

A CASE STUDY FOR A MANAGED  
ENTERPRISE PMO AS A SERVICE:  
Ideas, Approvals, Capacity, and  
Demands

Satinder Baweja  
Lori Vidak



# Presenters



Satinder Baweja

- Founder & CEO of Milestone Consultants.
- 25+ years of experience in Program & Project Management.
- Masters in Engineering from Texas A & M



Lori Vidak

- Research Consultant for Milestone Consultants
- 30 years Small Business Management
- Writer & Group Fitness Instructor



## Agenda

- +PMO as a service vs. PMO as an organization
- +Internal vs. External PMO
- +Scope of Services offered & Importance
- +Establishing the Predominant Principles
- +Structuring and Building the PMO
- +Summary

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What we hope you can take away –

- This is not necessarily about PMOaaS, but more about PMO transformation to provide value
- To provide value, identify the gaps in enterprise delivery and the gap that best aligns with your PMO competencies
- Executive suite sponsorship is critical
- Define the principles that guide your decisions and operations.
- Be grounded in Agility

## PMO as a service vs. PMO as an organization

The use and value of PMOs has improved over the past few decades. Yet, multiple challenges still prove too difficult for most PMOs to improve significantly. Thus, organizations need to make PMO changes to solve them.

- What is an *as a service* offering?
- How is it different from a consulting or contract labor offering?
- How does it provide the agility that a rigid legacy organization cannot?



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PMO's are still struggling to make headway in improving challenges, such as:

- Resource Management
- Change Resistance
- Strategy Shortfalls
- Prioritization
- & Project Manager Shortages

# What is an as a service offering?

## Defined

A means of delivering value to customers by facilitating outcomes customers want without the ownership of specific costs and risks<sup>1</sup>.

## At its core

- + Scalability based on volume and needs.
- + Re-assignable resources during the scale-down times.
- + Function delivery that the organizations utilizing it consider valuable.

1. Jack Probst, ANATOMY OF A SERVICE A Practical Guide To Defining IT Services, 2009

Service offerings have been around for decades, if not centuries. Payroll, infrastructure, and applications are a few examples [3]

Providing a service. NOT performing a function.

Transform how the organization talks about the PMO. Talk about PMO being a barrier to success (add a field to the report saga)

A service offering embraces the concept of Value. But how does an organization measure value? Understand the executive expectations. BUT also educate executives on how the service will deliver value. (Benefits realization)

## How is it different from a consulting or contract labor offering?

### **Consulting or Contract Labor**

- + A consulting firm helps solve complex program or project delivery problems using specific expertise.
- + A contract labor service provides staffing solutions, possibly onsite labor and day-to-day operations management billed based on employee hours.

### **PMOaaS**

- + The service offers standard and specialized PMO functions to its subscribers.
- + Consults and fills talent gaps.
- + Can range from a few select functions, such as portfolio management or center of excellence, to a comprehensive managed ePMO.
- + Scalable

## How does it provide the agility that a rigid legacy organization cannot?

### Living vs Legacy Organizations<sup>1</sup>

- + The Living is dynamic—designed to continually identify and perform value-adding functions, restructuring accordingly.
- + The Legacy becomes rigid. Its functions fit its existing structure to reinforce itself yet loses relevance.

### PMOaaS or mePMO

- + The service stays dynamic since it's customized to an organization's current and future needs.
- + The service can diminish or expand as needed. Adaptability creates agility.
- + The client focuses on strategy. The PMOaaS aligns PM functions & projects to that strategy.

Schumacker, Joe, "Living vs. Legacy Organizations", 2013; <http://joeschumacker.com/2013/05/24/living-vs-legacy-organizations/>

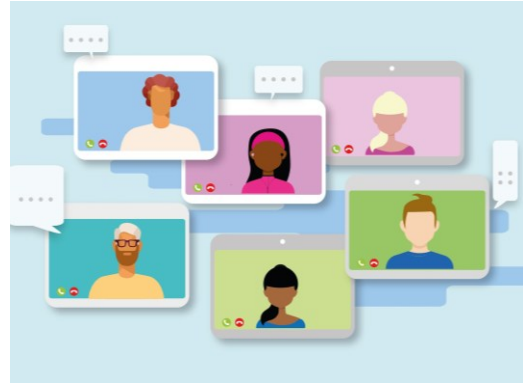
Satinder slightly disagrees with Schumaker's definition. The PMOaaS does not perform functions; it delivers a service. You perform functions to deliver a value. It may seem like semantics, but more importantly, it's a shift in how the PMO thinks and operates

# Internal vs. External PMO

The internal PMO is permanent; consists of an in-house team<sup>1</sup>.

