participants</li></ol>

To create high-quality virtual sessions, include key stakeholders in the slide development, review process, and scheduled practice sessions in advance of the actual event. This systematic preparation will ensure that the training is well structured, is appropriate for the audience, and uses technology effectively.

### Conclusions

This case study highlights how a PMO can expand knowledge of processes, tools, and resources among project managers to drive organizational success. Key lessons learned include keeping stakeholders engaged through structured stakeholder analysis and ongoing communication, and how servant leadership and community building can create value through successful projects. Ask project managers what they need and what they can offer others. Collaborate with counterparts in other business areas to understand how the PMO and project managers can address their needs and how project management skills contribute to their departmental goals. Build systems that inspire trust through reliability. Foster continuous innovation and practical knowledge management by routinely connecting with stakeholders and creating space to share lessons learned, new tools, best practices, and project success outcomes.

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# The Strategic PMO: Leading with Vision, Driving Transformation, and Delivering Value

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## ABSTRACT

In today's complex and rapidly evolving business environment, Project Management Offices (PMOs) must transition from governance-focused entities to strategic enablers of enterprise value. Drawing on leadership of a \$1.6B+ federal Enterprise Infrastructure Solutions portfolio, this paper presents a practitioner-informed framework for transforming PMOs into drivers of alignment, execution, and measurable outcomes.

Results from the portfolio indicate that organizations operating under traditional PMO models often experience misalignment, delayed decision-making, and inconsistent delivery performance, not due to lack of capability, but due to a disconnect between strategy and execution. Through the implementation of a Strategic PMO model centered on vision, alignment, execution, and value, measurable improvements were achieved, including a 30% increase in delivery velocity, reductions in decision latency of 25–40%, and improved stakeholder confidence.

This paper contributes a practical and scalable model for organizations seeking to reposition the PMO as a strategic function that enables transformation and delivers sustained organizational impact.

## INTRODUCTION

Organizations today operate in an environment defined by speed, complexity, and continuous transformation. They are expected to deliver more, faster, and with greater precision, while navigating increasing dependencies across systems, teams, and stakeholders. In this environment, execution alone is no longer sufficient to ensure success.

Historically, Project Management Offices were designed to provide governance, enforce standards, and track execution performance. While these capabilities remain necessary, they were built for environments that were more predictable and less interconnected. As a result, many PMOs remain positioned as oversight functions, focused on reporting and compliance rather than impact.

What becomes evident in practice is that organizations do not struggle because of a lack of effort or capability. They struggle when execution is disconnected from strategy. Teams work, deliverables are produced, and milestones are tracked, yet outcomes fall short because alignment is missing.

This paper examines how the PMO must evolve to address this gap and demonstrates, through real-world application, how a Strategic PMO model can significantly improve alignment, execution, and organizational performance.

## INDUSTRY CONTEXT AND LITERATURE

The evolution of the PMO reflects a broader shift in how organizations approach execution. Early PMOs were primarily administrative, focused on documentation, reporting, and process adherence. Over time, they expanded to include governance, risk management, and portfolio oversight.

Recent industry research indicates a continued shift in PMO expectations from administrative oversight to value delivery and strategic alignment. Organizations that fail to evolve their PMOs often experience execution gaps, delayed decision-making, and fragmented stakeholder engagement (Müller et al., 2020). Similarly, Too and Weaver (2020) emphasize that governance frameworks must adapt to support flexibility and responsiveness rather than enforce rigid control.

However, modern organizations require more than visibility. They require insight, alignment, and the ability to make informed decisions quickly. This has led to an expectation that PMOs function as strategic partners, contributing directly to outcomes rather than simply monitoring progress.

Despite this shift, many PMOs remain constrained by legacy models that prioritize control over adaptability and reporting over insight. These limitations create delays, inefficiencies, and misalignment, particularly in complex transformation environments.

The need for a Strategic PMO is therefore not theoretical. It is a direct response to the demands of modern execution environments.

