

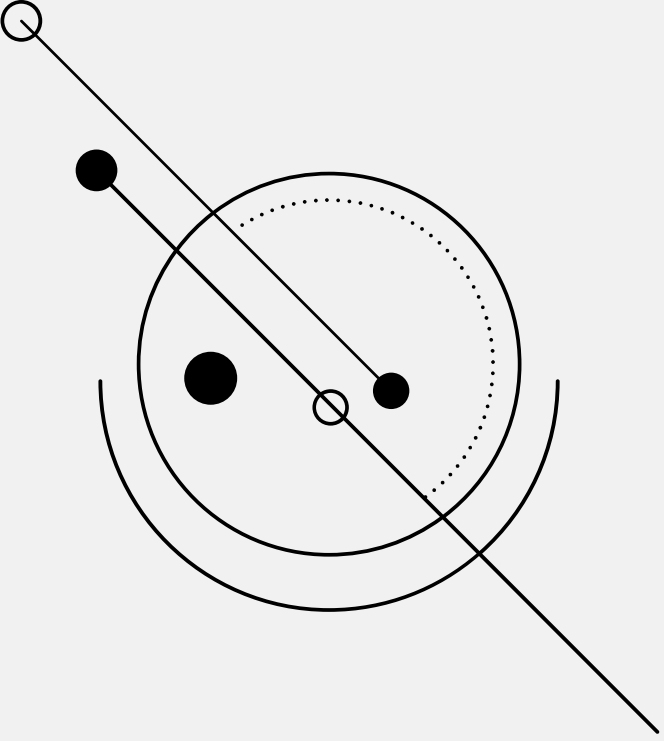


COCR8 CONSULTING

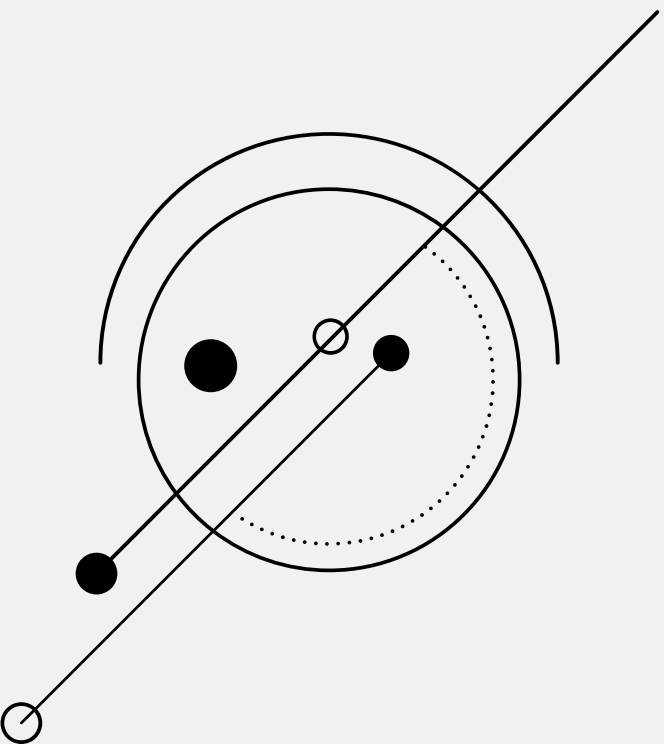
Emergenetics PMO Implementation

Presented by Bhavneet B, Brandon Casey, Connor S,
Julie V

IMT 585 WINTER 2026



Today's Agenda



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Meet the CoCr8 Team!



Bhavneet B

Risk and Governance
Consultant

Process and regulation expert who brings a methodical approach and consistent effort that amplifies momentum



Brandon Casey

Organizational
Consultant

A hybrid doer and avid learner, who quickly understands your needs, your team, and partners to deliver results



Connor S

Senior Consultant

19 years of experience as Digital Health catalyst. Program design, launch, and improvement driver. Learn by doing fanatic



Julie V

Lead Consultant

Consumer insights, analytics and strategy expert who understands and aligns needs of diverse stakeholders to drive action.



Introduction to CoCr8

- We combine extensive healthcare experience, strong program management capability, and a collaborative consulting approach
- Our experience powers our ability to navigate complex stakeholder relationships, governance challenges, and cross-functional coordination
- We specialize in identifying root causes, and transforming process wins into scalable and aligned systems.
- CoCr8 uses a collaborative “teach-to-fish” model delivering value well beyond the active phase of our engagement.



CoCr8 Unique Value Proposition

Conventional Consulting Firms

CoCr8

Isolated Experts - Work in parallel to your teams. Lagging value, arises only if you act on recommendations.

Collaborators: Identify, engage, empower talent within your organization, multiply impact, and sustain improvement

Your team left on the side line: often they are negatively impacted as they are interviewed and observed, but not engaged as equals.

Co-Create with your team: We partner with your team to implement a "learn by doing" approach & begin delivering wins immediately.

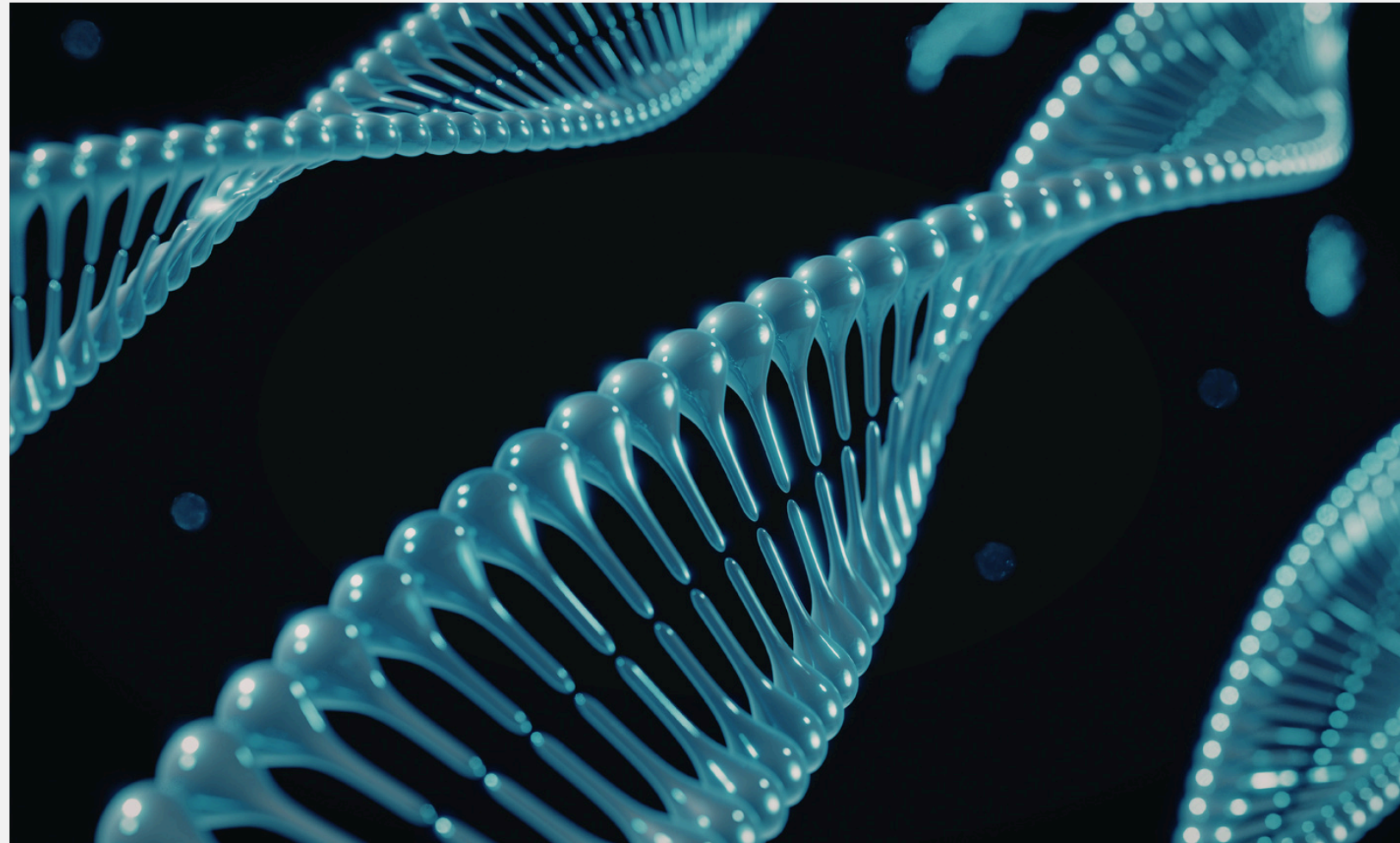
Untested ideas: They may have worked at other organizations, or theoretically, but will they be right for your organization?

