



Project  
Management  
Institute  
New Jersey

*2025 Symposium*

# *Tomorrow's Trends*

## *PMO of Tomorrow: Harnessing AI to Drive Business Outcomes*

May 5, 2025

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# The PMO of Tomorrow

## Harnessing AI to Drive Business Outcomes

Presented by:

Stephen Teebagy

Yesterday

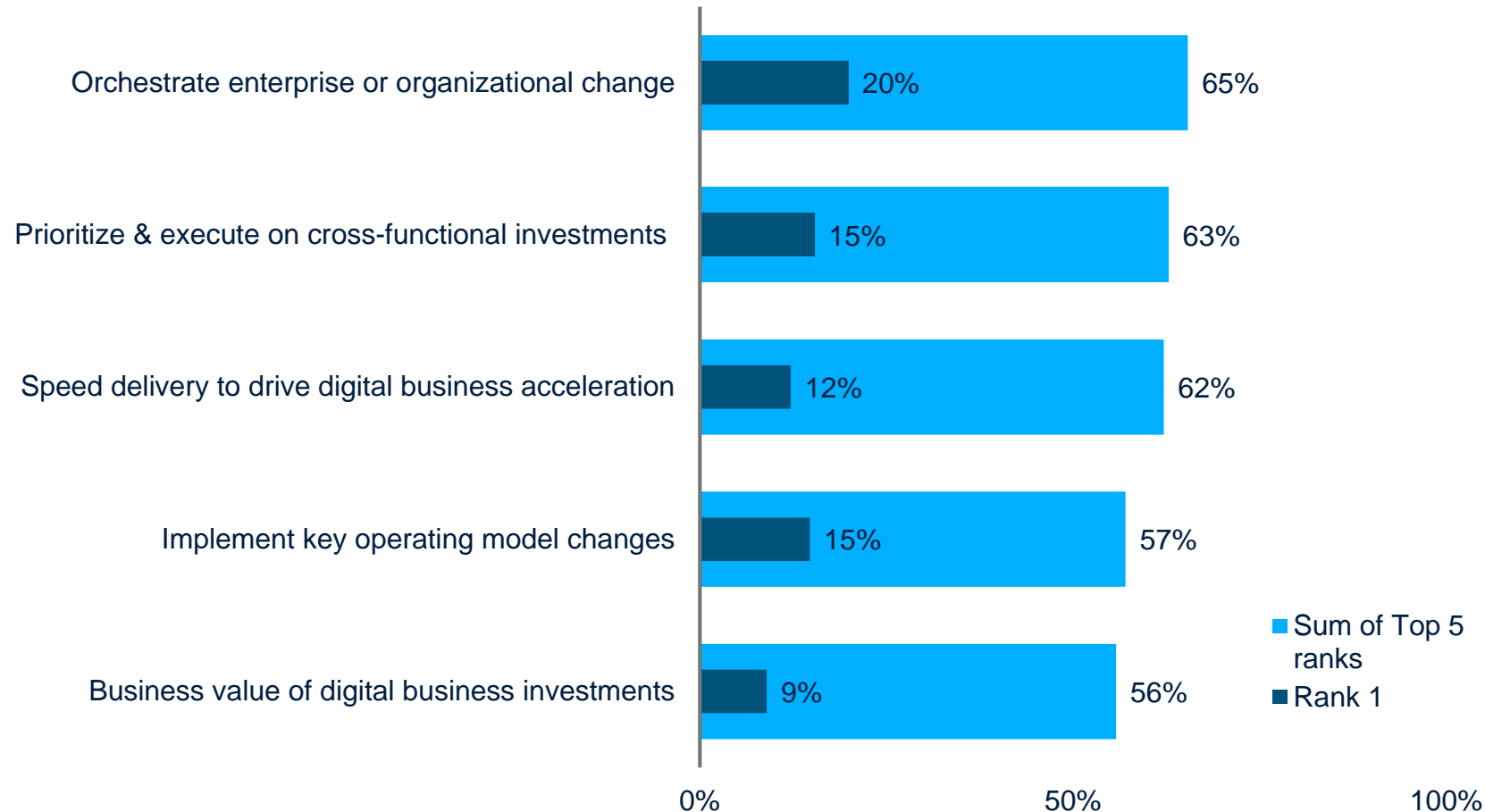
Today

Tomorrow

# Today's PMOs

... are facing challenges on multiple fronts in the **modern, competitive, and fast-paced digital age**

# Top Ranked Challenges to Digital Business Success



**Orchestrating enterprise change, portfolio prioritization and speed to deliver value are common concerns to executives and senior leadership across the board.**

n = 156 Digital Business Leaders

Question: What are the challenges encountered by business leaders in driving digital business success?