The external PMO is temporarily or permanently managed by an off-site service provider.

- Does a PMOaaS mean the service provider is an external entity?
- Could it be a corporate entity?
- Can a PMOaaS be an internal and external blend?



<sup>1</sup> Martins, Julia, "What is a project management office (PMO)?," 2022; <https://asana.com/resources/pmo-project-management-office>  
<sup>2</sup> Hall, Don, Project Management Office (PMO) Meaning, 2023; <https://project-management.com/pmo-meaning/>

Another view of the difference between an internal and an external PMO is its audience.

A PMO that is concerned primarily with staff can be considered internal. One focused on interactions with key stakeholders is external.

Therefore, an externally managed PMO's audience could be external or internal. And the same holds true for an in-house PMO. Its audience could be staff or stakeholders.

So, your PMO, or a PMOaaS, needs to know its main audience, whether it is internally or externally managed.

## Does a PMOaaS mean the service provider is an external entity?

Mostly, the PMOaaS is offered & managed by an external provider.

- + The service provider is experienced and highly proficient with portfolio, program, and project management.

However, the corporation could manage the PMOaaS.

- + The service provider might oversee the PMOaaS for an agreed-upon time, then turn the management over to the organization

## Could it be a corporate entity?

### Yes, with sizable corporations.

- + The core PMO team is minimal to support day-to-day project management operations.

### Must have a service-oriented design.

- + It expands capabilities and its team as needed
- + It may include a rotating crew of experts.

One complaint about PMOs is that they often become overly bureaucratic and create more burdens for project management than they provide in return.

3 small initiatives

- PMO requests the forms to be filled out by the business units
- Forms are filled out. The projects individually do not meet the ROI criteria
- Combine the projects. Suddenly, it meets the criteria. Get approved by the funding oversight board

The execution team would like to see the project broken into 3 independent units. PMO wants the approval process to start over if we do that.

WHO is at fault??

## Can a PMOaaS be an internal and external blend?

### **External Service Provider**

Performs Value-added Project Management Functions, such as:

- + Enterprise Program and Project Management
- + Strategy Alignment
- + Project Portfolio Management
- + Process and Governance

### **Internal to Organization**

Some functions must remain the responsibility of the funding organization

- + Strategy
- + Chairing the steering committee
- + Chairing the governance committee
- + Chairing (OCM)

**The internal-external blended service may share PMO and project management functions.**

## Scope of Services & Why They are Critical

Within the service scope, there may be temporary services. Others are interdependent and essential to improving project management performance. PMOs that do not do one or more of these or are weak in performing any of them hamper the organization's ability to achieve its strategic objectives.

- Enterprise Program and Project Management
- Strategy Alignment
- Project Portfolio Management
- Governance
- OCM-close collaboration



## Enterprise Program & Project Management

- + EPM connects organizational goals & objectives with current & future projects & programs, organizing them within portfolios to manage their interdependent elements for better delivery<sup>1</sup>.
- + EPM requires senior leadership & stakeholder involvement across functional business units.

Enterprise-wide project management offices (EPMOs) are strategic-level PMOs that perform EPM. Their scope of functions includes:

- **governance**
- **structure**
- **strategy alignment**
- **IT**
- **people management regarding projects**
- **portfolio and program management**

<sup>1</sup> Alexander, Moira, "What is an EPMO: The organizational key to project success," 2016 <https://www.cio.com/article/221733/epmo-enterprise-project-management-office-explained.html>

## Enterprise Program and Project Management

The figure below represents the functions of the governing bodies involved in the project management process of the organization.