Proven solutions: We deliver results that only arise from experimentation in the production environment

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Problem Statement



Scaling Pressure in a Biotech Environment

- Rapid organizational growth increasing operational complexity
- Cross-functional initiatives require coordinated oversight
- Current systems lack maturity for enterprise portfolio management

Fragmented Portfolio Visibility

- No centralized portfolio view across initiatives
- Limited visibility into timelines, dependencies, and risks
- Reduced strategic alignment across initiatives

Reactive Execution & Manual Reporting Burden

- Decentralized project reporting
- Significant administrative burden compiling status updates
- Leadership focuses on activity instead of outcomes

Limited Governance & Prioritization Discipline

- No formal PMO governance structure
- Inconsistent initiative intake and prioritization
- Resource allocation driven by urgency rather than strategy

Our Innovative Solution: The Strategic PMO Operating Model

The Core Shift: From fragmented reporting to a strategic execution engine powered by governance, portfolio intelligence, and co-creation all enhanced by data and AI when valuable.

We integrate portfolio intelligence, governance discipline, and co-creation to transform GBO into a scalable strategic capability, accelerating EmerGenetics' ability to scale operations and deliver differentiated business results.

AI-Enabled Portfolio Intelligence

- Real-time portfolio visibility
- Risk + dependency trend detection
- Reduced manual reporting burden

Governance + Benefits Realization

- Structured intake + prioritization
- Defined decision rights + escalation
- Outcomes over activity tracking

Co-Creation Capability Transfer

- Workshops + internal enablement
- Early visible wins
- Sustainable PMO ownership

Result: GBO becomes a trusted, data-driven strategic partner – not a perceived bottleneck.

Technical Approach

Force Multiplier

- Engage, empower, and activate your teams.
- ROI multiplied by:
 - Current working solution spread
 - Internal team development

Deep Expertise

Latest in:

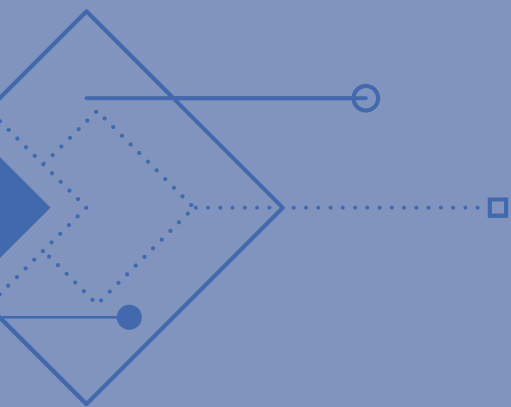
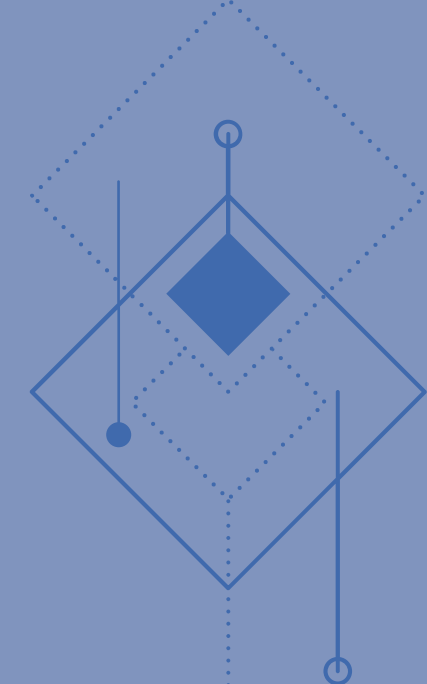
- Value added AI assessment and implementation
- Consulting and management practices, including:
 - Portfolio governance
 - Performance measurement
 - Data-driven decision support.

Program Management as a Strategic Capability

- Enable essential components, such as benefits realization management
- Align initiatives with EmerGenetic's organizational goals.

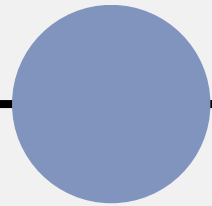
Restore Leadership's Trust in GBO

- Deliver early wins through PoC & learn by doing.
- Transparent governance:
 - Reporting and governance structures that provide leadership with clear, reliable, and actionable insight



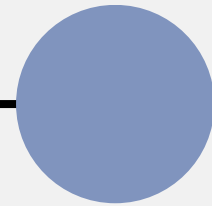
Technical Approach Roadmap

PMO Established Phase 1 (0-3 Months)



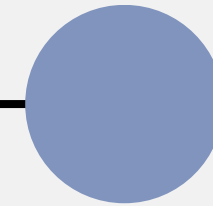
- 1) Engage all relevant stakeholders
- 2) Inventory core business systems & processes.
- 3) Measure current state
- 4) Summary of findings & proposed PMO structure

Portfolio Management & Execution: Phase 2 (4-9 Months)