Source: Gartner's Digital Business Leaders Survey on EPMOs

May 5, 2025

# Why the Shift?

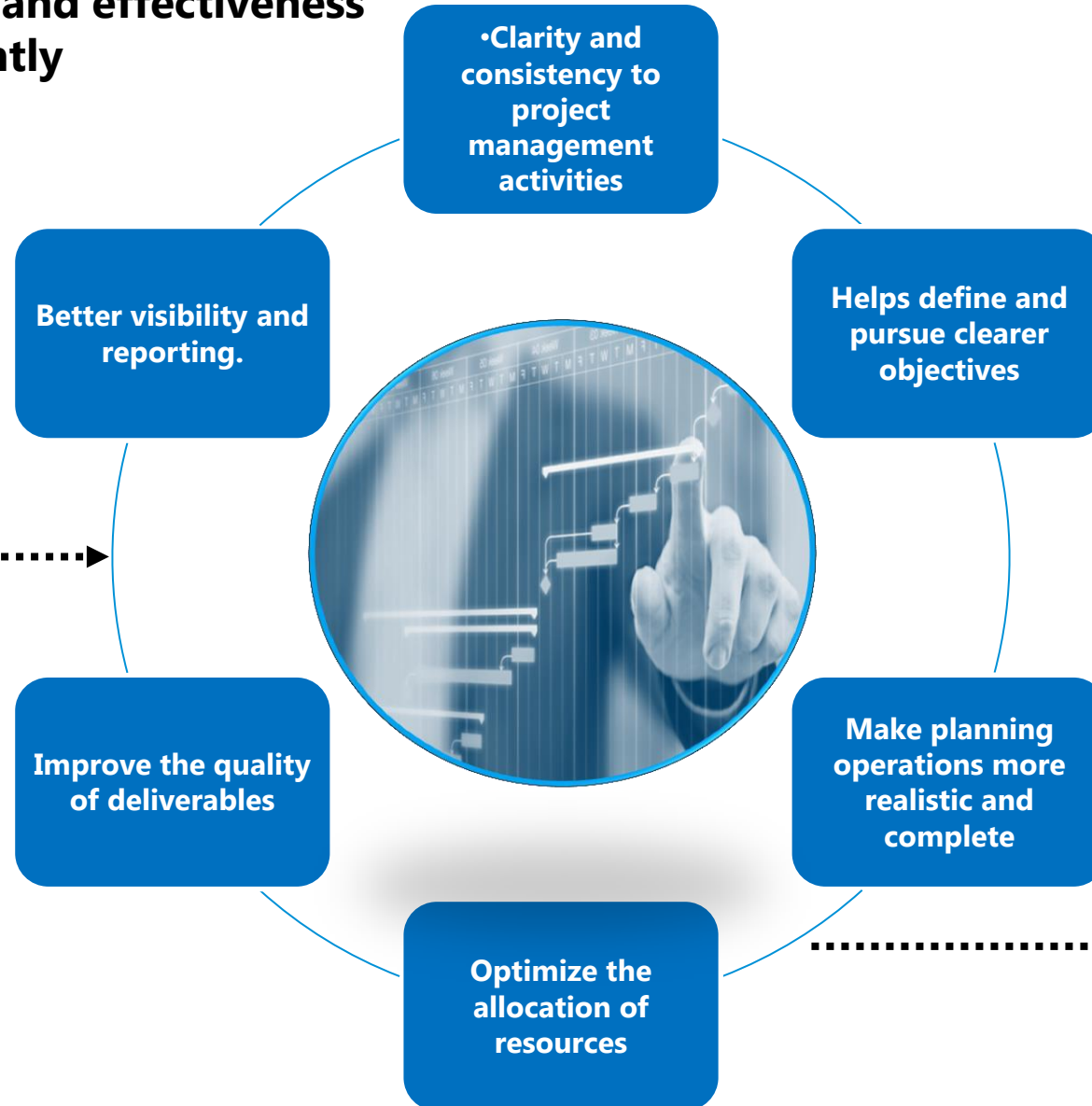
- 1 Because digital business leaders are increasingly generating a **continuous flux of threats and opportunities** with significant digital business implications.
- 2 Responding to these threats and opportunities often requires a **significant amount of effort and cost**.
- 3 It also requires **effective orchestration and governance at scale** — both of which are provided by an effective EPMO.
- 4 Core EPMO functions, such as the **execution of large, enterprise-wide initiatives and quick, effective portfolio prioritization**, as two of the most coveted capabilities for digital business success
- 5 With the right strategic relationships, a core focus on achieving key business objectives and outcomes, and positioning in the appropriate place in the enterprise, an **EPMO can significantly improve the enterprise's ability to execute a digital strategy and deliver value**.