### CASE CONTEXT: FEDERAL EIS PORTFOLIO

The case examined in this study involves a \$1.6B+ federal Enterprise Infrastructure Solutions (EIS) portfolio supporting large-scale telecommunications and infrastructure modernization across multiple agencies. The portfolio operated within a highly regulated environment and required coordination across multiple stakeholders, systems, and delivery teams.

#### *Portfolio Overview*

The portfolio encompassed a broad range of initiatives, including cloud integration, data center migrations, network transformation, and enterprise service delivery. These efforts were executed across distributed teams spanning engineering, operations, and program management functions.

The operating environment was inherently complex, characterized by competing stakeholder priorities, strict regulatory and contractual requirements, and significant interdependencies across programs. The portfolio supported mission-critical operations, where execution delays or failures carried substantial operational and financial risk.

Within this environment, the PMO was responsible for coordinating delivery across multiple programs while maintaining alignment with agency objectives and contractual obligations.

## ***Initial Challenges***

At the outset, the PMO operated within a traditional governance model. While established processes and reporting structures were in place, execution challenges persisted.

Misalignment across stakeholders resulted in conflicting priorities and inconsistent direction across programs. Decision-making was frequently delayed due to unclear escalation pathways and fragmented communication channels. In addition, reporting mechanisms focused primarily on retrospective status updates, providing limited visibility into emerging risks and cross-program dependencies.

These challenges were further compounded by gaps in coordination across teams, reducing the organization's ability to respond effectively to change and manage interdependencies.

As a result, delivery performance was impacted not by a lack of capability, but by a disconnect between strategy and execution.

## **STRATEGIC PMO TRANSFORMATION**

The transformation of the PMO required a deliberate and disciplined shift in both structure and mindset. While the existing model provided governance and reporting capabilities, it lacked the ability to consistently drive alignment, enable timely decision-making, and influence execution outcomes across a complex portfolio environment.

To address these limitations, this shift repositioned the PMO from a governance-centric function to a strategic execution enabler. In this capacity, the PMO assumed responsibility for facilitating alignment across stakeholders, supporting informed decision-making, and ensuring that execution efforts remained directly connected to organizational objectives.

### **The work was guided by a simple but important principle:**

The PMO should not exist to track work. It should exist to enable the organization to execute more effectively.

### ***Operating Model Changes***

Several operating model changes helped translate the transformation into practice and improved execution performance and coordination across the portfolio.

Governance structures were redesigned to reduce decision latency and provide clear pathways for escalation. Rather than creating additional layers of review, governance was streamlined to enable faster, more effective decision-making.

Consistent stakeholder alignment cadences were introduced, ensuring that priorities, risks, and dependencies were regularly communicated and reinforced across teams. These structured touchpoints improved transparency and reduced misalignment across programs.

Reporting was fundamentally shifted from retrospective status tracking to forward-looking, insight-driven communication. This enabled leadership to engage earlier, make informed decisions, and proactively address emerging risks.

In addition, cross-program dependency tracking was implemented to provide visibility into interdependencies that previously went unmanaged. This allowed the organization to identify potential conflicts early and coordinate efforts more effectively.

Collectively, these changes created a more connected, responsive, and performance-driven execution environment.

## STRATEGIC PMO FRAMEWORK

The Strategic PMO framework is composed of four integrated components: Vision, Alignment, Execution, and Value. These elements function as an interconnected system that enables the PMO to translate organizational strategy into consistent and measurable outcomes.

Vision establishes the purpose and defines the desired outcomes aligned to mission and enterprise objectives. It provides direction and ensures that all initiatives are grounded in a clear understanding of what success looks like. Without a well-defined vision, execution becomes fragmented and priorities lack coherence.

Alignment ensures that stakeholders, teams, and initiatives operate with shared priorities. In complex environments, alignment does not occur organically; it must be intentionally established and continuously reinforced. The PMO plays a central role in facilitating this alignment, connecting strategy to execution across programs and organizational boundaries.

