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PRACTICAL GUIDES FOR
PROJECT PROFESSIONALS

The PMO Setup Kit

A step-by-step guide and ready-to-use templates for standing up a Project Management Office

Assess · Charter · Govern · Prioritize · Report · Mature

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STEP 06

Build Intake and Prioritization

Intake gives all new demand one front door. Prioritization turns that demand into a ranked, capacity-aware recommendation for the people who fund work. Together they replace the loudest-voice-wins approach.

You will produce	Use
One intake channel · approved criteria and weights · ranked demand · scenarios for the portfolio forum	Workbook: Scoring Weights, Intake & Prioritization · Word: T04 Investment Case

6.1 The intake and prioritization cycle

1. **Capture** all demand through one channel and give every request an ID. Tag mandatory and regulatory work separately from discretionary work.
2. **Screen** for duplicates, strategic fit, safety and legal obligations, minimum business-case quality and an accountable sponsor.
3. **Score** discretionary requests on six approved, weighted criteria.
4. **Check feasibility** against funding, critical skills, dependencies, risk appetite and expected benefits.
5. **Offer scenarios** to the portfolio forum (fund now, defer or de-scope) and state the opportunity cost.
6. **Log and communicate** each decision, and re-score on material change or at the quarterly refresh.

6.2 Criteria and starting weights

Criterion	Starting weight	Scoring note
Strategic alignment	30%	Strength of traceable contribution to a named strategic objective.
Measurable business benefits	20%	Evidence-backed benefit size and confidence.
Execution feasibility (risk-adjusted)	15%	Achievability and controllable risks; higher is better.
Capacity / funding fit	15%	Funding and scarce-skill availability.
Time criticality	10%	Consequence of deferral; avoid inflated urgency.
Compliance / assurance contribution	10%	Degree of improvement. Legally mandatory items are tagged, not outvoted.

Weighted score = Σ(score from 1 to 5 × approved weight), so the maximum is 5.0. The **Intake & Prioritization** tab calculates the score, ranks discretionary requests and assigns a suggested priority band. Change the weights on the **Scoring Weights** tab only with your portfolio council's approval; the workbook will not calculate scores until the weights total 100%.

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Safeguards

No score funds work automatically. A high score earns a closer look, not an approval.

Mandatory work is tagged, not outvoted. Legal and regulatory obligations are tracked separately.

Score urgency honestly. Ask what happens if the work waits a quarter.

Record the decision and tell the requester, including when the answer is no or not yet.

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TEMPLATE T01

PMO Charter

Owner: Executive sponsor · **Use when:** Step 3, before launch; review at least annually

Organization: [Organization] · **Version:** [v0.1] · **Date:** [Date] · **Status:** [Draft / Approved]

PMO name	**[PMO name]**
Mandate	The **[PMO name]** serves **[customers]** by enabling value-based portfolio decisions, proportionate delivery standards, visibility and benefit ownership.
Model	**[Supportive / Controlling / Directive / Enterprise / Hybrid]**
Sponsor and authority	Executive sponsor: **[name]**. Reports to: **[committee]**. Delegation matrix: **[link]**. The PMO may **[advise / assure / manage]** but may not approve funding unless explicitly delegated.
Operating objectives	1. **[Outcome / metric / target / date]** 2. **[Outcome / metric / target / date]** 3. **[Outcome / metric / target / date]**
In scope	Portfolios, entities, project types and tiers: **[scope]**
Out of scope	**[Exclusions, including routine operational work if applicable]**
First services	**[List the first services, e.g. intake, prioritization, governance support, status reporting, RAID, benefits tracking]**
Decision framework	Funding: **[authority]**. Changes: **[authority / threshold]**. Exceptions: **[authority]**. Escalation: **[time / role]**.
Service ownership	PMO lead **[name]**; portfolio **[name]**; controls **[name]**; analytics **[name]**; benefits **[name]**; AI / security **[name]**
Measures and reporting	KPIs: **[list]**. Cadence: **[monthly]**. Data steward: **[name]**. Reviewed by: **[forum]**.
Resources	Staff: **[roles / FTE]**. Tools: **[systems]**. Budget: **[amount or n/a]**.
Review and renewal	Effective **[date]**; reviewed **[cadence]**; changed only with **[approval]**.

Approval

Executive sponsor (name / signature / date)	
PMO lead acknowledgment (name / signature / date)	

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Inside the Templates Workbook

20 Excel tabs with working formulas, dropdowns and charts

Maturity Summary: baseline, target, gap and priority by dimension

Maturity Summary – Baseline and Target

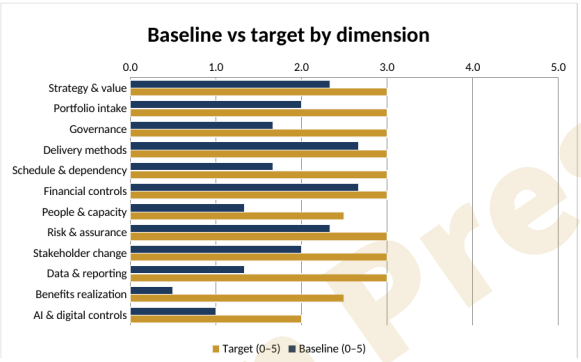
Baseline = average of scored items for each dimension (unknowns excluded). Enter your target (0–5) after reviewing findings with your sponsor.

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PREVIEW – all data on this tab is fictional example data for Harborview Regional Services (fictional example).