# Traditional Project Portfolio Management (PPM)

Advanced the capabilities and effectiveness of organizations significantly

Typical traditional PPM benefits include.....

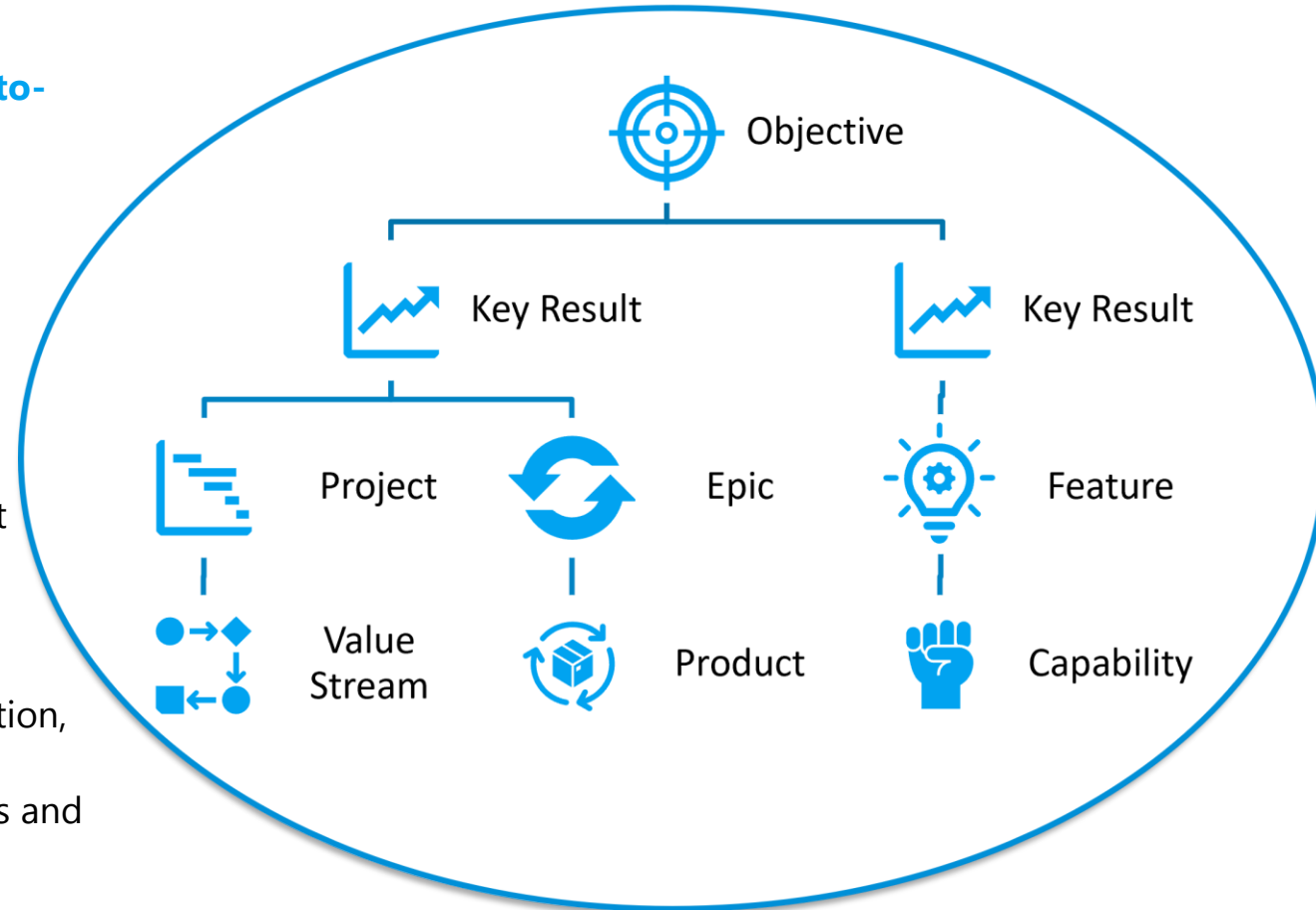


Many tools available that provide these capabilities, or just individual project and task management

# Strategic Portfolio Management (SPM)

Strategic Portfolio Management is a combination of business capabilities, processes and supporting portfolio management technology.