Execution represents the disciplined delivery of work through structured yet adaptable processes. While consistency is essential for maintaining control and accountability, execution must also remain flexible to respond to evolving requirements, dependencies, and risks. A strategic PMO enables this balance, ensuring that delivery remains both reliable and responsive.

Value focuses on the measurement and communication of outcomes. Rather than emphasizing activity or task completion, the PMO evaluates success based on impact, including delivery performance, risk reduction, and stakeholder confidence. This shift from activity-based metrics to outcome-based measurement is critical in positioning the PMO as a strategic contributor.

Collectively, these components provide a repeatable and scalable model for connecting strategy to execution. By integrating vision, alignment, execution, and value, the Strategic PMO framework ensures that initiatives are not only delivered, but that they contribute meaningfully to organizational objectives.

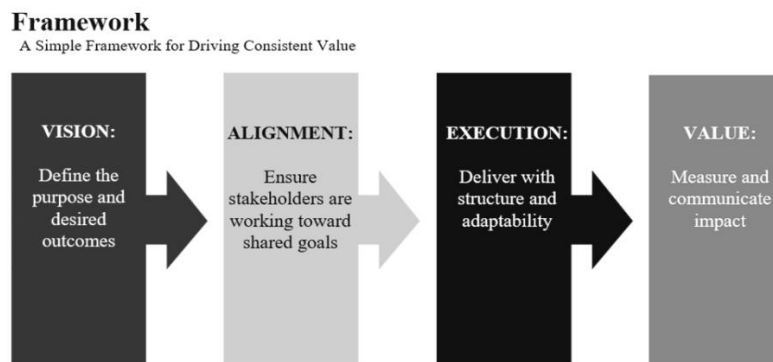


Figure 1: Strategic PMO Framework

# IMPLEMENTATION IN PRACTICE

In practice, the Strategic PMO framework took shape through structured governance and communication mechanisms designed to translate alignment into execution and support the transition from traditional control functions to strategic enablement, as illustrated in Figure 2.

Historically, the PMO operated within a control-oriented model focused on compliance, reporting, and oversight. To evolve beyond this model, implementation efforts were intentionally designed to enable insight, alignment, and decision support across the portfolio.

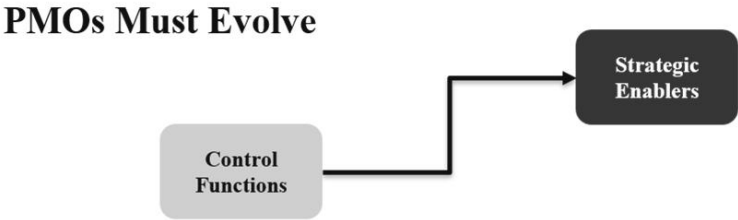
Weekly executive alignment sessions were introduced to provide consistent visibility into priorities, risks, dependencies, and key decision points. These sessions shifted the PMO’s role from reporting status to actively facilitating alignment and enabling leadership decisions.

Reporting mechanisms were redesigned to emphasize forward-looking trends, interdependencies, and actionable insights rather than static updates. This shift enabled stakeholders to anticipate risks and respond proactively, reinforcing the PMO’s role as a decision-support function rather than a reporting entity.

Clearly defined escalation pathways reduced ambiguity and improved the speed and effectiveness of issue resolution. This allowed the organization to move away from reactive oversight and toward proactive coordination and execution.

Cross-program dependency tracking provided critical visibility into interdependencies, enabling leadership to manage risks before they impacted delivery timelines. This capability strengthened alignment across teams and ensured more coordinated execution.

Together, these mechanisms brought the shift shown in Figure 2 into daily execution, transforming the PMO from a control-based function into a strategic enabler of performance, alignment, and value delivery.



- Traditional PMOs focused on compliance, reporting, and control
- Modern organizations require insight, alignment, and decision support
- The PMO’s role has shifted from oversight to value creation

Figure 2: PMO Evolution Model

## RESULTS AND IMPACT

After implementation, several measurable improvements were observed across the portfolio.