Dimension	Items scored (of 3)	Baseline (0–5)	Target (0–5)	Gap	Baseline level	Suggested priority (by gap)
Strategy & value	3	2.3	3.0	0.7	Emerging	Low
Portfolio intake	3	2.0	3.0	1.0	Emerging	Medium
Governance	3	1.7	3.0	1.3	Emerging	Medium
Delivery methods	3	2.7	3.0	0.3	Defined	Low
Schedule & dependency	3	1.7	3.0	1.3	Emerging	Medium
Financial controls	3	2.7	3.0	0.3	Defined	Low
People & capacity	3	1.3	2.5	1.2	Ad hoc	Medium
Risk & assurance	3	2.3	3.0	0.7	Emerging	Low
Stakeholder change	3	2.0	3.0	1.0	Emerging	Medium
Data & reporting	3	1.3	3.0	1.7	Ad hoc	Medium
Benefits realization	2	0.5	2.5	2.0	Ad hoc	High
AI & digital controls	2	1.0	2.0	1.0	Ad hoc	Medium
OVERALL	**34**	**1.8**	**2.8**	**1.0**		

Priority thresholds (gap ≥ 2 High, ≥ 1 Medium) are suggestions. Validate material findings with at least two evidence sources where feasible.



Portfolio Dashboard: live roll-up of the other tabs

Portfolio Dashboard

Live roll-up of the other tabs. Values support decisions; they are not performance claims. Check the as-of date and data freshness before presenting.

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PREVIEW – all data on this tab is fictional example data for Harborview Regional Services (fictional example).

SETTINGS	
Stale-data threshold (days)	7
Dashboard as of	11/10/2026

PORTFOLIO	
Active projects	7
Approved budget (active)	$2,240,000
Estimate at completion (active)	$2,420,000
Portfolio cost variance	8.0%
Projects forecasting a slip	4
Stale or undated records	2

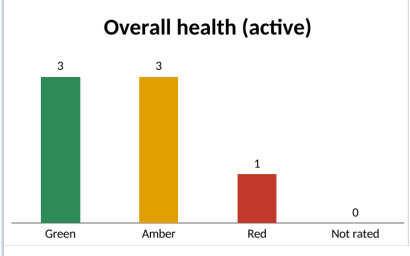
RISKS, ISSUES AND CHANGE	
Open risks	4
Open high-exposure risks (≥15)	2
Open issues	1
Overdue RAID actions	2
Pending change requests	2
Approved change cost impact	$30,000

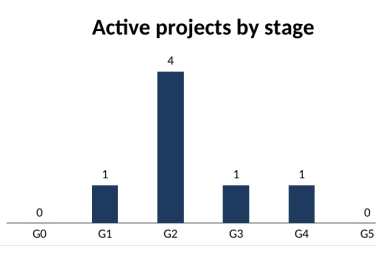
DEMAND AND VALUE	
Intake requests logged	8
Awaiting decision (unreviewed)	3
High-priority discretionary requests	0
Benefits tracked	4
Benefits measured (actual entered)	2
Average attainment (measured only)	77%

CAPABILITY AND GOVERNANCE	
Maturity items scored (of 36)	34
Average maturity baseline (0–5)	1.8
Decisions logged	4
Gate records awaiting review	1
KPIs met / with results	3 / 7
Rollout tasks done	9 of 22

HEALTH OF ACTIVE PROJECTS	
Green	3
Amber	3
Red	1
Not rated	0

ACTIVE PROJECTS BY STAGE	
G0	0
G1	1
G2	4
G3	1
G4	1
G5	0





Screenshots show fictional example data for Harborview Regional Services, a fictional organization. The workbook in the kit comes with blank tabs and a few clearly marked example rows.

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Get the full kit

Everything in this sample, plus the rest of the guide and every template

1. Setup Guide

33-page PDF + editable Word. 11 steps: assess, choose a model, charter, operating model, governance, intake, standards, reporting, AI guardrails, 30/60/90 rollout, maturing the PMO.

2. Templates Workbook

20 Excel tabs: maturity self-assessment and summary, PMO charter, governance & RACI, scoring weights, intake & prioritization, portfolio register and dashboard, RAID log with heat map, status report, change control, benefits tracker, decision log, stage gates, KPI catalog, capacity, AI use register, 30-60-90 plan.

3. Charter & Control Templates

12 editable Word templates (T01–T12): charter, service catalog, discovery, investment case, portfolio council, stage gate record, escalation, change request, benefits plan, data dictionary, AI use-case review, launch readiness.

4. Internal PMO Proposal / Business Case

Optional Word template for winning approval, staff and budget from your leadership.

5. Leadership Pitch Deck

14 editable PowerPoint slides with speaker notes.

6. Quick-Start Checklist

The 30/60/90-day rollout on one printable page.

Written by Sean T. Benson, PMP, LSSBB: 21-year U.S. Marine Corps veteran, former Director of IT PMO at Palomar Health, professor of leadership and project management at National University, and author of Establishing A PMO: A Guidebook for Project Management Professionals.

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This kit provides general guidance on setting up and running a Project Management Office. It is not legal, financial, regulatory, or compliance advice, and it is not a guarantee of any result. Outcomes depend on your organization, its leadership, and how the guidance is applied. Durations, service levels, weights, thresholds, and scoring scales are illustrative starting points, not validated benchmarks; adapt them and obtain the approvals your organization requires before use. Example rows, names, and figures are fictional.

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