- Leadership requires SPM to support **enterprise-wide strategy-to-execution alignment and adaptation**.
- Definition of key business strategies and desired business outcomes, and mapping key portfolio elements, such as **business capabilities, investments, programs, digital and physical products, applications, and projects**.
- Capture, define and prioritize **business strategies**; manage the **execution of initiatives and projects** that drive the achievement of these strategies; and provide full visibility and management of **core functional assets**.
- Supports three key stakeholders from **Leadership** who sets direction, **IT/Functional management** who owns the critical assets in infrastructure and **Execution teams** that plan and deliver projects and products in the pursuit of reaching the business goals.



# Importance of Strategic Portfolio Management in Today's Business Environment

## Emerging Technologies and Business Models

The emergence of new technologies and business models creates **new opportunities and challenges** for organizations. OnePlan provides a framework for organizations to **evaluate and prioritize these opportunities**, and to ensure that they are aligned with their overall business strategy.

## Adoption of Agile and Other Project Management Methodologies

As more organizations adopt agile and other iterative project management methodologies, there is a **greater need for effective portfolio management**. OnePlan can help organizations to ensure that their **project portfolios are aligned with their strategic goals**, identify areas of overlap and duplication, and allocate resources more effectively.



## Increasing Complexity in Business Environments

As the business environment becomes more complex and uncertain, organizations are seeking ways to **manage risk** and **optimize their portfolios** to ensure they are **aligned with their strategic goals**.

## Greater Need for Financial & Resource Optimization

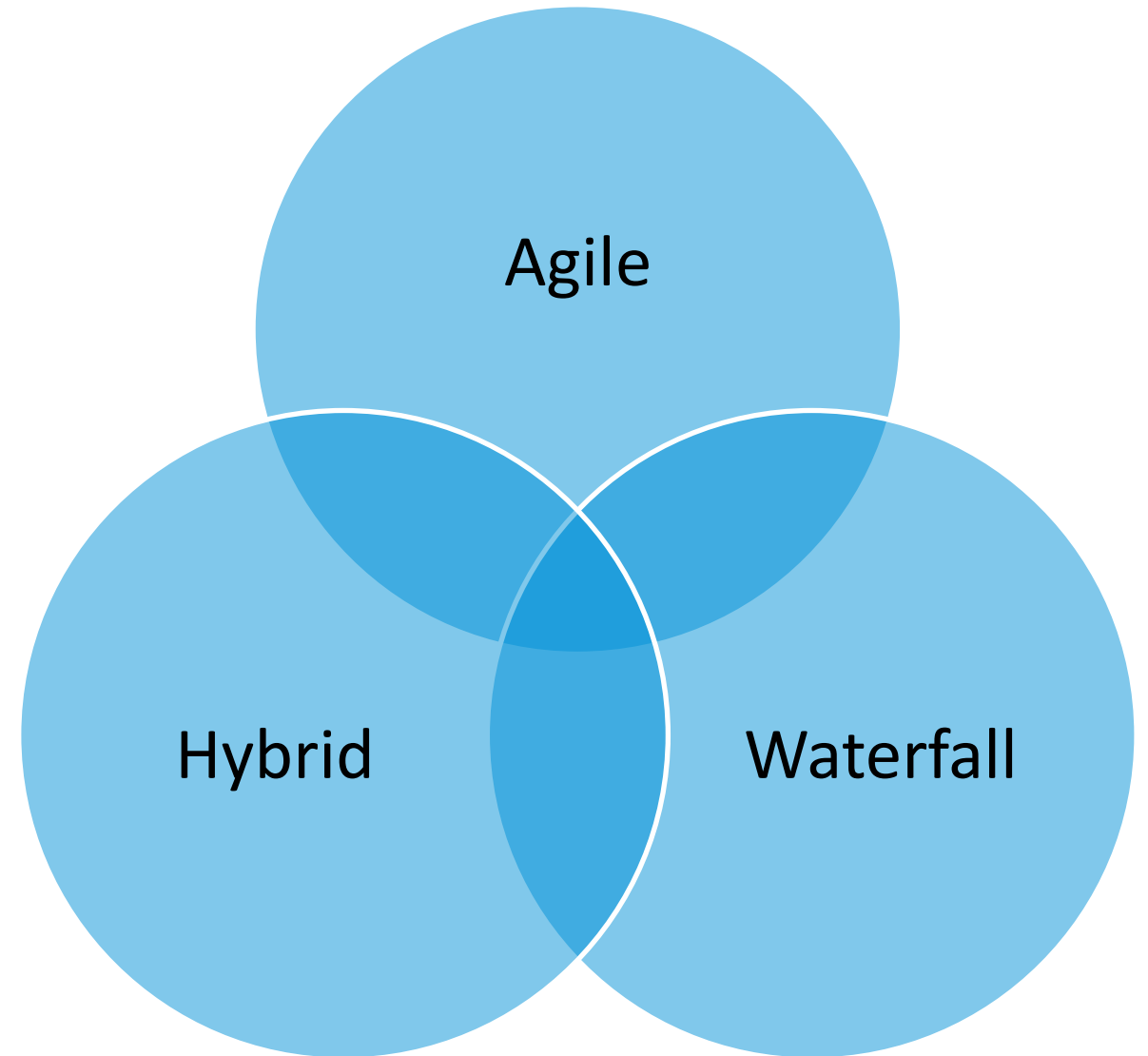
Many organizations are facing budget constraints and limited resources. OnePlan helps organizations to **identify and prioritize** the most critical projects and investments and **allocate resources** more effectively to **maximize their return on investment**.

