Portfolio Manager or PMO Director (PfMP)
A Player Agreement

Position Title:	Portfolio Manager (PfMP) or PMO Director
Reports to:	PMO Director or CIO
Performance Reviews:	Annually with Quarterly Touch Base
Type of Position:	Full-time-(40-55 hours per week)

Strategic Importance of this Role to the Company:

The Portfolio Manager or PMO Director are pivotal roles to the functioning and growth of the company. These positions are responsible for the management of a portfolio of technology or business programs and projects and are accountable for the on-time, on-cost and high-quality delivery of these programs. On time delivery to our end-user clients ensures that client satisfaction, client retention and profit margins are achieved. These are strategic positions and recognition of external and internal client requirements, strategic positioning of the enterprise and financial return-on investment is required.

My duties and responsibilities in this position are:

1. Portfolio Management:

Daily:

- Hold daily huddle with direct program manager reports. Roll-up status in daily e-mail to PMO Director, Divisional President and Controller
- Review detailed status of all programs and projects. Check for over/under variances and deploy countermeasure plans:
  - Timing
  - Financials
  - Resources
  - Project Performance

Weekly:

- Touch base with Program and Project Managers to discuss current project performance and discuss assignments with agreed upon timing.
- Present Portfolio, Program and Project reports at both the PMO and Divisional staff meetings.
- Communicate changes and impacts to stakeholders.
- Manage changes to scopes, schedule, and costs using appropriate verification techniques and standardized risk assessment methodologies.
- Ensure resource availability and allocation.
- Perform risk management protocols to minimize portfolio, program and project risks.
- Meet with Program Managers to discuss the status of invoicing, resources, budgets and timing.
- Conduct 1-2-1 meetings/coaching sessions with all direct reports.
- Update budgets.
- Work with all key vendors and third parties.

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Monthly:

- Present monthly portfolio status and action plans for all divisional programs and projects.
- 1-2-1 with each portfolio/program business owner to ensure satisfaction with portfolio and program performance.
- Assist in the definition of project scope and objectives of all new programs, involving all relevant stakeholders and ensuring technical feasibility.
- Roll-up and reconcile monthly financial reporting with divisional controller.
- Contribute to scoping, timing and costs for Request for Proposals (RFP's) with the stakeholders.

2. Talent Development:

Daily:

- Make 2 new contacts with PMP talent.
- Call 1 new candidate.

Weekly:

- Conduct weekly coaching sessions with each program manager.
- Discuss talent staffing with each program manager, and review their talent pipelines for projects.
- Hold at least two "skip-level" meetings with program and business analyst team.

Monthly:

- Hold and lead one Portfolio/Program/Project management training session with team.
- Write 2 white papers on Portfolio/Program/Project management continuing education skills.

Quarterly:

- Review performance against A Player Agreements will all direct reports.

Annually:

- Update A Player Agreements.
- Perform annual performance reviews with all direct reports.
- Ensure 100% of performance reviews are complete within the organization.

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3. Provide WOW! Customer Service:

Daily:

- Follow-up within 1 hour to all stakeholders with status on portfolio/programs/projects.
- Deliver solutions, not problems to stakeholders.

Weekly:

- Deliver and review weekly net promoter score program satisfaction survey on portfolio to stakeholders. Achieve a 9.0 score or better on all parameters.
- Fix/resolve any issues below a 9.0 rating

Monthly:

- Ensure all milestone completion satisfaction is above a 9.0 on all parameters.
- Fix/resolve any issues below a 9.0 rating.

Learning Program:

- To provide maximum professional growth opportunities, a formal learning program is offered:
- Each associate is asked to always be reading, listening to, or watching a developmental book, audio or video.
- Upon completion of the material and a short written summary/presentation of learning's and opportunities; the full cost of the material plus a $100 bonus will be paid.

Lead Measures-Critical Driver's: (Do This)

1. Review/Report all portfolio metrics (in real numbers) on a daily and weekly basis.
2. Coach program managers weekly and hold them accountable for results and program performance.
3. Perform Risk Management Protocols.
4. Contribute to scoping, timing and costs for Request for Proposals (RFP's) with Team.
5. Monthly Budget Wrap-up.
6. Weekly net promoter score program satisfaction survey to stakeholders.

Lag Measures-Key Performance Indicators: (Get This)

1. The on-time, on-cost and on-quality delivery of the portfolio, programs and projects you manage on a 95% weighted aggregate score.
2. Weekly, monthly and major milestone net promoter score program satisfaction surveys from stakeholders at 9.0 or greater.
3. Over 90% A Players on your team at any given time.
4. Over 90% monthly and annual resource utilization.
5. Over 65% gross margins on projects.

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I will uphold the following values while working in this position:

1. Positive Attitude: I will be cheerful and positive thinking at all times. I understand that attitude drive behaviors which drive results.
2. Integrity: I am honest and open in all relationships.
3. Problem Solver: I bring solutions, not problems to situations.
4. Above the Line: I bring results, not reasons. I admit when I am wrong and take accountability to resolve the situation.
5. Finisher: I finish what I start.
6. Fun: We get a result and then celebrate. I am upbeat and support my colleagues
7. Communication: I make sure that "closed loop clarity" exists in communication and use multiple channels if necessary to close the loop. I communicate any changes to prior agreements and expectations
8. Pro-active: I do not wait to be told what to do. I use my good judgment to anticipate needs of my teammates.
9. Learning: I love to learn and am not afraid to take developmental risks in order to improve as a professional and a person. I commit to continuous improvement.
10. Committed: I think of ways to improve myself and the organization/business at all times. Even when I am off the clock I do not check out.
11. No Cynicism: I am not cynical. I bring solutions, not problems.

I understand that an A Player is top 10% in the industry for his or her position as defined by this agreement, and I commit to be an A Player.

Reviewed and agreed to by: _____

Signature: _____Date:_____

Leader's Name: _____

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