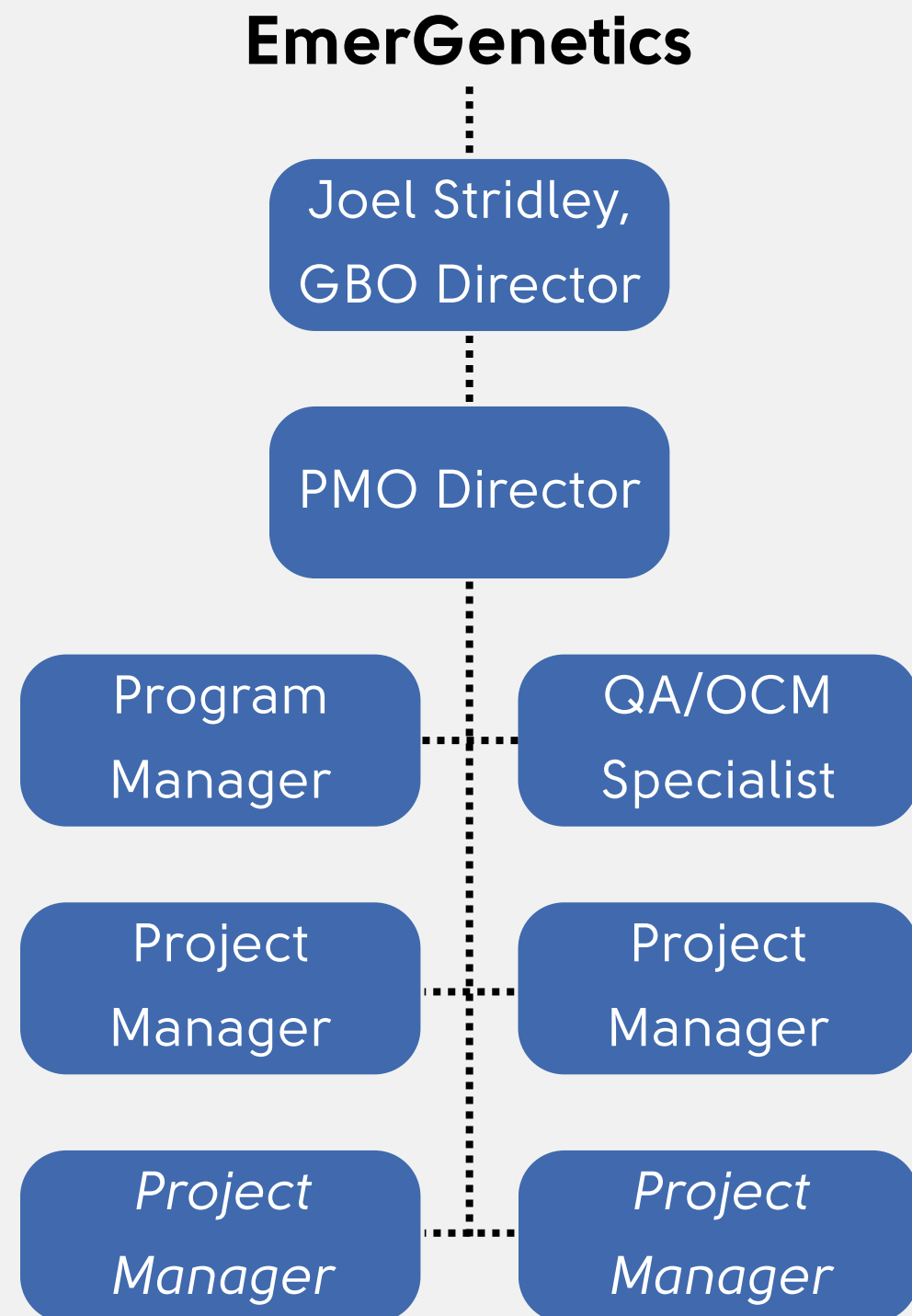
- 1) Strategic capability elements:
 - Process for prioritizing, tracking process
 - Process for intake into the portfolio
- 2) To restore transparency & trust:
 - Preparing regular reports & reviews - risks and issue management
 - Develop & launch tool to track and control initiatives
 - Workshops & communication
- 3) Execute quick wins identified in Phase 1

Optimization & Transformation: Phase 3 (10-12 Months)



- 1) Pull & analyze target vs. actual results
- 2) Analyze feedback loops and drive iterative improvement
- 3) Ongoing communications and training
- 4) Go / No-Go check based on results to date.

Management Approach



PMO Director

Owns overall program health and performance, establishes and maintains governance, manages the program roadmap.

Program Manager

Monitors portfolio-wide progress and ensures initiatives are regularly assessed for alignment and viability.

QA/OCM Specialist

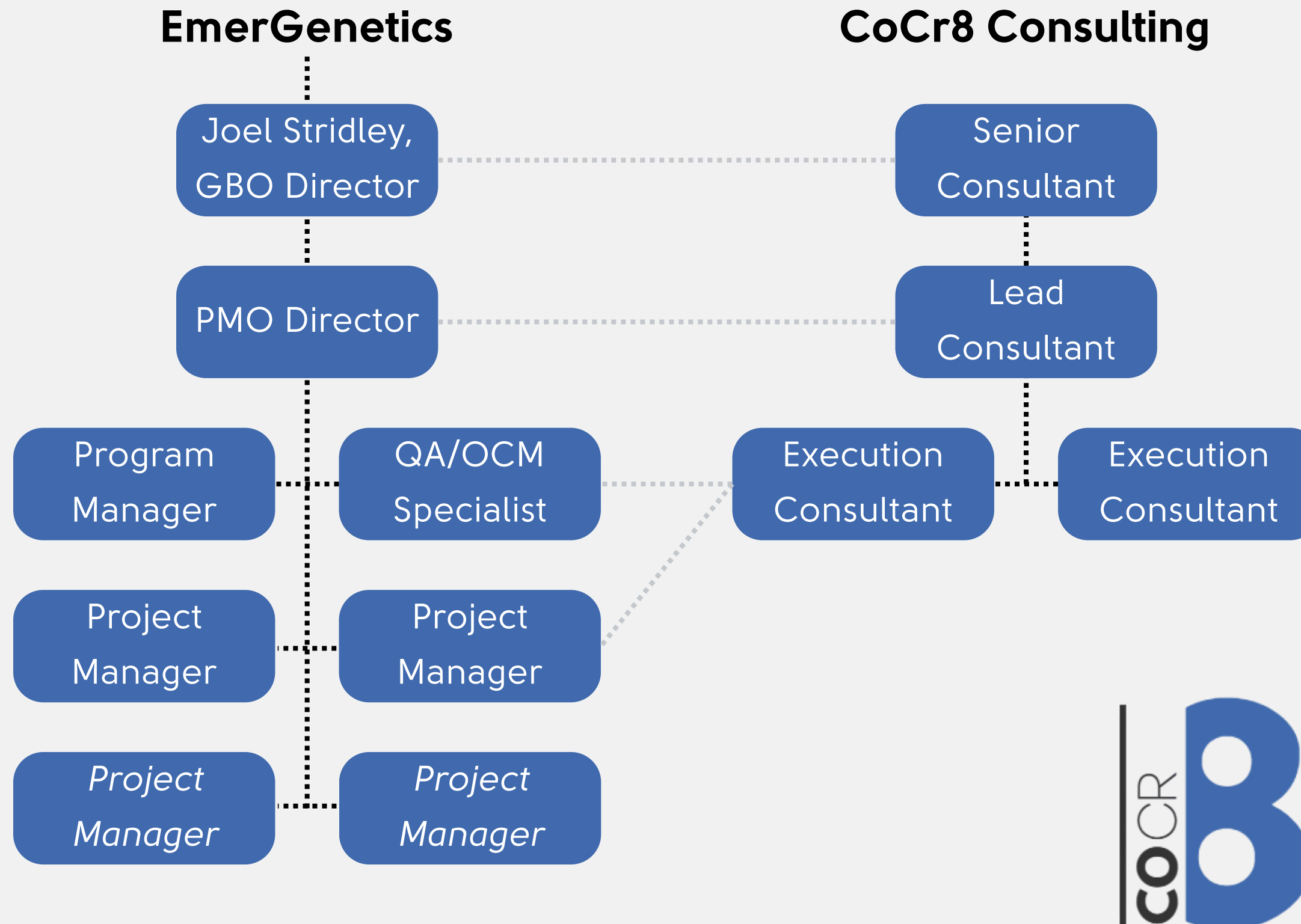
Manages business continuity, defines and tracks KPIs for benefit realization, prepares GBO for transition.