Decision latency decreased by approximately 25–40%, driven by structured escalation pathways and alignment mechanisms. Delivery velocity improved by approximately 30%, reflecting increased coordination and reduced rework.

Stakeholder alignment became more consistent, reducing conflicting priorities and enhancing collaboration. Risk visibility increased by approximately 30%, enabling proactive mitigation strategies.

Financially, improved governance and operational oversight resulted in the identification and recovery of over \$2.5 million in previously unrecognized revenue.

## DISCUSSION

This case reinforces that alignment is the primary driver of execution success. As illustrated in Figure 3, transformation does not occur through process improvements alone, but through the deliberate connection of alignment to execution.

In the initial state, the portfolio experienced significant misalignment across stakeholders, resulting in conflicting priorities, fragmented communication, and inconsistent direction across programs. This misalignment created inefficiencies that slowed execution and reduced overall delivery performance.

To address this challenge, targeted actions were implemented to simplify communication structures and strengthen leadership alignment. Executive alignment cadences, redesigned reporting, and clearly defined escalation pathways enabled stakeholders to operate with a shared understanding of priorities and objectives. These actions were not incremental improvements, but intentional interventions designed to correct systemic misalignment.

As alignment improved, execution outcomes followed. Delivery speed increased, decision-making became more efficient, and stakeholder confidence strengthened across the portfolio. In practice, what became clear was a direct relationship between alignment and execution performance.

The progression from challenge to action to outcome, as depicted in Figure 3, highlights a critical insight: alignment is not a passive condition, but an active capability that must be established and continuously reinforced. Organizations that invest in alignment enable more coordinated execution, while those that neglect it often struggle despite having capable teams and defined processes.

Beyond alignment, the findings also reinforce the importance of leadership in sustaining transformation. PMO leaders must operate through influence, ensuring that alignment is maintained across complex stakeholder environments. Governance and data play supporting roles, but it is leadership that ensures these mechanisms translate into consistent execution outcomes.

## Alignment and Execution

Transformation Happens When Alignment Meets Execution

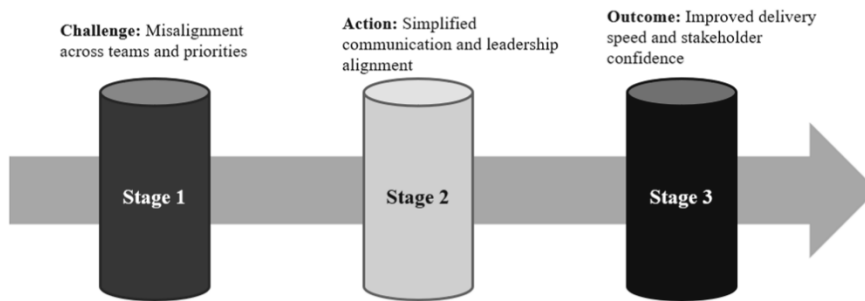


Figure 3: Alignment to Execution Flow

## LESSONS LEARNED AND PRACTICAL IMPLICATIONS

Several lessons emerged from this transformation that are especially relevant for PMO leaders working in complex environments. Alignment emerged as the primary driver of execution success. Without intentional and sustained alignment across stakeholders, even well-structured programs struggle to deliver consistent outcomes. Alignment must be actively established and continuously reinforced, particularly in environments characterized by competing priorities and distributed teams.

Equally important is the need for governance structures that enable rather than restrict performance. Traditional governance models often emphasize control and compliance, which can inadvertently slow decision-making and limit responsiveness. In contrast, governance designed to provide clarity, streamline escalation, and support timely decision-making enables more effective execution and improved delivery outcomes.

Data-driven decision-making also proved essential. Reporting that focuses solely on status provides limited value. Organizations must redesign reporting mechanisms to deliver forward-looking insights that highlight risks, dependencies, and decision points. This shift enables leadership to act proactively rather than reactively, improving both coordination and performance across programs.

Organizations seeking to replicate this model should prioritize stakeholder alignment early in the execution lifecycle, redesign reporting to support insight and decision-making, and establish governance structures that facilitate performance.