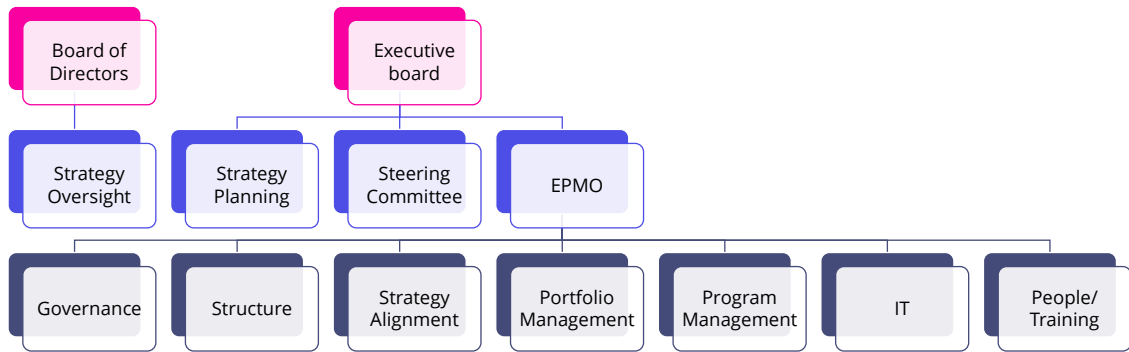


Figure 1 - Governance Structure & Functions

The executive board is the governing board of an organization [28]. It is part of the board of directors, which together provides strategic direction and decision-making for the organization.

We are discussing EPM. What if your PMO is a departmental PMO? How does the list of services change?

Some of this is aspirational.

Some is what we know works

Which C-level person should the EPMP be under?

## Strategy Alignment

Strategy alignment is an important reason why PMO senior leaders & senior PM's must understand corporate strategy & goals.

As part of the alignment process, the PMO must:

- + Manage the project intake process
- + Ensure a business case exists for each project in the queue & that one-page business cases are okay for smaller projects (Avoids becoming bureaucratic)
- + Allow for functional groups to be involved with the project selection process based on both quantitative & qualitative factors
- + Have a scoring system based on project delivery alignment with corporate strategy.

PMI, Project Management Institute, "Success in Disruptive Times," 2018, <https://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2018.pdf>

Why do you think Strategy Alignment is important? Does your organization have a published vision?

How do you think it delivers value?

Not in what you approve but what you don't.

Do you agree that intake management is important to PMO success? What do you consider intake?

Ideation to Project Chartered.

## Project Portfolio Management (PPM)

### PPM LIFECYCLES OR COMPONENTS

Three goals critical to PPM's mission to add value and improve your organization's ROI <sup>1</sup>:

- **Selecting the right project mix**

Organizations are resource-limited. Chosen projects should leverage those resources to give the best value to stakeholders.

- **Optimizing scope**

Cross-functionally align projects. Limit changes to those necessary for maximizing the improvements that meet corporate goals.

- **Quickly executing correctly sequenced projects**

The PPM team & the organization must stay within project capacity. The team must monitor project execution, promptly recognize out-of-control situations, and immediately take action to resolve them.

<sup>1</sup> American Management Association, THE AMA HANDBOOK OF PROJECT KNOWLEDGE, FOURTH EDITION, 2014, New York, AMACOM, American Management Association

Project Portfolio Management optimizes alignment of project strategies.

When is the portfolio optimized? (Annually, Quarterly, Dynamically)

How do you handle Pet Projects?

## Project Portfolio Management (PPM)

THE PROCESSES INVOLVED IN ACCOMPLISHING THESE THREE PPM ACTIVITIES ARE PRESENTED IN THE FIGURE BELOW:

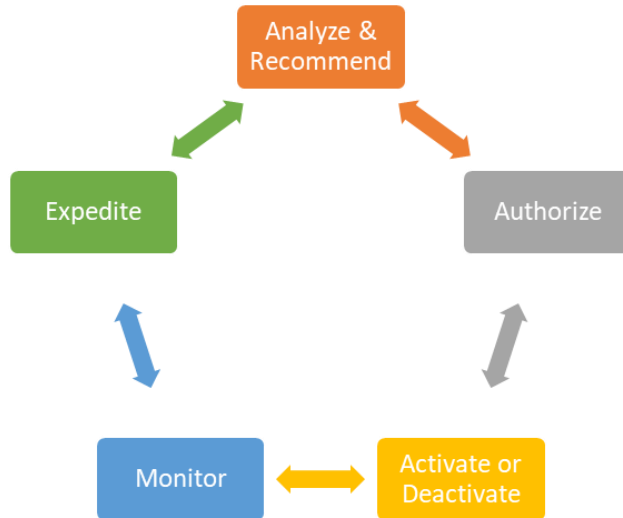


Figure 2 - PPM Processes

These activities are not sequential, even from the beginning of the portfolio and at the proposal stage. They are interdependent upon analysis and monitoring, which are also dependent upon the others.

