



# Program Management Office (PMO) Implementation

## *National Insurance Brokerage*

### ***Type of Business***

Financial services client focused primarily on distributing property & casualty and employee health & welfare insurance products and services to small and mid-sized business clients.

### ***Statistics***

Annual Revenue:  
\$500 Million

Retail Offices: 90 offices in 18 states

Contact Information  
Available on request

### ***Business Challenge***

Client identified a goal / vision to transform their enterprise by establishing a shared services capability for back office accounting and information technology in order to reduce the high business support costs and lack of standard processes in a distributed environment. With a Program of this magnitude, Client needed a centralized management structure and standard processes to manage the multiple interdependent projects that composed the Program.

### ***Action and Results***

Client management engaged Avalion to establish and operate a Program Management Office (PMO). With limited existing PMO processes in place, Avalion was tasked with designing several program / project management processes / work approaches and an executive reporting structure. Avalion also led the operations of the newly created PMO.

**Within a short time period, Avalion designed and documented multiple PMO tools and processes including resource management, project initiation, issue & risk management, scope change management, and project management. In deploying these disciplines Client recognized greater on time / on budget project implementations as well as the ability to prioritize the annual IT program plan.**