## Demand for Data-Driven Decision Making





















































































With the increasing availability of data and analytics tools, there is a growing demand for data-driven decision making. OnePlan leverages data and analytics to provide **insights into portfolio performance**, enabling organizations to **make informed decisions** that align with their strategic goals.

# Different Execution Methodologies

- Agile continues to grow
- Waterfall is still widely used
- Agile variants
- Hybrid methodologies
- Personalized, cherry-picked versions
- Continuous Delivery



# Proliferation of Tools Across the Organization

	PMO	Marketing	Finance	Application Development	Operational Excellence	NPD	Engineering
Demand Management	 				 	 	
Portfolio Management	 					 	 
Project Management	       	     	     	 Azure DevOps    	   	    	  
Time Management	 	 	 	  		 	
Reporting & Analysis	 	 	 	 		  	 

# Organization & Information Silos Breed Increased Costs, Inefficiencies and Lack of Alignment

- Poor alignment and collaboration between participating functional areas
- Manual mash-ups of data from multiple tools and data sources
- Manual report creation, formatting and updating
- Duplication of efforts and data entry is time consuming, wasteful and prone to errors
- Disconnected information difficult to remain accurate and current across the board
- Chasing team members for timely/complete status and updates
- Comprehensive resource planning typically is its own separate data silo that is disconnected