## Process and Governance

**THE PMOAAS GOVERNANCE COMPETENCY INVOLVES THE ACTIVITIES THAT SET IT AS A BUSINESS FUNCTION WITH THE CENTRALIZED AUTHORITY TO EXECUTE ITS SERVICE RESPONSIBILITIES.**

Governance includes:

- + Establishing accountability to the PMO'S leadership hierarchy
- + Independent authority to govern without a heavy-handed bureaucratic approach
- + Ensuring that the PMO administers business and technical guidance across the project environment.
- + Managing authority for direct interactions with department heads and business managers
- + Developing and providing relevant company project management best practice guidance

1 Gerard M Hill, The Complete Project Management Office Handbook, 2004, Boca Raton, ESI International Inc, Auerbach, CRC Press LLC

Governance is not bureaucracy.

Governance includes;

- Establishing Accountability
- Authority to govern without a heavy-handed approach
- Providing Business and technical guidance
- Managing direct interactions with department heads and managers
- Establishing relevant best practices

## Process and Governance

Best practices are the most efficient and effective established routines of procedures that make up project management processes.

The PMOaaS sets them as standards for:

- + Metrics
- + Content
- + Auditing
- + Team development
- + Knowledge management

- + Mentoring
- + Planning
- + Project recovery
- + Resource management
- + IT utilization

The PMO sets the standards for these needed practices.

## Process and Governance

As important as governance is to organized, consistently successful project delivery, it can be more detrimental than helpful.

There are four rules to follow that will keep it sound.

1. Keep governance for every kind of project, even the small ones.
2. Keep it lite for small projects.
3. Keep it flexible & not bureaucratic.
4. Keep it as simple as possible.

The mePMO is the perfect solution, scaling up & down while maintaining a primary core team to support all projects. As new project needs arise, whether large, small, or in between, it spends less time assessing new resource impacts since it already tracks current resources.

## Is governance oversight?

### Basic principles:

- Accountability – with responsibility will come accountability
- Leadership – set the tone
- Integrity
- Stewardship – managing the organization's resources to deliver the best value
- Transparency.

Does any organization work on the Gated Model?

## Establishing the Predominant Principles- What drives the mePMO

Principles guide change, but the industry standard principles seem insufficient to the task for the average PMO and project management teams. They are weak on strategy.

- Principles of War <sup>2</sup>
- Agility
- NexGen Concepts



<sup>1</sup> Satinder Baweja and Lori Vidak, OMG-This is War! Why We Adapted War Principles for PMO Use, 2022  
<sup>2</sup> Satinder Baweja and Lori Vidak, Nine Principles of War: A Bird's Eye View, 2022

# Principles of War <sup>1</sup>

## + **Objective**

Direct every military operation toward a clearly defined, decisive, and attainable objective.

A mission statement is vital to building and managing any PMO.

## + **Offensive**

Seize, retain, and exploit the initiative.

From the portfolio to the program & project, be proactive, not reactive.

## + **Mass**

Concentrate the effects of overwhelming combat power at the decisive place and time.

Apply the right people & other resources at strategic times throughout each phase of projects in the portfolio.

<sup>1</sup> Satinder Baweja and Lori Vidak, Nine Principles of War: A Bird's Eye View, 2022

Last year, our Symposium presentation focused on applying the principles of war to the PMO. We are convinced that these principles make a difference across all things PMO-related, so we have included a short, sweet summary in today's presentation.

## Principles of War <sup>1</sup>

### + Economy of Force

Employ all combat power the most effective way possible; allot minimal combat power to secondary efforts. Prioritize operations or strategic initiatives to prevent spreading resources thin.

Put non-essential tasks aside to bring the economy of force to critical success factors.

### + Maneuver

Place the enemy in a position of disadvantage through the flexible application of fire power.

Equip & prepare the PMO team to maneuver its resources for top efficiency & performance.

### + Unity of Command

For every objective, ensure unity of effort under one responsible commander.

Only one person gives orders for any action or activity to an individual.