Project Manager

Identifies scope and goals of initiatives, manages resources, communicates with stakeholders, ensures on-time delivery



Management Approach



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Owns overall program health and performance, establishes and maintains governance, manages the program roadmap.

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Manages business continuity, defines and tracks KPIs for benefit realization, prepares GBO for transition.

Project Manager

Identifies scope and goals of initiatives, manages resources, communicates with stakeholders, ensures on-time delivery

Reporting

PMO Director

- Cadence: Weekly Status Report
- Purpose: Capture initiative health, milestones, blockers, and dependencies.

Executive Leadership, Steering Committee

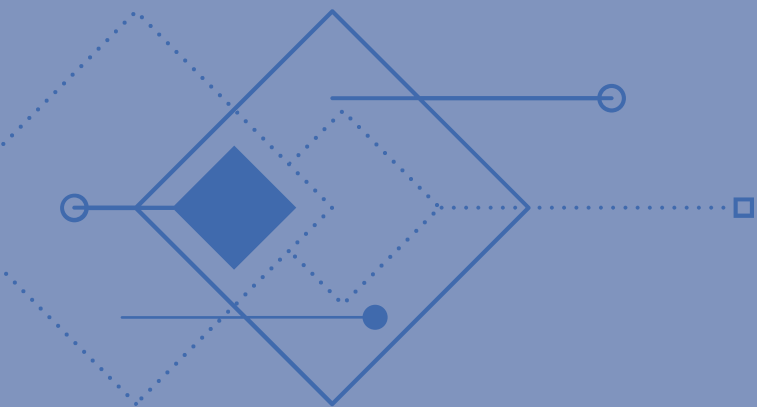
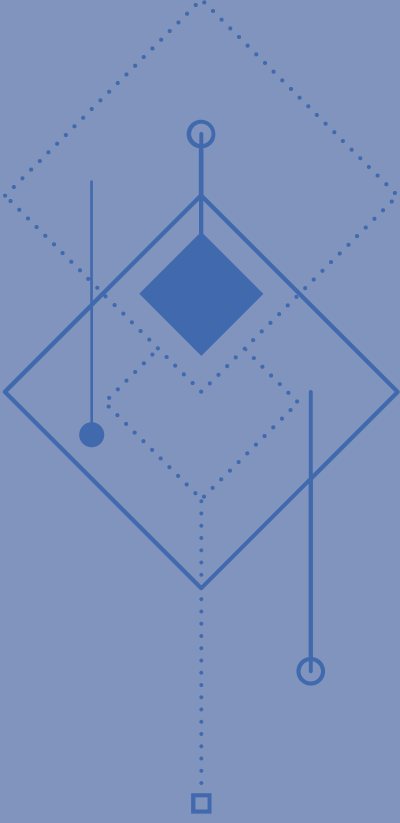
- Cadence: Monthly Executive Briefing
- Purpose: Track progress against strategic objectives and evidence of growth enablement.

Joel Stridley, GBO Leads

- Cadence: Bi-Weekly Status report
- Purpose: Provide an outcome-oriented view of progress, resource utilization, risks, and decisions required.

Board of Directors

- Cadence: Quarterly Program Status
- Purpose: Program status report focuses on strategic alignment, outcome-based metrics, and trajectory.



Governance Strategy

Top Tier – Strategic Governance

Executive Steering Committee

- Portfolio oversight
- Strategic priorities & benefits realization
- Quarterly executive reporting
- Final escalation authority

Middle Tier – Program Governance

PMO Governance Board

- Initiative intake & prioritization
- Portfolio coordination
- Monthly performance reviews
- Governance documentation (Smartsheet AI)

Bottom Tier – Operational Control

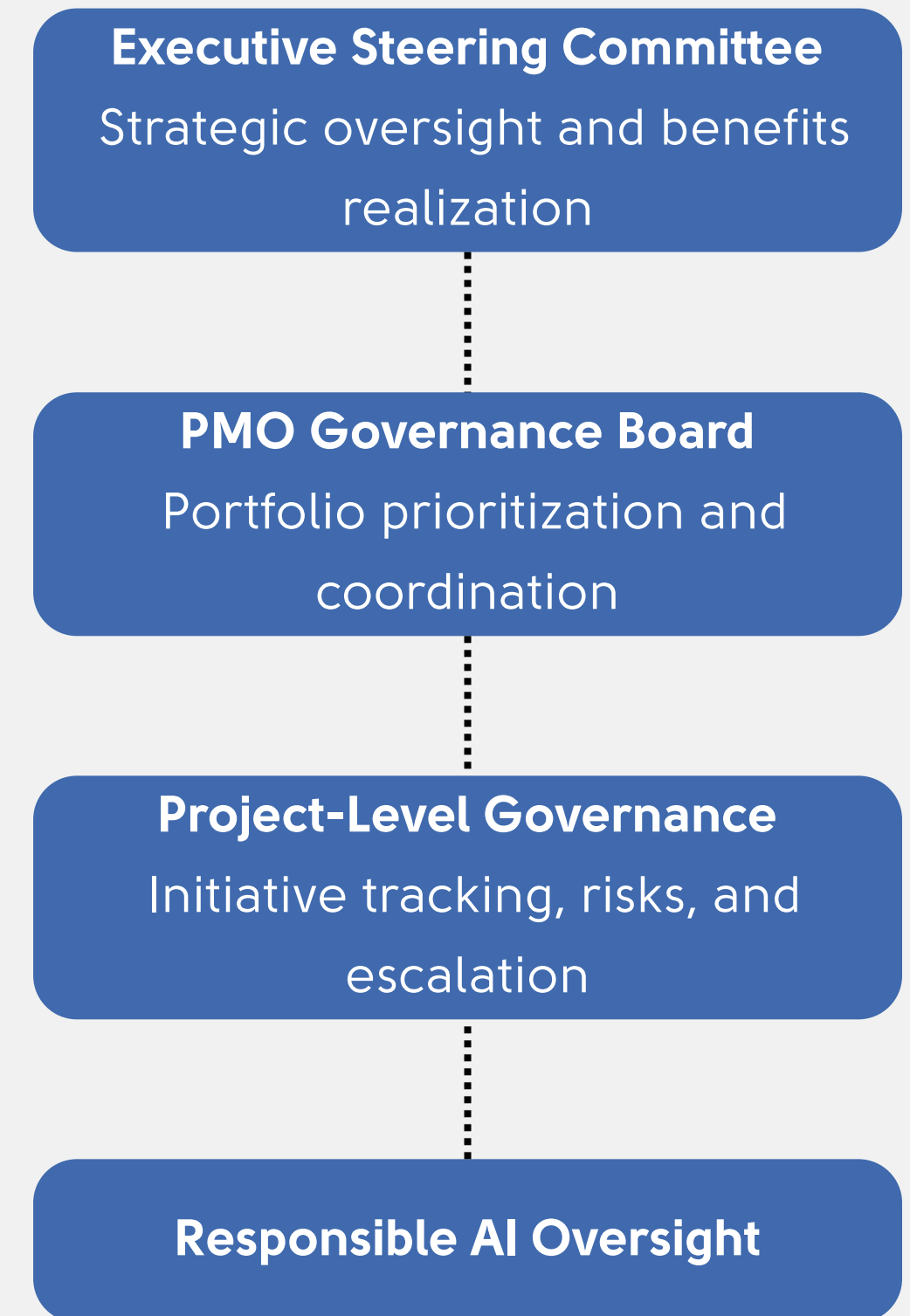
Project-Level Governance

- Weekly initiative tracking
- Risk & issue management
- Dependency monitoring
- Escalation pathways

Responsible AI Oversight

- Human-validated AI decisions
- Audit trails & transparency
- Regulatory compliance

Outcome: Governance evolves toward predictive, value-driven portfolio management.



