

CLIENT PLAYBOOK

PMO Recovery Control Room

A client-facing playbook for stabilizing late, under-documented, or commercially exposed projects and portfolios in 30 days.

Designed for	PMO leaders, project executives, sponsors, delivery owners, and commercial stakeholders
Use when	The baseline, forecast, ownership model, evidence trail, or client commitments are no longer credible
Primary outcome	A factual control position, bounded recovery mandate, protected commitments, and a path back to normal governance

How to Offer This Playbook

This playbook turns a PMO recovery conversation into a bounded, evidence-led client engagement. It is written so a client can self-assess the need for recovery, understand the first 30 days, and see where InsightVector adds control, facilitation, and executive decision support.

Client promise	Recovery begins with a factual control position, not a new status narrative. The work protects the next commitments while leaders decide what must continue, change, stop, or be reauthorized.
-----------------------	--

Offer component	Client-facing value	Typical evidence produced
Recovery readiness check	Determines whether current governance can still support decisions.	Activation test, sponsor risk note, immediate protection list
Fact-base sprint	Separates known facts from assumptions across scope, schedule, cost, change, evidence, and billing.	Contract map, milestone view, exposure register, evidence request log
Decision reset	Converts ambiguity into explicit instructions for priority, authority, funding, scope, sequencing, and risk.	Decision log, stop/start list, client decision plan
Control-room cadence	Runs short-horizon execution until commitments, reporting, and commercial records reconcile.	10-day action board, sponsor brief, client record, billing readiness view
Governance handoff	Transfers recovery controls into normal operating rhythm.	Approved baseline, owner map, exit test, residual risk list

Recommended Engagement Shape

Engagement	Best fit	Duration	Output
PMO Recovery Review	Leaders need a fast view of control credibility.	3 to 5 business days	Activation findings, commitment protection plan, recovery mandate options
30-Day Recovery Control Room	A project or portfolio needs intervention and visible executive cadence.	4 weeks	Integrated recovery register, decision reset, sponsor briefs, exit handoff
Recovery Governance Retainer	The client has recurring delivery risk and needs sustained controls.	Monthly	Operating reviews, evidence checks, change and billing exposure discipline

Activate Recovery When Control Is No Longer Credible

A recovery plan is warranted when leaders cannot rely on the current baseline, forecast, ownership model, or evidence trail to make the next decision. The goal is not to make the status report look better. The goal is to restore the decision system.

Signal	Recovery trigger	Client question
Baseline	Dates, scope, or cost targets are no longer credible or not approved.	What is the current authorized baseline, and who accepts it?
Commitments	The team cannot distinguish committed, forecast, disputed, and optional work.	Which promises are contractual, which are targets, and which are assumptions?
Decisions	Critical decisions lack an owner, due date, rationale, or consequence.	What decision debt is blocking delivery or commercial protection?
Commercial	Unapproved work, acceptance gaps, or billing delay is accumulating.	Where work is being performed without clear authority or invoice readiness?
Evidence	Status requires manual reconstruction across email, meetings, and disconnected files.	What record would prove progress, acceptance, change, or billing?
Confidence	Sponsor, client, and delivery reports do not reconcile.	Which version of the truth should leaders use this week?

Recovery rule

Do not rebaseline until the fact base, remaining obligations, decision rights, and change in exposure are understood. A new date without a controlled path only resets the problem.

First 48 Hours: Stabilize

- Name one executive sponsor and one recovery lead with authority to convene owners and escalate decisions.
- Freeze uncontrolled scope additions and nonessential configuration changes while preserving safety and mandatory operations.
- Create a single recovery register for actions, decisions, risks, issues, changes, and evidence requests.
- Confirm the next five contractual, operational, and financial commitments.
- Issue a fact-based sponsor note: current position, immediate protections, unknowns, owners, and next review.

The Recovery Sequence

Each phase has a decision outcome. Advance when the required evidence is ready, not because time has elapsed.