Investment in leadership capability within the PMO is essential, as transformation is driven not only by process, but by people. Leadership remains the sustaining force behind alignment, coordination, and execution, particularly in environments where influence and collaboration are required to achieve results.

## CONCLUSION

The evolution of the PMO into a strategic function is essential for organizations operating in complex and rapidly changing environments. As shown through this case, aligning vision with execution and focusing on measurable value enables PMOs to move beyond traditional oversight roles and directly contribute to organizational performance.

By adopting a Strategic PMO model grounded in alignment, execution, and value, organizations can improve decision-making, enhance delivery outcomes, and strengthen stakeholder confidence. This type of transformation allows the PMO to move beyond passive reporting, but as an active enabler of coordination and performance across the enterprise.

When positioned correctly, the PMO becomes more than a governance function. It becomes a strategic driver of organizational success, capable of sustaining transformation and delivering meaningful impact across increasingly complex environments.

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## **The Discipline of Execution: Applying Project Management to Turn Ideas into Measurable Outcomes**

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### **ABSTRACT**

Project management is often associated with large-scale, complex initiatives, yet its principles are equally valuable when applied to small, non-traditional efforts. This paper explores how foundational project management practices can be used to transform early-stage ideas into structured, executable outcomes. Using a real-world case study, Adventure Builders Lab, this paper demonstrates how a loosely defined concept evolved into a structured, revenue-generating initiative over a twelve-month period. The analysis highlights how the absence of structure contributes to execution failure, and how simple, disciplined application of project management processes creates clarity, alignment, and measurable progress. Key focus areas include initiation, planning, execution, monitoring, and risk management, along with common breakdown points such as misalignment, lack of ownership, and shifting priorities. The findings reinforce that project management is not a constraint on creativity, but a mechanism that enables ideas to move forward consistently and effectively across a variety of contexts.

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### **1. INTRODUCTION**

Across industries and environments, a consistent challenge emerges: ideas fail to translate into execution. This is not typically due to a lack of creativity or capability, but rather a lack of structure. Ideas remain conceptual, work begins without defined scope or sequencing, and progress becomes difficult to measure in the absence of milestones or success criteria.

This gap persists across industries, experience levels, and project scales, reinforcing that execution challenges are not isolated to complexity, but rooted in the absence of structure. Without structure, effort becomes reactive, alignment is inconsistent, and momentum is lost over time.

Project management addresses this challenge by introducing clarity, sequence, and accountability. While often perceived as a discipline reserved for large or complex efforts, its core principles are scalable and applicable across contexts. This paper explores how those principles can be applied to non-traditional initiatives to drive meaningful outcomes.

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### **2. CASE STUDY: ADVENTURE BUILDERS LAB**

To illustrate the practical application of project management, this paper examines Adventure Builders Lab, an initiative launched by a nine-year-old founder. The project began as an open-ended idea centered on creativity, with no defined structure, deliverables, or business model.

Over a twelve-month period, the initiative evolved into a structured operation with defined offerings, measurable outputs, and multiple revenue streams. The significance of this case is not the scale of the project, but the demonstration that project management principles are universally applicable.

This case provides a clear example of how structure can be introduced incrementally, enabling consistent progress while preserving creativity.

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### **3. PROJECT INITIATION: ESTABLISHING ALIGNMENT**

Every project begins with alignment. In the early stages of Adventure Builders Lab, this required defining three key elements:

- The objective: What is being built and why it matters
- Stakeholders: Who is involved and what they expect
- Success criteria: What constitutes completion

The project charter served as a foundational tool to document these elements. Rather than functioning as a formal artifact alone, it provided clarity and alignment across participants.

Without this step, the initiative would have remained loosely defined, increasing the likelihood of misalignment and stalled execution.

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### **4. PLANNING: TRANSFORMING IDEAS INTO STRUCTURE**

Planning represents the transition from concept to execution. In many cases, planning is avoided due to the perception that it slows progress. In practice, it reduces inefficiencies and prevents rework.