¹ Project Management Institute. (2017). The Standard for Program Management.

² Microsoft. (2022). Responsible AI Standard.

AI Change Management

Our skilled team brings specialized knowledge and experience to evaluate and implement the best AI tools if deemed helpful during the discovery phase.



Change Vision & Objectives

- AI-enabled tools can aid in timeline, dependency, and risk visualization
- EmerGenetics can maintain a competitive edge and move confidently from its current state to a more efficient, scalable, streamlined, and strategically aligned future.

Stakeholder Identification & Engagement

- We have identified the key potential stakeholders at EmerGenetics and their associated concerns, needs, and engagement plans regarding AI tools (see Appendix A).
- These engagement plans can be updated as needed as we continue to collect feedback

Training & Co-Creation

- CoCr8 workshops: help stakeholders collaboratively ideate and learn how AI should be responsibly used within the PMO
- Encourage stakeholder feedback during the design and implementation stages of the AI-enabled tools

Support

- All stakeholders will have access to 24/7 IT support and reference materials that will help with any questions, such as compliance and procedures for different use cases.

Communication Strategy

- Clearly communicate standardized messages about the change vision and objectives, and how AI tools are supposed to serve as an aid, not a replacement.
- Encourage careful consideration of whether AI is truly helping the process, and not falling into the risk of dehumanizing decision-making (Bender, 2026).

Change Leadership

- Executive sponsor Joel Stridley and change champions will lead CoCr8 workshops with their associated teams and foster a culture of AI innovation, encouraging others to adopt it.
- They will also address their concerns and highlight the benefits of these AI tools to collaboratively encourage this transition (Stryker, n.d.).



AI Risk & Mitigation Strategy



Tool adoption resistance: Adopting AI tools due to unfamiliarity, fear, or preconceived notions of AI.

- Mitigation: Clear messaging about the efficiency benefits of AI. Transparent value metrics. Conduct early workshops, provide consistent IT support, and gather feedback, time, and tools to feel heard and supported (Prosci, n.d.).

Compliance concerns: data privacy, security, and other compliance risks.

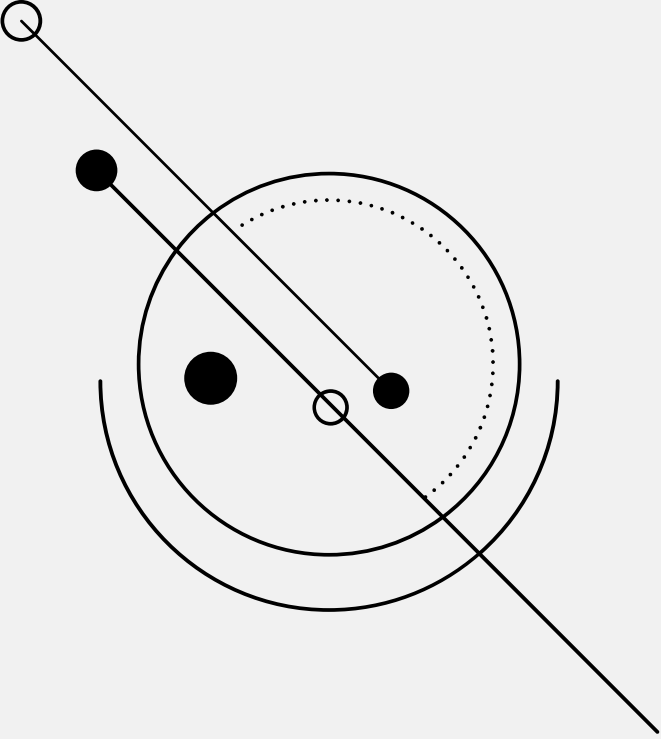
- Mitigation: Involve related teams throughout, build in legal / compliance KPIs, and ensure regulations for the AI tool are documented.

Clients/partners disliking AI: May change relationships with external collaborators or clients due to AI distrust, ethical risks, or sustainability concerns.

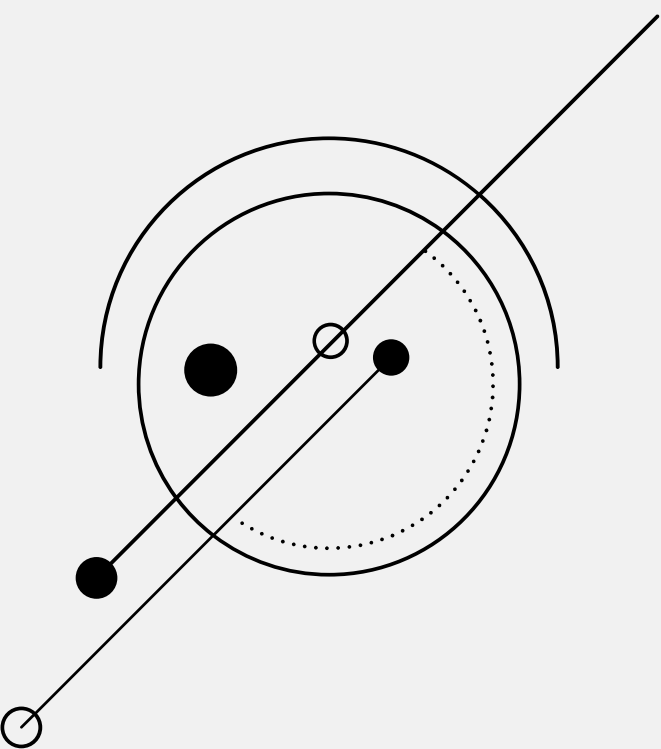
- Mitigation: Create clear and transparent documentation regarding how AI is utilized and acknowledge ethical considerations as well as how EmerGenetics is addressing them. This will include clearly communicating how EmerGenetics integrates responsible AI principles and human involvement in every step of the process. If the client would like a non-AI alternative during any process, this should also be an option.

Quality/integrity Issues: AI-generated insights or suggestions contain misinformation, errors, or hallucinations.

- Mitigation: Implement validation processes such as human checks and continuous monitoring to ensure accuracy of AI outputs. Sharing appropriate value-based metrics and results with stakeholders, including when we've stopped, building trust through transparency.



Qualifications and Past Performance



Why We're Qualified

- Combination of extensive healthcare experience, strong program management capability, and a collaborative approach that focuses on sustainable impact and scaling.
- **Our Co-Creation Model:** we work alongside internal teams to identify root causes, implement aligned processes, and build governance, decision frameworks, and performance capabilities

Past Experience #1: Transforming New Employee Onboarding

- Partnered on the HR hiring and onboarding process using a co-creation model and Value Stream Mapping with a cross-functional team
- Identified over 98% waste, creating opportunities to eliminate wait time and non-value-added work.
- Within 6 months, total lead time from job posting to employee start date was reduced by over 50%, and ongoing internal efforts have since improved it by over 75%
- Increased visibility, trust, and standardization of successful practices

Past Experience #2: Understanding Program Management System as a Strategic Capability

- Using the Iceberg model and collaborative workshops, we engaged leaders across the organization to identify systemic issues within a busy project management office
- Clarified root causes blocking business results, and developed a strategic plan to move from the current state to the desired future state.