1 Satinder Baweja and Lori Vidak, Nine Principles of War: A Bird's Eye View, 2022

The Unity of Command principle requires the following:

- The PMO leader (the PMO commander) needs the authority to carry out the PMO mission and all the responsibilities and activities it entails.
- Project managers (the project commanders) need autonomy to achieve their goals.
- The Unity of Command requires effective, efficient communications, thus a communication plan. The plan specifies who, when, what, where, and how to communicate project and program management concerns, internally and externally.

## Principles of War <sup>1</sup>

### + Security

Never permit the enemy to gain an unexpected advantage.

Risk, change, and transition management are opportunities to be ready for challenges before they occur.

### + Surprise

Strike at a time, a place, or in a manner for which the enemy is not prepared.

Be proactive in understanding executive leadership & stakeholder viewpoints, meeting their needs before they know they need it. Also, surprise is innovation.

### + Simplicity

Prepare clear, uncomplicated plans and clear, concise orders to ensure thorough understanding.

Provide clear & concise communications, striving for minimalistic governance & direction.

<sup>1</sup> Satinder Baweja and Lori Vidak, Nine Principles of War: A Bird's Eye View, 2022

**Security** — For instance, risk analysis forecasts the worst (or best) case scenarios of risks and solutions, so that if they occur, the team is ready to act with the solution.

**Surprise** — We considered the element of surprise in the positive application of pleasant surprises. Another application of surprise is facilitating teamwork by providing opportunities, timely feedback, and support, while encouraging an atmosphere of innovation. Team members' ideas may be the source of the next solution to recurring situations, new tools, processes, or training.

**Simplicity** — The PMOaaS strives to use just enough to drive the project management machine toward noticeable progress.

**Who is the enemy on projects** – Uncertainty, Change, Risk

**Surprise** – Here, our interpretation is a bit of a stretch, using it in a way that would surprise my stakeholders.





*“In the Army, we are taught to manage expectations. It’s important to understand what you are capable of, both as an individual and as a group, and to plan accordingly. Overextending because of unrealistic objectives can be deadly for a commander and his troops.”*

*Luis Carlos Montalvan <sup>1</sup>*



<sup>1</sup> L.C. B.W. Montalvan, Until Tuesday: A Wounded Warrior and the Golden Retriever Who Saved Him

## Agility

A Principle or Characteristic?

Agility is often understood to be an independent principle, but it is, in fact, a characteristic.

- + Often confused with AGILE, a methodology made up of a set of principles.
- + Agility is a characteristic produced by principles, skill, and experience.
- + In short, agility is adaptive, quick decision-making<sup>1</sup>.
- + Agility is a direct result of applying the nine war principles to the mePMO.

1 Satinder Baweja and Lori Vidak, Designing a PMO That Works – The Next Generation PMO, PMI EMEA Congress 2019

**Reaction to an event is faster than the ability of the event to create damage.**

# NexGen Concepts

## Concepts of Maturity

- + Full maturity first day
- + An ePMO or PMO are major league project management teams
- + The responsibilities at right are not steps to maturity
- + These activities are interdependent

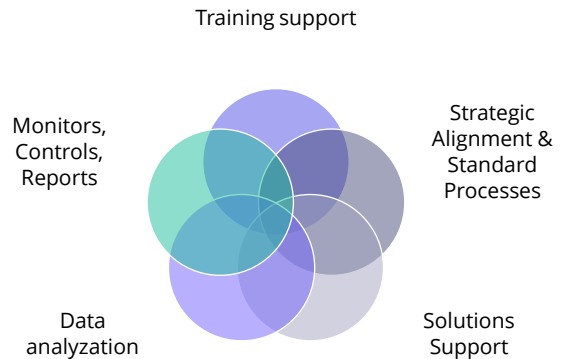


Figure 3 - Responsibility Interdependence

1 Satinder Baweja and Lori Vidak, Designing a PMO That Works – The Next Generation PMO, PMI EMEA Congress 2019

The NexGen concept embraces full maturity as a necessity from day one of operation. The management industry views these activity sets as operational steps that a PMO gradually adds to its scope as it and the organization master the prior steps. However, we consider this to be a reason why so many PMOs have failed.

The activities on this slide are interdependent, meaning the poor performance of one will affect the others.