Days	Phase	Minimum output	Exit decision
0-2	Stabilize	Authority, single register, protected commitments	Sponsor accepts recovery control structure
3-5	Establish fact base	Contract/scope map, integrated milestone view, cost and change exposure	Known facts are separated from assumptions
6-10	Reset decisions	Priorities, stop/start choices, owners, tolerances, client decision plan	Decision debt is reduced and work instructions are clear
11-20	Execute recovery	Short-horizon plan, constraint removal, evidence capture, billing protection	Critical path and commercial exposure are moving
21-30	Rebaseline and hand off	Approved baseline, operating cadence, control owners, acceptance evidence	Recovery controls transfer to normal governance

Recovery Workstreams

Workstream	Control question
Governance	Who owns sponsor authority, recovery leadership, decision rights, tolerances, forums, and escalation?
Scope / contract	Which obligations, exclusions, assumptions, acceptance terms, notices, and pending changes control the work?
Schedule / resources	What remaining logic, dependencies, constraints, capacity, and short-horizon commitments are real?
Cost / forecast	How do actuals, commitments, remaining effort, estimate at completion, and funding decisions reconcile?
Risk / change	What exposure, approval status, disputed work, contingency trigger, and response is active?
Evidence / quality	What proves deliverable status, defects, review comments, acceptance, and client communications?
Billing / cash	Which billable events, missing evidence, invoice readiness issues, disputes, and collections need owners?

Discovery and Facilitation Guide

Use this section to run the first client workshop and convert concern into a controlled recovery mandate.

Agenda block	Purpose	Prompt
Opening position	Establish why the current control position is unreliable.	What decision can leaders not make confidently today?
Commitment scan	Identify the next promises that require protection.	What are the next five dates, approvals, billing events, or client-facing commitments?
Evidence walk	Separate status narrative from usable proof.	What record proves completion, acceptance, change authority, or invoice readiness?
Decision debt review	Find the decisions that are creating delay or exposure.	Which unresolved decisions change priority, cost, scope, sequence, or risk response?
Recovery mandate	Define the bounded authority for the next 30 days.	Who can instruct, approve, stop, escalate, and communicate externally?

Inputs to Request Before the Workshop

- Executed contract, SOW, amendments, change orders, notices, acceptance terms, and payment milestones.
- Current schedule, task records, dependency view, resource plan, and last approved baseline.
- Budget, actuals, commitments, estimate at completion, billing status, invoice disputes, and collection actions.
- Decision log, meeting notes, risks, issues, assumptions, open client requests, and escalation history.
- Deliverable repository, review comments, defect list, quality evidence, acceptance artifacts, and client communications.

Facilitator stance	Keep the room anchored to usable evidence and executive decisions. When disagreement appears, capture the disputed item, owner, due date, consequence, and next evidence request.
---------------------------	---

Build a Fact Base Leaders Can Use

The recovery baseline is a decision instrument. It should reconcile what was promised, what has occurred, what remains, and what authority is required.

View	Minimum facts	Primary evidence
Contract position	Executed scope, amendments, notices, milestones, payment and acceptance terms	Contract, SOW, amendment, and change documents
Delivery position	Completed, in progress, blocked, not started, rejected, and rework	Schedule, task records, deliverables, and quality records
Financial position	Budget, actual, committed, remaining, forecast, and billing exposure	Finance and project reconciliations
Decision position	Open, overdue, disputed, assumed, and superseded decisions	Decision log and meeting evidence
Change position	Potential, priced, submitted, approved, rejected, and disputed changes	Change register and authorization evidence
Evidence position	Available, missing, stale, inconsistent, and client-controlled evidence	Approved repository and links

Commitment Protection Worksheet

Control	Recovery entry
Commitment / date	
Current confidence	High / Medium / Low and why
Constraint	
Decision required	Owner / due / consequence
Evidence required	
Client communication	Sender / date / approved message

Reset Decisions, Then Execute

Recovery converts ambiguity into explicit instructions. Each decision should change ownership, priority, funding, scope, sequencing, or risk response.

Instruction	Minimum meaning
Continue	Work remains authorized and resourced under the current instruction.
Accelerate	Additional resource or sequencing action is approved with cost and risk impact.
Defer	Work is moved with dependency, client, and commercial consequences recorded.
Descope	Obligation is removed through approved contract or governance authority.
Change	Impact is evaluated and routed for the required approval before execution.
Stop	Work is paused with safe-state, evidence, notice, and restart conditions defined.

Short-Horizon Execution Board

#	Outcome / action	Owner	Due	Blocker / decision	Done evidence
1					
2					
3					
4					
5					
6					
7					

Minimum Daily Discipline

- Review only the next 10 working days and the next contractual or billing gate.
- Close completed work only when the agreed evidence exists.
- Escalate decision aging, resource conflicts, and unapproved change exposure.
- Reconcile action, schedule, change, and billing records before publishing status.

Run a Control-Room Cadence

Use the smallest cadence that produces timely decisions and reconciled evidence.