Within this case, planning included:

- A simplified work breakdown structure to organize tasks
- Milestones to define progress checkpoints
- Basic resource identification to understand constraints
- Initial budget considerations to support decision-making

These elements created a structured pathway forward. Instead of reacting to ideas as they emerged, the project progressed through intentional sequencing.

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### **5. SCOPE DEFINITION: CREATING FOCUS**

The initial concept for the project was broad and undefined, described simply as “building cool things.” While creative, this lack of definition limited execution.

Scope definition transformed this idea into:

- Structured product offerings
- Clear boundaries for effort
- Repeatable outputs

By narrowing focus, the project shifted from scattered activity to targeted execution. This step was essential in converting creativity into tangible outcomes.

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## **6. EXECUTION: BUILDING CONSISTENCY**

Execution followed a repeatable cycle:

- Plan
- Build
- Test
- Learn
- Repeat

This approach emphasized consistency over intensity. Weekly goals were established to maintain momentum, and rapid prototyping allowed ideas to be tested quickly.

Feedback loops enabled continuous refinement based on real input. This iterative model reduced risk and allowed the project to evolve dynamically while maintaining forward progress.

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## **7. MONITORING AND CONTROL: MAINTAINING ALIGNMENT**

Monitoring ensured that execution remained aligned with objectives. Rather than relying on complex systems, simple metrics were used:

- Cost, time, and output tracking
- Demand and engagement indicators

These metrics supported early identification of issues and enabled timely adjustments. Without monitoring, small misalignments could compound into larger challenges.

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## **8. RISK MANAGEMENT: RESPONDING TO REALITY**

As the project evolved, several risks emerged:

- Scope expansion beyond available capacity
- Limited resources, including time and tools
- Loss of focus due to competing priorities

- Sustainability challenges over time

These risks were not treated as failures, but as signals. Mitigation strategies included simplifying scope, reinforcing boundaries, and maintaining structured cadence.

The ability to respond to these risks was critical in sustaining progress.

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## 9. OUTCOMES

After twelve months, the project achieved:

- Multiple revenue streams
- Defined and structured offerings
- Measurable performance indicators
- Embedded learning outcomes

This model provides a structured approach that can be adapted and applied across initiatives of varying scale and complexity.

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## 10. LESSONS LEARNED

Several key insights emerged from this case:

- Structure supports creativity rather than limiting it
- Small initiatives require the same level of discipline as larger ones
- Execution is the primary driver of value creation
- Project management is transferable across environments

These findings reinforce that project management is not defined by scale, but by its ability to create clarity and enable consistent progress.

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## 11. CONCLUSION

Project management is often perceived as complex, yet its value lies in the consistent application of simple, structured practices. This case demonstrates that even simple frameworks, when applied intentionally, can produce meaningful and measurable outcomes.

The discipline of execution bridges the gap between ideas and results. By introducing alignment, structure, and accountability, project management enables initiatives of any size to move forward effectively.

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# Wide Angle Agile: A Compliance-Integrated Approach to Regulated Product Development

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## ABSTRACT

Wide Angle Agile (WAA) isn't just another framework; it's a necessary pivot for project management within the rigid constraints of medical device regulation. While standard Agile can stumble when faced with International Organization for Standardization (ISO) standards, WAA embeds compliance and risk management directly into the sprint cycle. This paper examines a hardware development case study to demonstrate that "broad-lens" iteration doesn't just check boxes--it actually speeds up the product pipeline by preventing the typical end-of-project documentation crisis.

## INTRODUCTION

Software teams have long enjoyed the luxury of moving fast and breaking things, but in medical device development that mindset is a liability. The industry deals with firm deadlines and uncompromising regulatory gatekeepers. The traditional friction point is well-known: engineers sprint through development, only to hit a wall of documentation and risk-filing at the eleventh hour. Wide Angle Agile (WAA) fundamentally changes this internal focus. By pulling regulatory checkpoints into the daily iterative flow, WAA stops treating compliance as a post-script. It creates guardrails that allow for hardware flexibility without sacrificing the documentation necessary for a safe, market-ready product.