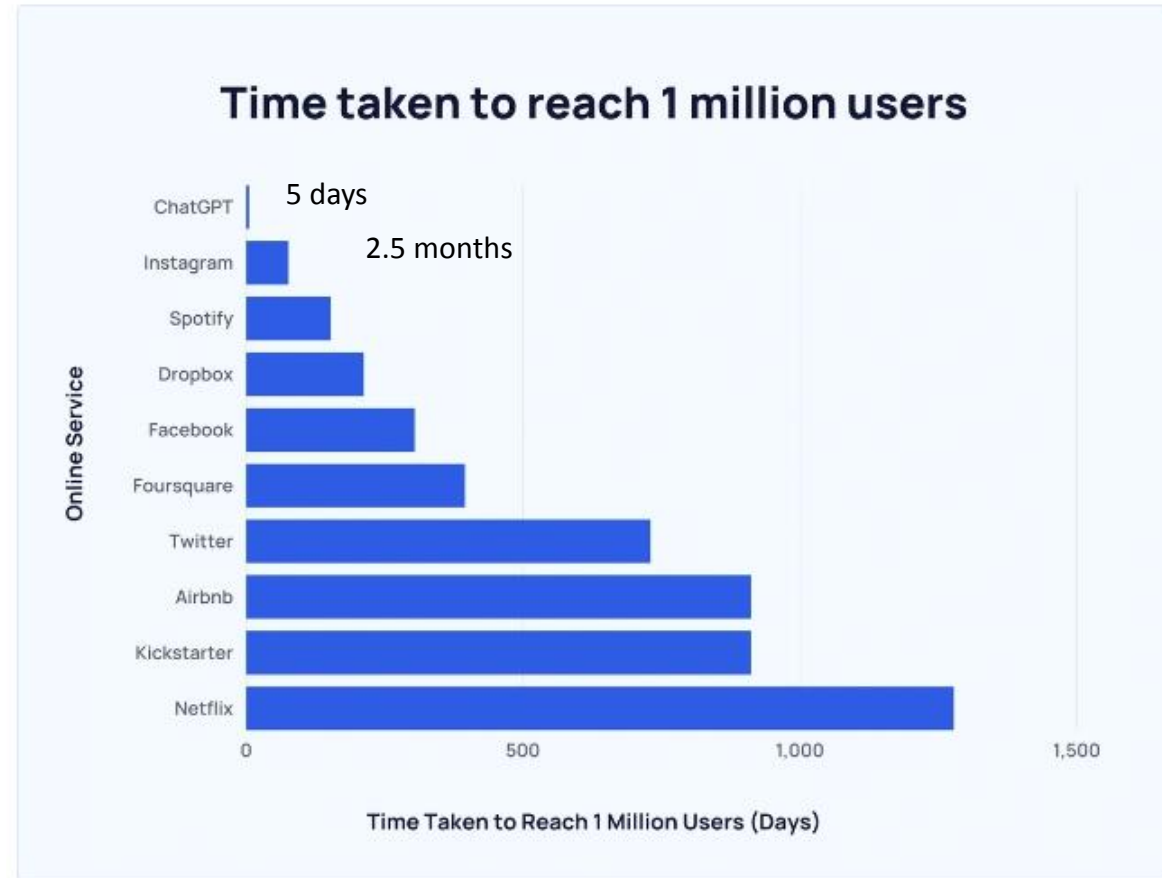
# AI Evolution and Rapid Adoption

ChatGPT currently has over **180 million** users (GA to the public November 2022).

## Common Use

### Cases

- Generating content
- Creating images
- Developing new drugs
- Designing products
- Optimizing operations
- Personalizing experiences
- Protecting data
- Making predictions
- Solving problems

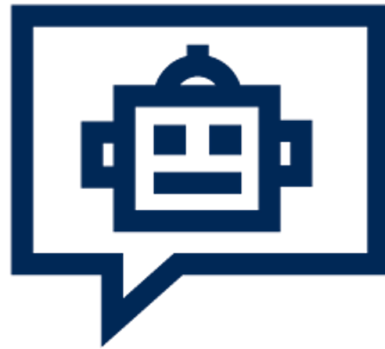


# Risks vs. Rewards

## Capabilities

- Text Generation
- Text Classification
- Text Summarization
- Language Translation
- Question Answering
- Code Generation

## ChatGPT



## Risks/Misuses

- Bias/Ethics
- Wrong Answers
- Copyright Violations
- Deepfakes/Misinformation
- Fraud
- Spam/Phishing

# Current Challenges



Strategic portfolio leaders must cut through GenAI hype



Must identify its business and functional implications fast



GenAI **will** impact your strategic portfolio management life cycle



Prepare now for four key inbound GenAI impacts to ensure effective strategic planning and execution



# Impacts on Strategic Portfolio Leaders

**1** The emergence of GenAI in the workplace and in the general public creates immediate knowledge and skills gaps

- For strategic portfolio leaders and their teams
- Left unaddressed, will negatively impact their ability to accelerate and optimize strategic planning and execution

**2** Leveraging and investing in GenAI will flood portfolio demand pipelines with competing investment ideas

- Requiring strategic portfolio leaders to manage and prioritize the demand for new, unfamiliar types of investments and initiatives

**3** Strategic portfolio leaders lack the partnerships they need to have to acquire the necessary data

- To get the most value from investments in GenAI designed to optimize strategic planning and execution

**4** Strategic portfolio leaders, program managers, project managers and delivery teams will experience dramatic changes in their responsibilities

- Due to the proliferation of GenAI technologies



# Recommendations for Strategic Portfolio Leaders

- ▶▶ Close, as quickly as possible, GenAI knowledge and skills gaps by training staff to recognize and exploit the potential for strategic portfolio management (SPM) efficiencies.
- ▶▶ Create portfolio activities, processes, checkpoints and standards designed to assess, evaluate, prioritize and manage GenAI-related portfolio demand from executive and senior leadership.
- ▶▶ Identify the types of data and data sources GenAI technologies require to optimize processes and activities in and around the SPM life cycle. Partner with the owners of these data sources to enable GenAI use.
- ▶▶ Document the known and perceived responsibilities of key positions within the SPM life cycle (e.g., portfolio managers, program managers, project managers, resource managers). As GenAI adoption and infusion progresses, change and update these positions and their responsibilities to ensure consistency and common understanding across the critical positions within the SPM life cycle



# Incorporate GenAI Into Overall SPM Practices



Source: Gartner  
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**Portfolio management leaders** do not need to take unnecessary risks with any GenAI investments, but **doing nothing now is risky** and leads to missed opportunities.

Instead, create a **practical GenAI adoption plan** featuring three main steps to GenAI business value.