Forum	Participants	Agenda	Output
Daily 15 min	Recovery lead and workstream owners	New blockers, due decisions, 10-day actions, evidence gaps	Updated recovery register
Twice weekly	Controls, finance, contract, delivery	Schedule, cost, change, and billing reconciliation	One fact base and exception list
Weekly sponsor	Sponsor, recovery lead, decision owners	Decision requests, forecast, exposure, client commitments	Approved instructions and escalations
Client cadence	Authorized client representatives	Contractual progress, decisions, acceptance, changes	Dated client record

Weekly Sponsor Brief: One Page

Section	Required content
1. Control position	One sentence: stable, improving, deteriorating, or decision-blocked - with evidence.
2. Commitments	Next three milestones, confidence, and exceptions.
3. Forecast	Current completion and cost view; variance from prior week.
4. Exposure	Top scope, change, risk, evidence, billing, and client items.
5. Decisions	Decision, owner, due date, options, and consequence of delay.
6. Progress	Actions completed with evidence; actions missed and recovery instruction.

Client Worksheets and Registers

Use one controlled register or linked system records. Avoid competing spreadsheets with different status definitions.

Decision and Issue Log

#	Type / description	Owner	Due	Impact / option	Decision / evidence
1					
2					
3					
4					
5					

Change Exposure Register

#	Change / cause	Status	Schedule	Cost / billing	Authority / next
1					
2					
3					
4					
5					

Evidence Request Log

#	Record / purpose	Owner	Due	Location / status
1				
2				
3				
4				

Protect Billing, Acceptance, and Client Communications

Recovery work should protect commercial position while delivery stabilizes. The recovery team should not wait until the project is healthier to reconcile acceptance evidence, change authority, and invoice readiness.

Control	Why it matters	Recovery action
Acceptance evidence	Completed work may remain commercially weak if acceptance is not documented.	Map every billable or contractual gate to required proof and owner.
Change authority	Unapproved work can absorb capacity and create disputes.	Classify work as authorized, pending, disputed, optional, or stopped.
Billing readiness	Cash and margin protection depend on dated, reconciled records.	Review invoice events, missing documents, disputes, and collections twice weekly.
Client communications	External promises can create new exposure if they repeat unsupported dates.	Approve messages through the recovery lead and sponsor before commitments are repeated.
Residual risk	Recovery may reduce exposure without eliminating it.	Assign owner, trigger, due date, and escalation path to every remaining exposure item.
Reporting test	A sponsor should be able to see what changed, why it matters, who must decide, and whether the project can protect its next commitment. Detail that does not support those decisions belongs in the control records.	

Exit Recovery Deliberately

Recovery ends when normal governance can maintain the controls - not when the reporting color changes.

Control	Exit test	Result
Authority	Sponsor, project manager, and control owners accept decision rights and tolerances.	Yes / No
Baseline	Scope, schedule, and cost baseline is approved, dated, and reconciled.	Yes / No
Forecast	Completion, cost, and resource forecasts have an agreed method and cadence.	Yes / No
Change	All material changes have an explicit status and work instruction.	Yes / No
Evidence	Deliverable, acceptance, and billing evidence is current and accessible.	Yes / No
Cadence	Forums produce decisions, actions, and reconciled reporting without the recovery team.	Yes / No
Commercial	Invoice readiness, disputes, and collection actions have named owners.	Yes / No
Residual risk	Open exposure has an owner, trigger, due date, and escalation path.	Yes / No

30-Day Outcome Statement

Prompt	Response
Control restored	
Remaining exposure	
Approved baseline date	
Normal governance owner	
Next executive decision	

How to Use This With Clients

Moment	Recommended move	Client-facing language
Initial conversation	Offer the activation test and ask for the next five commitments.	Let us determine whether the current controls can support the next executive decision.
Proposal	Package the work as a bounded recovery review or 30-day control room.	The engagement restores a factual control position before any rebaseline is recommended.
Kickoff	Agree authority, evidence access, communication rules, and daily cadence.	We will separate facts from assumptions and protect near-term commitments first.
Sponsor review	Present options, consequences, and decision aging.	Here is what changed, why it matters, and what requires sponsor instruction.
Closeout	Transfer controls, owners, cadence, and residual risk to normal governance.	Recovery is complete when the controls can operate without the recovery team.

Next step

Use this playbook in an InsightVector PMO Recovery Review to validate the fact base, protect the next commitments, and define a bounded recovery mandate.

This playbook is a management aid. Contract, safety, legal, financial, regulatory, and client-specific obligations take precedence. Tailor the controls to each client environment, system of record, contract structure, and risk profile.