

FRACTIONAL PMO · B2B SAAS

Service Catalog

The implementation leader your startup needs
before you can justify the headcount.

Osorio & Partners

Audit · Embed · Hand Off

osorioandpartners.com

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ABOUT THE FIRM

We take the seat. We don't hand you a binder.

Osorio & Partners is a fractional PMO practice built for B2B SaaS startups between Seed and Series B. We bring enterprise-grade delivery discipline without the enterprise overhead, bureaucracy, or price tag. We bring it as an operator in the work, not a consultant presenting findings from the outside.

12+

YEARS DELIVERING

\$30M+

PROJECTS MANAGED

Day 1

READY TO ENGAGE

2

LANGUAGES

WHY WE EXIST

Funded startups over-invest in sales, product, and engineering while implementation operations go unowned. The pattern is consistent: the deal closes, and then nobody is quite sure who runs onboarding. Timelines slip. The founder or the AE absorbs the work. Billing starts late. Every new client is improvised from scratch.

Hiring a full-time implementation leader solves it, but most companies at this stage can't justify the salary or don't yet have the volume. The gap between "nobody owns this" and "we made a senior hire" is where we work.

Our thesis is that implementation operations are a revenue lever, not an overhead cost. Every week a client implementation is delayed is a week of revenue deferred. Compressing that timeline isn't an operational nicety. It's an investment with measurable return.

What we are not: a large management consultancy, a staffing agency, or a freelancer taking whatever work comes. One practice, one focus, a deliberately small number of clients at a time.

ENGAGEMENT PATH

One path, three steps

Every engagement starts with the audit. Nothing else is sold cold.

01 Implementation Readiness Audit

2-3 WEEKS · FIXED FEE

We trace how a client actually moves from signed contract to live and billing. You get a written findings report and a prioritized roadmap, yours to keep and act on with or without us.

02 Fractional PMO

MONTHLY RETAINER · SIX-MONTH MINIMUM

We take the implementation seat a defined number of days per month and run the roadmap. Live onboardings, escalations, and the sales-to-delivery handoff become owned work rather than everyone's second priority.

03 Advisory

LIGHTER MONTHLY RETAINER · ONGOING

Once the system runs itself or a full-time lead is in place, we step back to a standing thought-partner role. Continuity without occupying the seat.

WHY THE AUDIT COMES FIRST

A six-month retainer is a real commitment, and neither of us should make it on a first call. The audit is a small, bounded way to find out whether the problem is what you think it is, and whether we work well together. Roughly half the value of the engagement is delivered before you decide anything.

SERVICES

What we offer

Three engagements. The audit opens the door, the seat does the work, and the build stands up the system.

01 Implementation Readiness Audit

A structured diagnostic that baselines how clients move from signed contract to live and billing. We interview the people doing the work, read the tickets, and find where deals sit idle, then deliver a prioritized roadmap with owners and sequencing. Fixed fee, credited against the first month if you continue.

DELIVERABLES

- Stakeholder interviews
- Onboarding process trace
- Time-to-billing analysis
- Written findings report
- Prioritized roadmap

OUR APPROACH

- Start with what you have
- Follow real deals, not diagrams
- Talk to ICs, not just leadership
- No outside framework imposed

SUCCESS LOOKS LIKE

- Root causes named specifically
- Roadmap accepted by leadership
- Sequencing agreed with owners
- Actionable with or without us

02 Fractional PMO

Our core engagement. We take the implementation seat a defined number of days per month and run it. That means live client onboardings, escalations, the handoff between sales and delivery, and the internal decisions nobody currently owns. Your AE closes the next deal instead of babysitting the last one.

WHAT WE OWN

- Client onboarding execution
- Sales-to-delivery handoff
- Escalation management
- Cross-team communication
- Executive status reporting

HOW WE WORK

- Four days per month, base
- Eight-day tier when standing up
- Six-month minimum term
- Priorities reset monthly
- In your tools, not ours

SUCCESS LOOKS LIKE

- Time-to-billing compressed
- Consistent client onboarding
- Escalations caught early
- Founder time returned

SERVICES, CONTINUED

The system underneath

03 PMO Build

A working project portfolio management system, built in Smartsheet. It's cost-effective, quick to learn, and robust enough to run complex programs with real automation. Scope is fixed before we start: project types, user seats, and report views are named in the statement of work. Sold on its own or delivered inside the seat.

DELIVERABLES

- Portfolio and project structure
- Intake and prioritization forms
- Automated status reporting
- Leadership dashboards
- Team training and handoff

OUR APPROACH

- Fixed scope, fixed fee
- Configured to how you work
- Automation over manual updates
- Your team owns it at handoff

SUCCESS LOOKS LIKE

- Live and in use at handoff
- Maintained without us
- One view leadership trusts

INSIDE THE SEAT

What the retainer actually covers

Four practice areas. These describe the job. They are not sold separately.

01 Implementation ownership

Live onboardings, the sales-to-delivery handoff, escalations, and executive reporting. The seat itself, not a deliverable.

02 Process architecture

Lifecycle design, intake and prioritization, cross-functional decision rights, and ownership mapping that survives turnover.

03 Systems and tooling

Project tracking, reporting cadence, tool evaluation and vendor negotiation, and lightweight internal applications where a spreadsheet has stopped working.

04 Documentation and handoff

The lifecycle playbook, templates, and handoff package, written from implementations we ran together, for whoever you hire full-time.

FIT

Who this is for

We work with a deliberately small number of clients at a time. That means being honest about fit in the first conversation.

A GOOD FIT

- Seed through Series B B2B SaaS
- 10–100 employees
- Recently funded, or just landed a first enterprise client
- Product-market fit reached; delivery is now the constraint
- No dedicated implementation function
- Leadership willing to let someone own the process

PROBABLY NOT A FIT

- Pre-product-market fit
- Already have a strong implementation leader
- Looking for staff augmentation or a body to fill a seat
- Want a deck rather than a change in how work runs
- Need month-to-month rather than a six-month term
- Enterprise-scale formal PMO governance

ABOUT THE PRINCIPAL

Osorio & Partners is led by Joseph Osorio, Founder & Principal. Twelve-plus years in project management and more than \$30M in delivered projects across public sector, legal, government technology, and data center infrastructure, including the Chicago Housing Authority, Monster Government Solutions, Sidley Austin LLP, and Flexential. Fully bilingual in English and Spanish. Engagements are delivered personally, not subcontracted.

Start with the audit.

Find out what is actually slowing implementations down, and get a roadmap you keep either way.

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