# Key Findings

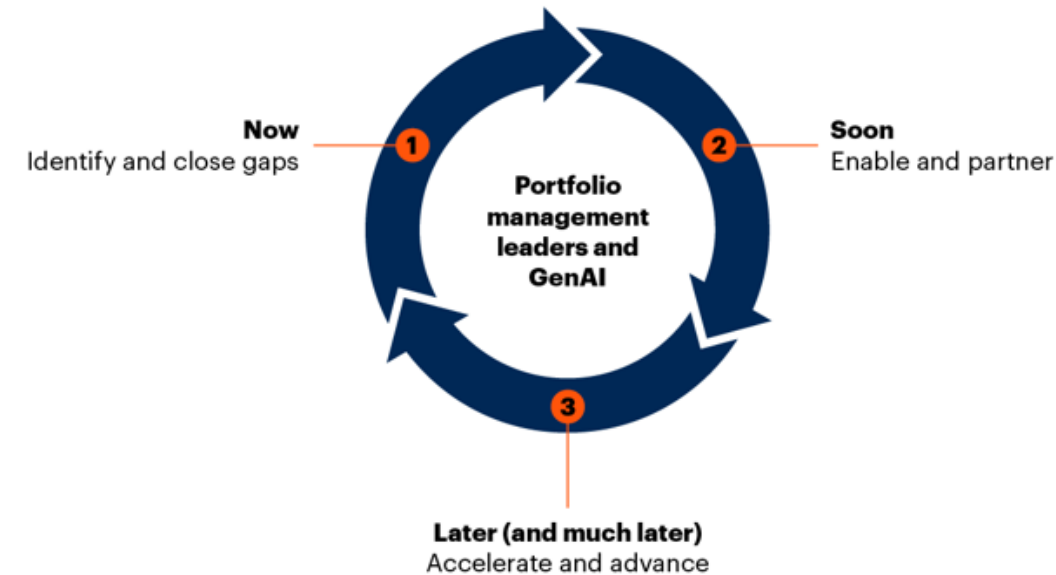
- ✓ Portfolio management leaders are pragmatic and practical by nature, and do not chase new trends or business fads. Unsurprisingly, many are applying an understandably analytical and sense-and-respond approach to generative AI (GenAI) hype, choosing to wait for GenAI to go mainstream and responding when that occurs.
- ✓ Whether portfolio management leaders have a plan for GenAI adoption or not, it will go mainstream in the workplace, which can have both positive and negative impacts on the strategic portfolio management (SPM) life cycle — especially if proper preparation isn't already in place.
- ✓ Enterprise-wide GenAI access will create challenges and opportunities for portfolio management leaders. Targeted and incremental GenAI training, pilots and adoption efforts designed to optimize strategic planning, and execution can help navigate the challenges and capitalize on improved overall portfolio execution.



# Recommendations

- ▶▶ Adopt a proactive vision and approach to valued GenAI investment focused using **three main steps: identify and close gaps, enable and partner, and accelerate and advance.**
- ▶▶ Create a practical GenAI investment plan for optimized strategic planning and execution by accounting for inevitable mainstream GenAI adoption in the enterprise.
- ▶▶ Track mainstream GenAI adoption in the enterprise to anticipate and overcome any emergent challenges — and execute targeted, incremental GenAI efforts to optimize the SPM life cycle using a clearly understood value proposition for each specific investment.

## First Three Steps for Portfolio Management Leaders and GenAI



# Common Project Manager Tasks

## Illustrative Time Savings per Project

PM task (per project)	Human task	Weekly time	AI assistance	Weekly Time with AI assistance	Time savings
Schedule creation and management	Creating and maintaining a project schedule	3 hours	Generates and alters schedule based on inputs	30 minutes	2 hours and 30 minutes
Status reporting	Creating status reports and summaries	1 hour	Generates status report based on information	15 minutes	45 minutes
Meeting management	Scheduling and summarizing meetings	1 hour	Schedules and summarizes meetings	15 minutes	45 minutes
Productivity evaluation	Determining team productivity and possible areas of efficiency gains	2 hours	Identifies and recommends actions for bottlenecks	30 minutes	1 hour 30 minutes
Resource allocation	Assigning and updating project resources to tasks	2 hours	Recommends assignments based on skills and prior work	30 minutes	1 hour 30 minutes
Budget management	Reviewing spend and recommending actions to stay on budget	30 minutes	Generates recommendations to stay on track	15 minutes	15 minutes
Risk management	Identifying and managing risks	2 hours	Identifies recommendations for risk management	30 minutes	1 hour 30 minutes
<b>Total</b>	N/A	11 hours 30 minutes	N/A	2 hours 45 minutes	8 hours 45 minutes

