



Participants Guide to P3M3[®] assessments



Preparing for an assessment

A P3M3 assessment is a process that uses a defined management maturity model to look across an organisation, and evaluate how it delivers its programmes and projects, and manages its portfolio(s). P3M3 looks at the whole delivery and management system and not just at individual processes, individual programmes or projects or persons. You should always remember that the maturity assessment team are here to help you and your project, programme and organisation to succeed and deliver better outcomes.

We like to think of ourselves as 'partners' rather than assessors.



1 Point of contact

Your PMO or appointed coordinator, will need to make contact with the lead assessor to discuss the assessment and any important elements. This could include critical delivery dates or availability of team members, executives and key stakeholders.

2 Documents and artefacts

Depending on the agreed models being assessed, the lead assessor will ask you to correlate key documents related to either the portfolio, programme, project and/or the organisation, related to the agreed assessment approach.

3 Business owner briefing

A one-on-one meeting will need to be coordinated with the assessment team and the primary Business Owner. This allows the assessment team to gather a better understanding of the expected assessment outcomes and any areas that the Business Owner may feel needs additional focus upon.

Managing the assessment

At this stage, as a result of your forward planning, things should run smoothly and without too many issues. During this phase, pre-arranged interviews will be undertaken, the Business Owner or PMO will be updated daily (or as agreed) and the maturity assessment team will start to build their draft report, which is based on findings from extensive interviews, desktop document reviews and additional discussions with portfolio, programme and project staffs, governing bodies, external providers and the Business Owner.



1 Interviews and discussions

The maturity assessment will conduct interviews, where and when agreed. Early notice should be given if interviews are changed, cancelled or if interviewees are unable to attend. All interviews are 100% confidential and any comments and feedback from interviewees, is non-attributable within the assessment report.

2 Clarifications and further information

The lead assessor is the primary point of contact, and as such, may have enquiries or clarifications that will need to be answered in a prompt manner, so the assessment team can continue to schedule. This may include further documentation required or clarifications on feedback received during interviews.

3 Draft reporting

Once the assessment team has completed interviews, they will head back to their base and commence developing the draft report - which will be reviewed by the Business Owner or PMO.

Closing an assessment

We hope that you enjoyed the maturity assessment process, and that the process has provided your organisation with the outcomes that were required. Now that the interviews and draft report are complete, the maturity assessment team is eagerly finalising the maturity assessment report and roadmap for the Business Owner. The final report has been developed specifically for the Business Owner following a P3M3 maturity assessment process, but also includes specific areas which the PMO, governing groups or the Business Owner may have requested. Remember, all information gained from the interviewing process are non-attributable to the final issued report.

1 Finalising the report and roadmap

After an initial review of the draft report, recommendations and the maturity roadmap, the assessment team will include any adjustments to the report and roadmap, and issue the final version to the Business Owner and/or PMO.

2 Returning documents and data

If you have provided the assessment team with any paper based documents, they should be returned to the issuer. The assessment team will securely destroy any digital copies of documentation supplied for the review - which supports best practice for cyber security.

3 Presentation, closure and handover

The role of the assessment team is complete. The Business Owner and PMO have been de-briefed and presented with the final maturity assessment report, which contains scoring, observations, recommendations and a maturity roadmap - that the business may (or may not) adopt and action.





Participating in an assessment

Our team is passionate about assurance and more importantly, are focused on helping programmes, projects and organisations to succeed. We know first hand, the challenges and uncertainty of program and project environments, we focus on supporting people and organisations throughout the assurance process and ensure that achievements are highlighted, and that opportunities for improvements are clearly identified.

1 Relax

Relax and enjoy the opportunity to express your views, experiences and understanding of your program, project or business area. This is a great time to talk about what you see as being done well, and the areas that you might be concerned about.

2 Respond

Don't over prepare or study for an interview. Interviews are conducted in a highly confidential and relaxed environment, more of a conversation to better understand your environment. The assessment team will guide you through the process, and work through lines of inquiry and any clarifications.

3 Inform

Be open minded and honest through the interviews. We are 100% independent and our assessment team are only looking for the best outcomes for you and your organisation. Everything you say is in confidence and we do not use individual names or roles in reports, as we are not reviewing individuals.

Leading P3M3® maturity model specialists

Since 2015, PM Solutions continues to be a licenced Axelos Consulting Partner and Axelos P3M3 maturity model Consulting Partner, and are accredited to be able to provide exclusive benefits to organisations undertaking P3M3 maturity assessments.



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