The PMO is the major league within project management. You do not put minor league resources in leading roles within your PMO and expect major league performance. All leading positions within the PMO must be highly skilled, knowledgeable, and experienced in project, program, and portfolio management, project controls, and communications. The PMO also needs the tools to perform enterprise-level functions efficiently. Only then will it perform all services within its expected management scope at level 5 maturity.

Staffed with leaders who meet the NexGen (major league) criteria, the PMOaaS has an advantage over the standard PMO. The PMOaaS must have NexGen resources and capabilities; otherwise, it will not be able to mature your organization and its project management capabilities. Even if the service covers only a few select PMO or project management functions, the service team still utilizes them all, to some extent, knowing each affects the others.

Although expert leaders, consultants, and team members comprise the PMOaaS, the service utilizes less experienced or skilled resources to assist the leaders or manage less-complex projects or programs. When the service provider trains junior staff, it builds a pool of experts familiar with the PMOaaS's guiding principles and operations.

# Structuring and Building the PMO

Transitioning or putting together the PMOaaS does not happen in principle or theory. It needs:

- People
- Structure
- Tools



# Transitioning to a PMOaaS

Moving your organization to a PMOaaS model is a large-scale transition.

There are four basic steps<sup>1</sup>:

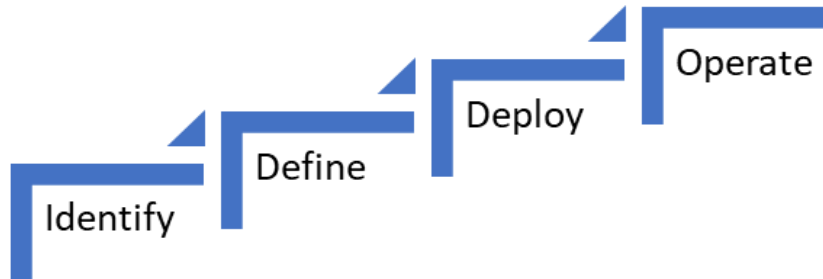


Figure 4 - Four PMOaaS Transition Steps

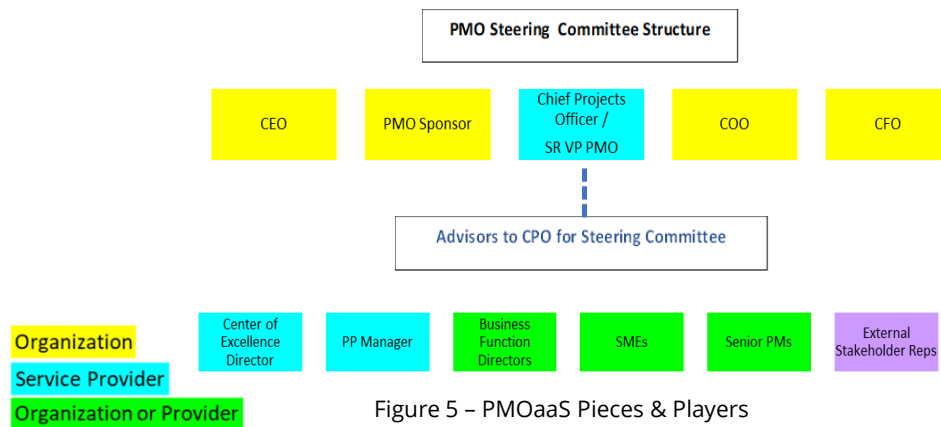
MI-GSO | PCUBED, "Your Guide to Establishing a PMOaaS," 2019, <https://www.migso-pcubed.com/blog/pmaas/moving-to-a-pmo-managed-service/>

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1. Identify the service requirements, setting relevant success metrics
2. Define the work or activities with the mobilization plan. Consultants work jointly with the existing resources during this learning phase
3. Deploy and use the service once you have standardized delivery, budget or pricing, set roles, and responsibilities.
4. Operate the day-to-day service, while continually looking and adjusting to improve and provide the most value.

## People

The true structure of any PMO is the people, filling leadership, technical, professional, and functional roles. The PMOaaS is fluid. All roles exist within it, but not necessarily singularly represented. Representation is determined by the scope of the mePMO service, capacity, and maturity level of your organization. The following diagrams represent PMOaaS pieces & players.



Why is the head of the PMO not a C-level executive?