Cost Proposal

PMO Staff Pricing

	Salary (per year)
PMO Director	\$210k
Program Manager	\$120k
OCM/QA Specialist	\$110k
Project Manager	\$105k

(Glassdoor, n.d.)

Smartsheet Pricing (Business Plan)

	Salary (per year)
Number of Licenses	8
Cost Per User Per Month	\$19
Total (Year)	\$1,824

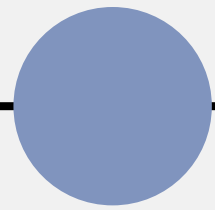
(Smartsheet, n.d.)

Cost Proposal

	Base Year	Option Year 1	Option Year 2
PMO Staff Cost	\$650,000	\$860,000	\$860,000
Smartsheet Cost	\$1,368	\$1,824	\$1,824
Consulting Cost	\$576,000	\$480,000*	\$384,000*
Total	\$1,227,368	\$1,341,824	\$1,215,824

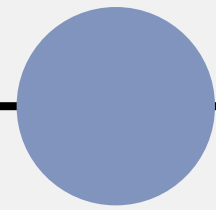
(Zipursky, 2025)

Next Steps



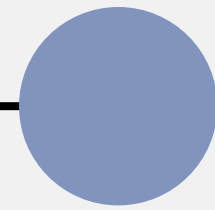
Clarification & Alignment

Address any follow-up questions, provide additional information as needed, ensure alignment on scope and expectations



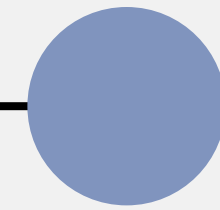
Finalize Contract

Confirm budget, deliverables (including value add from CoCr8 model), timelines, and any legal or technical terms of our partnership



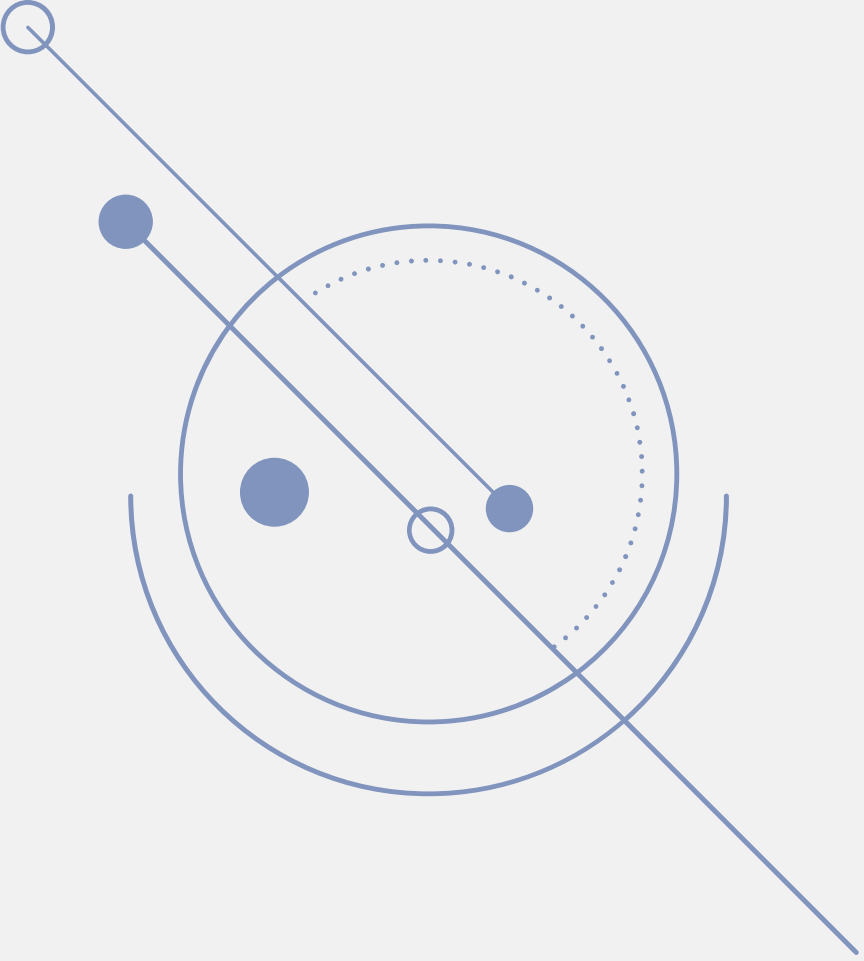
Discovery Phase

Conduct stakeholder interviews, assess current state and processes, and gather key insights to validate assumptions



Project Kickoff

Align teams on goals, communication plan, and refined project plan based on discovery findings



Thank You

We are looking forward to co-creating together!