## BACKGROUND

The project began as a hardware development workstream with a high-stakes goal: perform a series of pre-clinical studies to de-risk the eventual design down selection and verification and validation effort. In this project, requirements were not well defined at project initiation and therefore it was recognized a stage-gate Waterfall (Royce, 1970) approach would be suboptimal. Instead, we began with design specifications that were rather vague and developing, and thus constantly shifting. This resulted in a massive friction point: how do you stay agile when your deadline--a locked-in study date with a team of traveling resources--is completely immovable?

Our cross-functional group made up of engineers, regulatory leads, and clinical staff hit the classic wall of medical device development. We found an unavoidable tension between the

discipline of ISO 13485 (ISO, 2016) and the practical need to iterate. Engineering needed space to explore, but regulatory had to protect traceability and patient safety without compromise.

We leaned into the Agile Manifesto (Beck et al., 2001) to help us determine a path forward. It didn't take long to see that off-the-shelf Agile frameworks are built with software in mind, and they don't always translate well to hardware projects in regulated industries. We needed to lean on hybrid frameworks which ultimately led to the development of Wide Angle Agile (WAA). WAA goes beyond efficiency—it's a hybrid model that brings compliance, risk management, and iterative design together under one wide-angle lens. By making compliance part of the routine, not a separate track, we maintained rapid cycles while protecting the integrity of a regulated product.

## **PROCESS**

We started by putting the team through Agile basics training to get everyone on the same page before changing our actual workflow. The first real change was a tactical one: we killed the standard hour-long weekly "all-hands" meeting and replaced it with two thirty-minute sessions. We limited these to a smaller, more specialized group to mimic a standup format. This move was all about faster decisions and more focused conversations. We tracked everything in shared OneNote files so the evolution of the format remained transparent to everyone involved.

The first few weeks were mostly trial and error. We played around with dashboards, charts, and Kanban boards, but we didn't force it. Staying true to the Agile Manifesto, we prioritized what actually worked over sticking to a rigid plan. That flexibility hit our comms, too—if a live meeting felt like a waste of time, we just swapped it for a quick update in the Teams group chat and kept moving.

Once the foundation was set, we used the first sprint to map out the core workstreams for the pre-clinical effort. These workstreams became our backlog. Interestingly, while we started with Kanban, the team eventually ditched it for an action table organized by workstream. It simply worked better for us. This table became the source of truth for deadlines and task ownership. At the end of every sprint, we held a retrospective so we could identify any friction and course correct in the weeks ahead.

The real challenge in our new approach was navigating how to integrate our ISO 13485-compliant quality management system (QMS). We could not let speed negatively impact our regulatory obligations. We remained compliant by using existing QMS artifacts to document our design changes as they happened. In practice, this meant logging updates in controlled documents and refreshing risk analyses in real-time. We maintained full traceability even when the requirements were somewhat fluid.

This hybrid framework was WAA in the real world: folding compliance and risk directly into the product development rhythm. Our program proved that you don't have to sacrifice regulatory rigor for speed. By weaving ISO 13485 requirements into the framework, we kept the team's innovation fast without compromising our design controls.

This approach was more than just a change in rules; it was a shift in how the team approached problem solving. The results extended beyond product development into cultural changes: we ended up with a group of Agile champions that were always looking for opportunities to improve our processes rather than just following a preset process. As the results spoke for themselves, skepticism about changing our way of working faded across the organization. Now, we're seeing other teams pick up the WAA model to see if they can catch the same lightning in a bottle.

## **RESULTS**

The WAA framework delivered exactly what we needed: two pre-clinical studies completed right on schedule. This was more than just a win for the project; it proved to the team and the business that a hybrid model can handle the pressure of rapid iteration against hard deadlines without sacrificing regulatory rigor. Arguably more important than the data from the studies, we experienced a massive shift in team dynamics. Cross functional collaboration tightened, we effectively de-risked our next round of design and development, and we left the process with a core group of Agile champions ready to lead other teams in the organization.