# Use Cases for AI in Strategic Portfolio Management

Use Case	Description	Benefit	Role
<b>Augmented Data Entry</b>	Create relevant information, such as project details, schedules, and budgets.	Reduce the time and effort required for manual data entry.	Project Manager Portfolio Manager PMO Leads Resource Manager Strategy Planning Leads
<b>Automated Information Retrieval</b>	Analyze SPM data, such as project schedules, resource allocation, and financials, to identify relevant information.	Reduce the time and effort required for analysis and synthesis.	Project Manager Portfolio Manager PMO Leads Resource Manager Strategy Planning Leads
<b>Communication Automation</b>	Automatically communicated to stakeholders, reducing the need for manual communication.	Reduce the time and effort required for generating communication.	Project Manager Portfolio Manager PMO Leads Strategy Planning Leads
<b>Resource Estimation</b>	Estimate the resources required for a project, reducing the risk of over- or under-staffing.	Reduce the time and effort required for resource analysis and estimation.	Resource Manager Project Manager Portfolio Manager PMO Leads
<b>Underperforming Investments</b>	Scrutinize project-related information and pinpoint any projects that are falling short of their objectives or are exceeding their budget.	Complement decision-making processes about whether to proceed with the project or terminate it.	Portfolio Manager PMO Leads Strategy Planning Leads

# Use Cases for AI in Strategic Portfolio Management

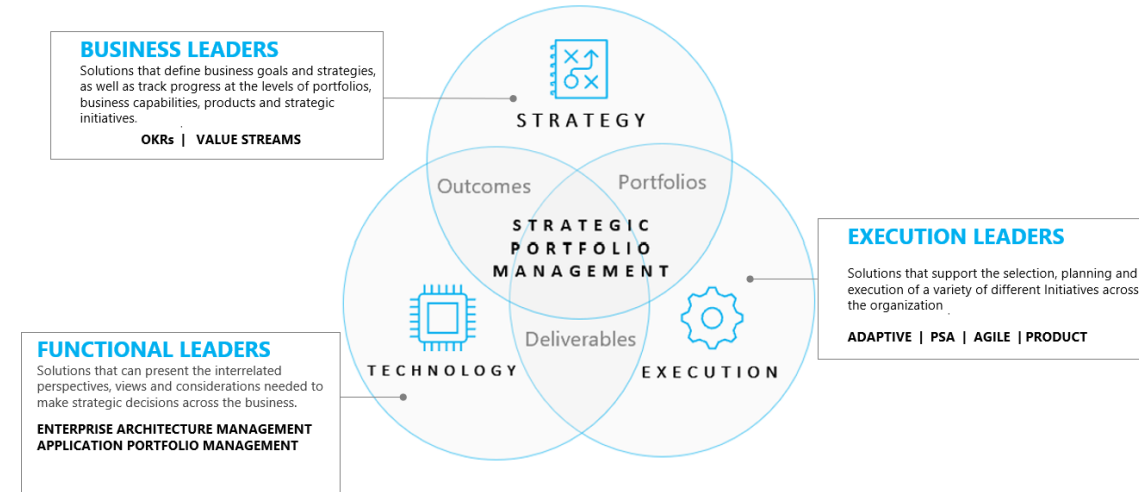
Use Case	Description	Benefit	Role
<b>Forecast Completion and Spending</b>	Identify recurring patterns and trends, which can facilitate precise forecasting.	Efficiently allocate their resources and manage their budgets effectively	Project Manager Portfolio Manager PMO Leads Strategy Planning Leads
<b>Budget and Plan Optimization</b>	Analyze project data to identify areas where budgets can be optimized, such as through resource allocation or process improvements.	Complement decision making on where to allocate resources	Project Manager Portfolio Manager PMO Leads Resource Manager Strategy Planning Leads
<b>Risk Identification</b>	Identify potential risks, such as schedule delays or budget overruns.	Mitigate risks before they become major impacts to an initiative.	Project Manager Portfolio Manager PMO Leads Strategy Planning Leads
<b>Defect Reduction</b>	Scrutinize project data to pinpoint the areas where defects are most likely to transpire	Mitigate risk of defects. Propose improvements.	Project Manager Portfolio Manager PMO Leads
<b>Data Anomalies</b>	Analyze portfolio data to identify patterns or outliers that may indicate errors or anomalies.	Identify and correct data issues to improve PPM Governance.	Portfolio Manager PMO Leads Strategy Planning Leads



# Demonstration

# Summary

- **Strategic Portfolio Management (SPM)** has become important in today's business environment
- **Increased complexity**, and the fast pace of change requires enhanced methods and approaches
- Evolution from departmental **PMOs to EPMOs** to address the needs of modern organizations
- **AI** has many applications in **Portfolio Management** and can greatly augment our human efforts
- The **use of AI** provides valuable assistance and insights to our Strategic Portfolio Management efforts





# Thank You!!

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