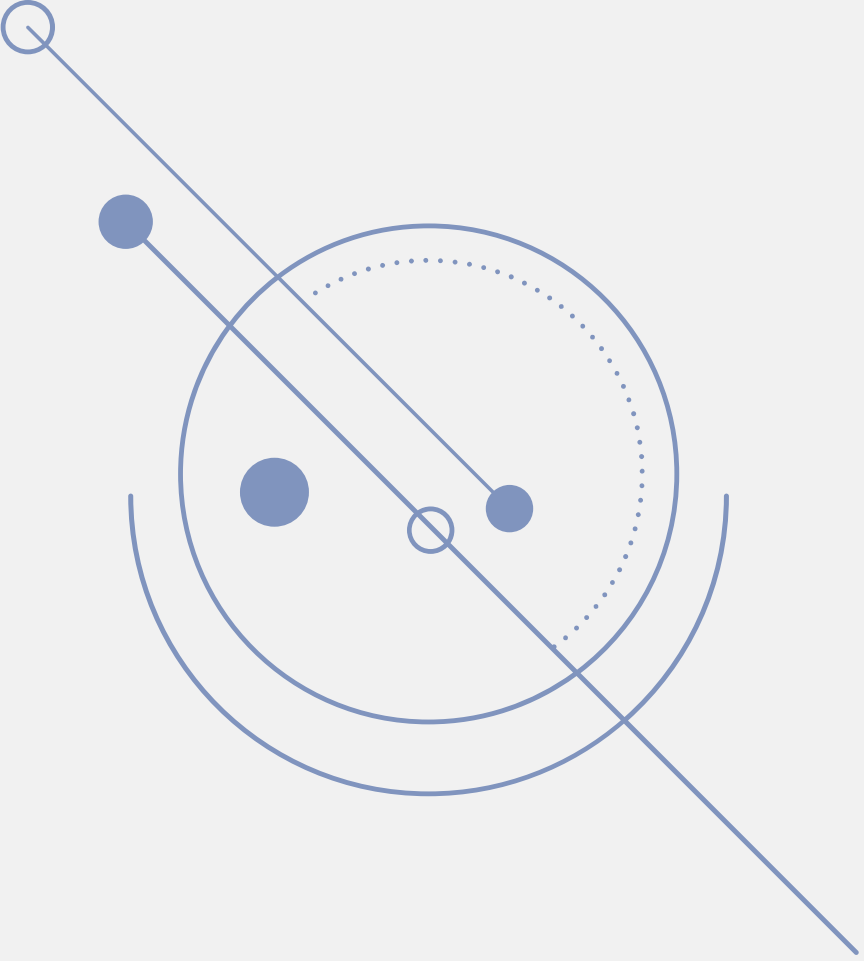


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Appendix

Appendix A – Stakeholders

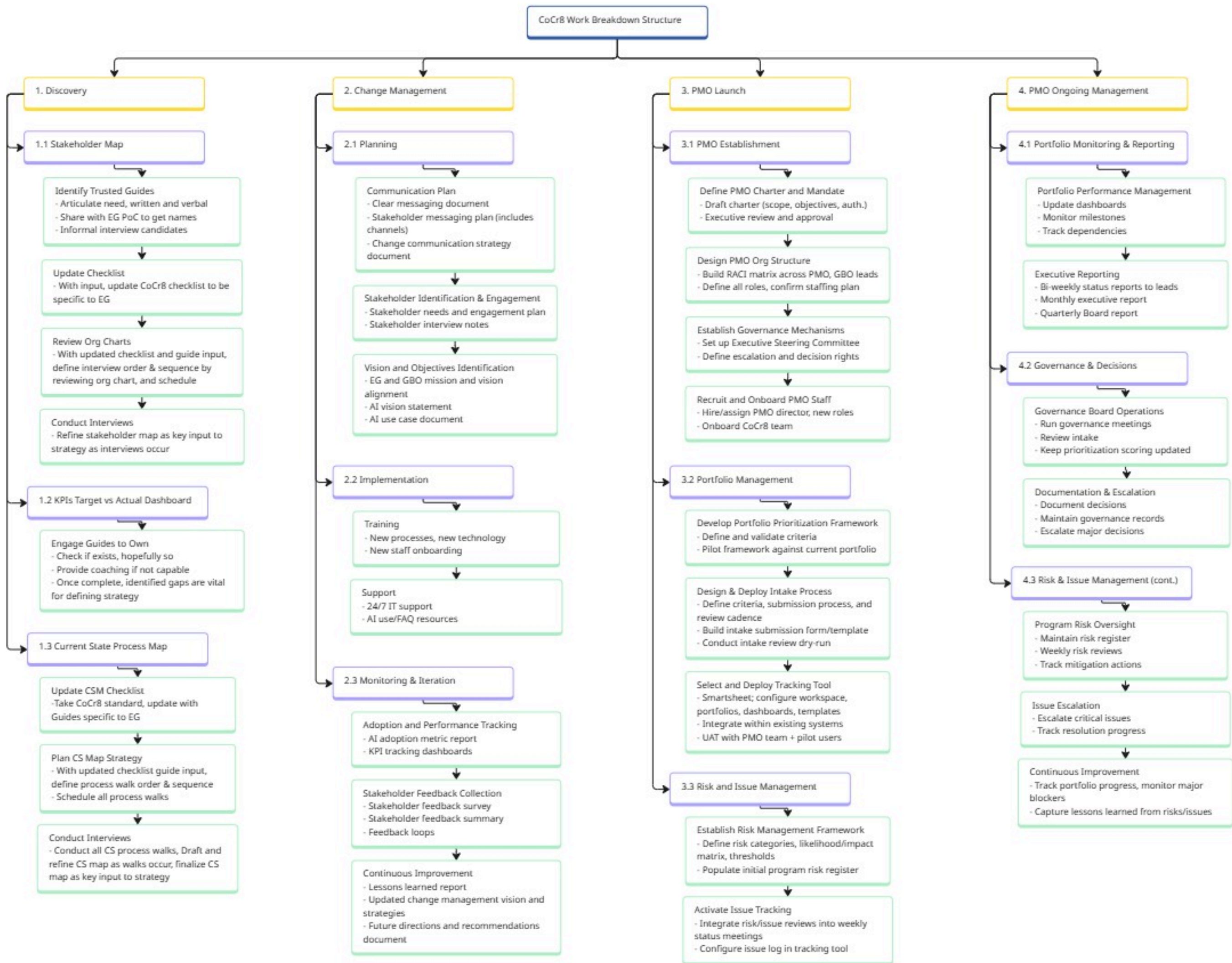
Stakeholder	Description	Concerns/Needs Regarding AI Tools	Engagement Plan
Executive leadership (e.g., Joel Stridley)	Leadership accountable for PMO implementation and organizational goals	<ul style="list-style-type: none"> <i>Concerns:</i> alignment with the organization's brand and strategic objectives <i>Needs:</i> visibility into timelines and decision-making support 	Executive AI briefings; AI performance dashboards; weekly milestone and goal alignment sessions regarding AI impact on the organization
GBO Team Members	Functional leads supporting GBO in sales, HR, IT, and more	<ul style="list-style-type: none"> <i>Concerns:</i> AI recommendations being inaccurate/misleading; usability of AI tools <i>Needs:</i> AI that does not override domain expertise 	Role-based AI trainings; provide proper documentation on the value of AI and how it will be used; regular structured feedback sessions
Program Management Office	PMO owners such as Program Sponsor, Program steering committee, Program manager	<ul style="list-style-type: none"> <i>Concerns:</i> AI recommendations being inaccurate/misleading/inconsistent across projects; AI resistance <i>Needs:</i> confidence in AI performance; proper governance on AI models 	CoCr8 workshops for AI implementation, rules, and more; Regular meetings to monitor the performance of the AI tool ensuring value is delivered and pivoting if not.
Project Managers	PM's executing projects under the new PMO	<ul style="list-style-type: none"> <i>Concerns:</i> AI recommendations being inaccurate/misleading; usability of AI tools <i>Needs:</i> Transparent use of AI and the ability to give feedback if something isn't working 	Role-based AI trainings; provide proper documentation on the value of AI and how it will be used; regular structured feedback sessions
Legal/ Compliance Team	Ensures privacy, compliance, and regulatory requirements	<ul style="list-style-type: none"> <i>Concerns:</i> Privacy concerns regarding AI data usage, audit trails, compliance/regulatory concerns <i>Needs:</i> Ability to audit, transparent AI usage, and compliance with AI privacy and governance standards 	Early meetings to evaluate the AI tools being considered, so that they can collaboratively conduct risk assessments, and regular compliance audits
IT Teams	Supporting the implementation and integration of the AI-enabled PMO tools and other technologies	<ul style="list-style-type: none"> <i>Concerns:</i> AI integration with existing systems/tools, security, scalability, data quality <i>Needs:</i> tools to monitor and test AI performance 	Early collaboration in AI implementation testing, ongoing AI monitoring and iteration, regular security reviews
External Customers or Collaborators	Clients/organizations that collaborate with EmerGenetics GBO	<ul style="list-style-type: none"> <i>Concerns:</i> data confidentiality, trusting AI recommendations <i>Needs:</i> transparency on the use of AI, understanding of EmerGenetics' security and accuracy standards with AI 	Transparent communication regarding AI usage and how the data is stored; feedback collection

Appendix B – WBS Index

1.0 Discovery	1.1 Stakeholder Map
	1.2 KPIs Target vs. Actual Dashboard
	1.3 Current State Process Map
2.0 Change Management	2.1 Planning
	2.2 Implementation
	2.3 Monitoring & Iteration

3.0 PMO Launch	3.1 PMO Establishment
	3.2 Portfolio Management Foundation
	3.3 Risk and Issue Management
4.0 PMO Ongoing Maintenance	4.1 Portfolio Monitoring & Reporting
	4.2 Governance & Decisions
	4.3 Risk & Issue Management (cont.)