Despite our wins, it wasn't a roaring success from the start. We experienced some friction early on, specifically with our tracking tools. We learned the hard way that while Kanban boards look good for visibility, they didn't have the teeth our team required for tracking workstreams in a regulated environment. Switching to structured action tables was the fix we needed. That being said, this sort of lesson is why one of the main components to the preliminary Agile basics training we conducted focused on adaptability. By reinforcing this openness to change early and often, the team did not hesitate much to speak up about what was working for them, what wasn't, and what they would like to try next. We made sure to give these pivots the trying change they deserved before abandoning them if the team felt they were not productive.

We also had to stay hyper-vigilant about the balance between moving fast and staying audit ready. That balance becomes a constant tug-of-war between momentum and compliance. One of the biggest takeaways on this front was how we managed communication. We realized that forcing every update into a live meeting was causing unnecessary meeting fatigue. Moving to written updates as the team felt fit through Teams gave everyone more heads-down time to work without losing alignment. These are more than just small shifts in process and execution; they are the blueprint for how we can look at applying the WAA rigor to future projects.

## DISCUSSION

Applying WAA in this program gave us a clear view of both what agility can offer and where it naturally runs into limits in a regulated setting. The framework helped the team move faster, communicate better, and keep the pre-clinical studies on track. But we also had to be deliberate about how much flexibility we allowed. ISO 13485 doesn't ease up on documentation, risk, or traceability just because the team is iterating, and we couldn't treat those expectations as optional. That push-and-pull made it obvious that Agile practices can't be copied straight from software and dropped into regulated work. They have to be shaped to fit the environment. WAA reinforces that agility isn't about loosening rigor—it's about broadening the view so compliance, risk, and stakeholder clarity stay woven into every cycle of work.

Wide Angle Agile reframes core priorities for regulated environments, inspired by the Agile Manifesto:

1. Integrated compliance over end-of-project remediation  
*Compliance is not a phase or a checkpoint—it is part of the daily workflow.*
2. Continuous risk management over delayed risk documentation  
*Risks are identified, assessed, and mitigated as designs evolve, not after they are finalized.*
3. Stakeholder-ready documentation over sprint-only outputs  
*Documentation exists to support decisions, audits, and patient safety—not just velocity.*
4. Adaptable structure over rigid frameworks  
*Processes, tools, and ceremonies evolve based on what works for a unique team in a regulated context.*
5. Cross-functional ownership over functional handoffs  
*Engineering, regulatory, and clinical partners share responsibility for outcomes from day one.*
6. Audit readiness over audit panic  
*Traceability and design controls are maintained continuously, not reconstructed under pressure.*
7. Learning-driven iteration over blind speed  
*Iteration is purposeful, informed by data, risk, and regulatory constraints—not motion for motion's sake.*

Both sides matter—but in regulated product development, the left is often the constraint that determines success. *This framing is inspired by the Agile Manifesto (Beck et al., 2001), adapted for highly regulated, hardware-driven product development.*

## FUTURE DIRECTIONS

The experience of using WAA during pre-clinical study preparation suggests that the approach could be useful in other areas of regulated product development as well. A natural next step is to explore how it performs in verification and validation activities, where documentation expectations are even higher. There is also potential value in applying the framework across multiple programs at once, which would test how well it scales while still supporting consistency and compliance. As more organizations in highly regulated environments look for ways to innovate quickly without sacrificing regulatory discipline, WAA offers a practical model for doing both in complex, highly regulated settings.

## CONCLUSION

Wide Angle Agile offers a practical way to bring agility into regulated product development without losing sight of compliance. By building risk management, documentation, and regulatory awareness into every cycle of work, teams can move quickly while still maintaining quality. This case study shows that agility and compliance aren't opposing forces; with the right structure, they can actually reinforce one another. The on-time completion of two pre-clinical studies is one example of what that balance can deliver, and it hints at the broader potential of WAA across regulated industries.

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