Along with the EPMO leadership, the executive board is part of the PMO steering committee. This committee, through the CPO, should use the heads of cross-functional teams, SMEs, senior PMs, and stakeholder reps as advisors. At the very least, the CPO should consult with them on any issues to be brought before the Steering Committee.

The yellow roles display the organization's participation in the governance of the PMO, while the blue represents those of the service provider. The green shows the positions the organization or the service provider might fill.

# People

The ideal structure of the PMOaaS functions best at an enterprise PMO level, creating a partnership with executive leadership down through the organizational hierarchy. The chart below represents this leader partnership. This figure and the next also demonstrate the flexibility of the managed service organization.

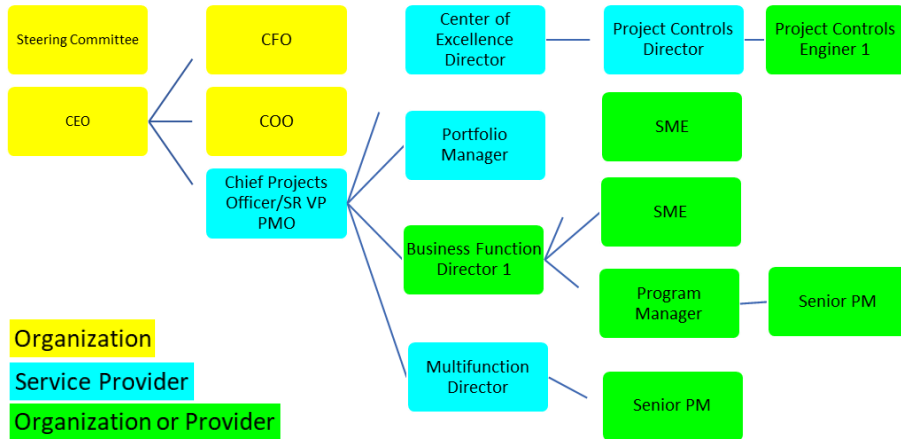


Figure 6 – PMOaaS Leadership Partnership & Hierarchy

## People

### Structuring Process Components for Flexibility

Keep the Core team interchangeable, thus rotatable.

- + Duality is appropriate for smaller organizations or until the initial PMOaaS must expand capacity. We do not recommend resources that perform more than two roles within the PMO.
- + Cross-training functional area and PMO personnel supports rotation for maximizing resources. The ability of the core team to be interchangeable comes in handy as an organization's project demands fluctuate.

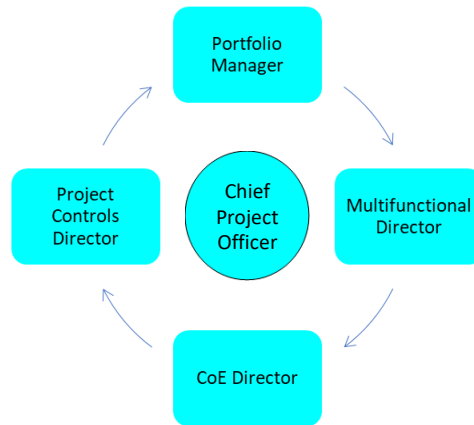


Figure 7 – Rotatable Core Team

The COE Director can perform dual roles, such as the project controls director or the portfolio manager.

The chief projects officer is stationed for stability but can also fill other core team roles.

# People

## Structuring Process Components for Flexibility

**Build the Center of Excellence (COE) as the skills/communications/data hub.**

The COE centralizes all communications and data, manages project controls, including scheduling and metrics, training, and standardizing methods and processes. The COE director could be the communications officer or need a communications officer to assist with communications operations.

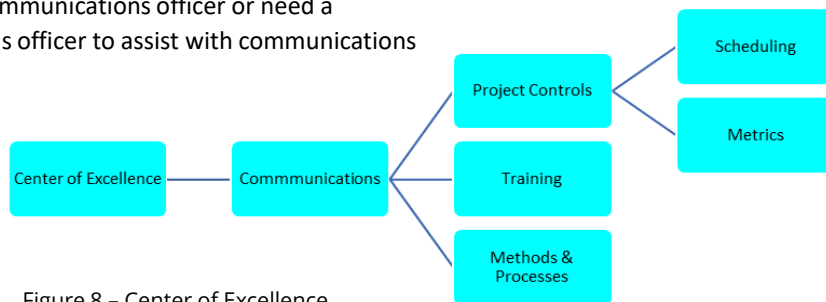


Figure 8 – Center of Excellence Functional Departments

Project controls, training, methods, and processes run directly through the communications center, which collects and manages all data.