Appendix C – WBS



Appendix C – WBS

Appendix D - Planning Workshop

TECHNICAL

Roadmap

Phase 1: PMO Establishment (0-3 Months)

- engage all relevant stakeholders (training & empowerment)
- inventory core business systems & processes
 - look for teams & leaders to leverage & ROOT CAUSES
 - measure current state
 - summary of findings & proposed PMO structure

Phase 2: Portfolio Management & Execution (4-9 months)

- process for identifying, tracking projects
- process for getting into the portfolio
- process for launch till to track & control initiatives
- process for reporting & reviews - risk issue mgmt.

Phase 3: Optimization & Transformation (10-12 months)

- pull data from previous phase
- analyze process loops + PDCA, ETECITE based on what's working + not
- GO/NO-GO CHECK TO EXTEND CoCR8 ENGAGEMENT

MANAGEMENT

CHANGE MGMT

- CoCR8 workshops + COMM/TANG. get staff engaged early + often
- widen circle w/ each iteration to get more staff involved

• Kotter's 8 steps.

• AI - smartest AI to support program mgmt as strat. capability

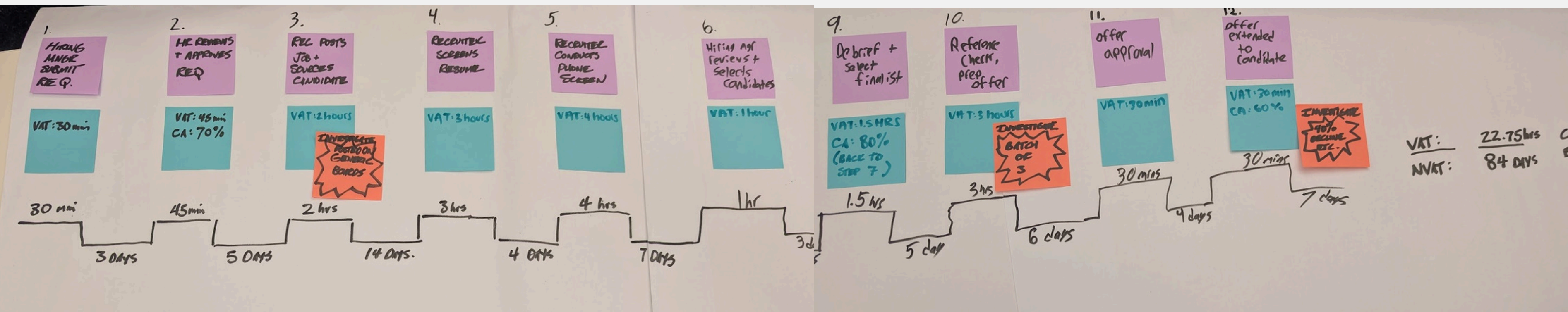
ONGOING

- LEFT V.R.G.
- 14 30/60/90 CHECKS
- TALK AS PROCESS RAMPING UP.

CONCERT

- PARALLEL MODEL TO
- A) ADD CAPACITY TO JANELY MUNCH + DISCOE
- B) "TRY TO PUSH"

Appendix E - Value Stream Mapping for our Previous Client



Appendix F – Emerging Tech and AI Rubric & SmartSheet Score

Evaluation Rubric for AI Tools

CoCr8 Consulting

Category	Elements	Weight	Score	Notes
Privacy & Security	1. Vendor visibility into data use (__); 2. How is data secured or encrypted (__); 3. Risk Assessment (__); 4. Clarity of patching and system update ownership (__); 5. SLA for break fixes (e.g. how close to real time 24/7) (__)	15		
Accountability & Transparency	1. All decision-makers and affected stakeholders can be clearly identified and engaged (__); 2. How clearly the system defines its intended uses, boundaries, assumptions, and known limitations to prevent misuse or over-reliance(__); 3. The extent to which potential impacts on people and systems have been identified and analyzed, and can be mitigated (__); 4. The presence and clarity of oversight processes, approval mechanisms, and assigned accountability (__); 5. How clearly the system’s decision-making logic, data sources, and design choices are documented and communicated to users (__)	15		
Accessibility & Fairness	1. The AI tool is fully usable by all intended users and meets established accessibility requirements (__); 2. The tool provides consistent performance without unnecessary downtime that could limit user access or functionality (__); 3. Any demographic or marginalized groups are not at risk of receiving lower-quality outputs, reduced accuracy, or diminished value (__); 4. The tool and its creators demonstrate active efforts to minimize bias, including the use of diverse datasets and fairness-oriented design practices (__); 5. Clear channels exist for reporting accessibility barriers or bias concerns and support mechanisms respond effectively (__);	15		
User Experience & Brand	1. The AI tool is intuitive and creates minimal navigation friction (__); 2. The AI tool improves task efficiency rather than adding operational burden (__); 3. Use of the AI tool results in measurable improvements in customer satisfaction and/or engagement (__); 4. Risk of reputational harm due to the use of this AI tool is minimized (__); 5. The AI tool reinforces and aligns with the organization’s brand values, credibility and positioning (__);	15		
Sustainability	1. The AI tool’s organization utilizes energy-efficient practices (__); 2. The AI tool’s organization is transparent about its carbon footprint and energy and water usage practices (__); 3. The AI tool’s organization has clearly defined sustainability goals and demonstrates measurable progress towards them (__); 4. The AI tool’s organization collaborates with sustainability organizations or researchers to validate claims and improve environmental impact (__); 5. The AI tool’s organization projects improved environmental impact over time (__);	10		
Integration	1. The AI tool easily interfaces with existing tools and processes (__ (0-4)); 2. Education/enablement needed to learn this AI tool is concise, intuitive, and useful (__); 3. This AI tool’s all up year 1 cost is below budget (\$250K) (__);	10		
Outcomes, Fit & Accuracy	1. Accuracy A: Trusted evidence of AI tool / model accuracy in other use cases (__ (0-4)); 2. Accuracy B: Level of confidence this AI tool / model’s accuracy will apply to our intended application (__ (0-4)); 3. Fit A: Level of confidence this AI tool / model fits our specific functional need (__ (0-4)); 4. Fit B: Zero concern that this AI tool / model requires I change the workflow in undesirable ways (i.e. doesn’t allow “form follows function”) (__ (0-4)); 5. Outcomes: Level of confidence this AI tool / model meets the expected outcome/ benefit of the specific process step (__ (0-4));	20		
Total Score		100%		

Scores of PM AI Systems

CoCr8 Consulting

Category	Weight	Asana AI	Smartsheet AI	Notes
Privacy & Security	15	12	15	Smartsheet scored higher because it showed stronger clarity in vendor data visibility, risk governance, and system maintenance responsibility.
Accountability & Transparency	15	12	13	Smartsheet scored higher because of clearer stakeholder traceability, defined oversight structures, and stronger articulation of intended system boundaries. Both did good, however Smartsheet had stronger governance maturity aligned with responsible AI principles.
Accessibility & Fairness	15	12	10	Asana scored higher due to its stronger accessibility compliance and having a more mature user support and reporting channels.
User Experience & Brand	15	12	11	Asana scored higher because of its intuitive interface, lower learning curve, and stronger alignment with productivity-driven workflows.
Sustainability	10	12	4	Asana scored better because they meet sustainability signals (ex: clearer sustainability reporting, stronger ESG commitments, more transparency around environmental practices, or stronger public documentation).
Integration	10	12	9	Asana edges Smartsheet on “plug-and-play” adoption.
Outcomes, Fit & Accuracy	20	12	17	Smartsheet wins where it matters most: PMO outcomes + portfolio fit.
Total Score	100	76	79	