The COE drives transparency and interdependent cooperation between leaders, project teams, and stakeholders.

# People

## Structuring Process Components for Flexibility

### Borrow from the functional area's people.

- + Project managers recruit temporary resources from the functional unit or units.
- + The business function director (BFD), who may become permanent in the PMO, can be assigned directly from within that functional unit.
- + PMs cooperate with the functional units, and the recruited team members report directly to the PMs.
- + The BFD will work with the Senior PM or PMs to designate SMEs for that functional unit's projects.

- Use functional unit resources.
- BFDs could be from that functional unit.
- Recruited resources report to the PMs
- The BFDs and Senior PMs cooperatively assign SMEs

## People

### Structuring Process Components for Flexibility

Let your organization concentrate on existing competencies as the PMOaaS fills in project management skills and capabilities gaps.

- + Depending on organizational goals, the PMOaaS may include resource training to improve skills and increase knowledge, enabling your team to take over more PMO responsibilities or completely manage the PMO.
- + If your company prefers an external PMO service provider, the PMOaaS expands its service scope as the business grows or needs to pull resources from project management personnel to fill resource shortages in other functions.
- + The service team works with your organization to periodically review where and when adjusting its service scope becomes necessary.

The value is in providing the skills and capabilities the organization needs to achieve its objectives.

## People

**Here is a quick review of the components of the structuring process.**

- + Keep the Core team interchangeable, thus rotatable.
- + Build the Center of Excellence (COE) as the skills/communications/data hub.
- + Borrow from the functional area's people.
- + Let your organization concentrate on existing competencies as the PMOaaS fills in project management skills and capabilities gaps.



People make up the structure, and they need the best tools to facilitate their responsibilities. Tools are critical to the PMO and the organization. In the case of the PMO, tools are built into software programs. So, we'll now take a closer look at software capabilities or tools.

## Tools

To stay abreast of all the programs and projects within the portfolios, your PMOaaS must use and integrate the right management software for your needs & business culture.

**The software must have certain capabilities or tools.**

- + Intake Management
- + PPM
- + Governance
- + Program and Project management
- + Collaboration
- + Dashboarding and Analysis
- + AI to automate certain features



The above tools are must-haves, but the PMO may need others for your organization.

The software is just as customized to your company as the PMOaaS offerings.

# SUMMARY

## Why “as a service?”



- + The PMOaaS’ core capabilities are program, portfolio, and project management.
- + The PMOaaS delivers business value using PMO processes for business success.
- + It focuses on business outcomes & provides a performance index that business executives value.
- + At the mePMO level, it creates a true partnership at every hierarchical level.
- + Its NexGen (highly skilled, knowledgeable, & experience) experts are competent to transform and perform all the needed PMO and project management functions. Their holistic observations & innovative ideas clarify project delivery situations, hastening resolution and project progress.

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Understanding how project management can deliver business success is critical to transforming into a service.

Delivering a service takes constant evaluation of value delivery, which requires understanding the business organization’s desired outcomes.

The PMOaaS offers advantages over establishing and maintaining a more traditional PMO, if the PMO's success is measured by business outcomes rather than by delivery methods and traditional project success measures such as on time and on budget.

## SUMMARY

### Why “as a service?”



- + The PMOaaS has a rotatable core team of experts.
- + It includes a center of excellence.
- + Borrows from the organization’s functional experts as needed.
- + Fills critical project, program, & portfolio management gaps.
- + It is cost effective.
- + It can reduce your organization’s need to expand hiring & staff overhead.
- + Integrating with your organization’s culture, it builds trust through collaboration, transparency, and support, & helps internal & external members work together.
- + The PMOaaS provides an open flow of communications & informs everyone of processes & roles.

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Moving from a functional organization to a service model is a significant transition.

Restructuring to allow your core leaders to focus on business outcomes and defining the success criteria is a critical first step.

Giving them the autonomy and responsibility to collaborate with other functional leaders allows them to implement further changes.

Thank You



Satinder Baweja



[sbaweja@milestone.us.com](mailto:sbaweja@milestone.us.com)



[www.milestone.us.com](http://www.milestone.us.com)