Implementing a Project Portfolio Management (PPM) Solution

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Agenda

• Introductions
• First – Fresh from Microsoft Ignite
• Why Implement a PPM Tool (recap)
• Are You Ready for a PPM Implementation?
• Implementation Approach
• Innovation Delivered: Sample Solutions
• Questions and Closing
Introductions
Please Introduce Yourself
Considering or already have a PPM Tool?

Magic Quadrant for IT Project and Portfolio Management Software Applications

Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services
But First... There’s More

Meet the newest members of the Office family

and some old favorites
Sway: http://aka.ms/StorytellingIgnite2015
Mix: https://mix.office.com/
Delve: http://bit.ly/1zEwMHk
Office 365 Video: http://bit.ly/1xjEQy3
A Brief Recap...

Why Implement a PPM Tool?
Typical Business Environment

Collecting and analyzing the required information and data is hard.

Information is in
- Different places
- Different Systems
- Different Formats

Aggregating and acting on the information can be a challenge
How do Tools Work?

Task Example

PMO

- Portfolio Management / Dashboard

Resource Managers

- Capture Resources details and skills
- Perform resource demand & supply view

Project Managers

- Provide project status data

Team Members

- Record time and expenses for project cost
PPM Delivers Value

-10%

Reduction of low-value projects

-25%

More effective time usage and less overhead

-15%

Reduced project failures

-10%

Reduced cost overruns

+10%

Improved resource utilization

Source: Forrester Research, Inc.
Capability Maturity Model

80% of PMOs are below level 3

Source: Gartner
Are you ready for a successful PPM Implementation
Conduct a Readiness Assessment

BEFORE you select a vendor or a tool

- Executive buy-in
- Project and process management
- Performance benchmarks
- Organization structure
- Credibility of source
- PPM staff
- Technology

Your answers to these questions will create a solid foundation for seeking and selecting an appropriate approach, tool and/or vendor who can craft the right services for your specific engagement.
## Consider Your Capabilities

Where are you now and where do you want to be

<table>
<thead>
<tr>
<th>Level 1 Ad-Hoc</th>
<th>Level 2 Emerging</th>
<th>Level 3 Managed</th>
<th>Level 4 Integrated</th>
<th>Level 5 Optimized</th>
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<tr>
<td><strong>Process / Organization</strong></td>
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<tr>
<td>• Reactive project selection process</td>
<td>• Standard PM framework implemented</td>
<td>• Cyclical project intake process</td>
<td>• Organization-wide PPM processes</td>
<td>• Innovation-centric PPM processes</td>
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<td>• No consistent PM framework across projects</td>
<td>• Project prioritization against strategy</td>
<td>• PMO roles well-defined</td>
<td>• EPMO/multiple business unit PMOs</td>
<td>• EMPO owns strategy/project execution</td>
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<td>• Basic budget estimates/tracking</td>
<td>• ‘Bottom-Up’ resource mgmt</td>
<td>• Emerging EPMO</td>
<td>• Portfolio results actively tracked</td>
<td>• Sophisticated financial mgmt</td>
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<td>• Resource bottlenecks</td>
<td>• PMO created</td>
<td>• ‘Top-down’ resource planning</td>
<td>• Center of Excellence</td>
<td>• Role specialization/career paths</td>
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<td>• Limited risk mitigation</td>
<td>• Project costs/hours</td>
<td>• Portfolio analysis/monitoring</td>
<td>• Resource mgmt optimized</td>
<td>• Enterprise-wide frameworks/best practices</td>
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<td>• No portfolio mgmt.</td>
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<td>• Value-based estimates</td>
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<td>• Chargeback/financial integration</td>
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<td><strong>Tools</strong></td>
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<td>• Uncoordinated spreadsheets</td>
<td>• Resource mgmt</td>
<td>• Resource ‘what-if’ analysis</td>
<td>• Advanced financial management</td>
<td>• Integration to enterprise knowledge-management</td>
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<tr>
<td>• MS Project</td>
<td>• Project workspaces</td>
<td>• Portfolio analysis</td>
<td>• Advanced risk analysis/modeling</td>
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<td></td>
<td>• Exec dashboards</td>
<td>• Configurable processes/workflow</td>
<td>• Portfolio modeling</td>
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<td></td>
<td>• T&amp;E Tracking</td>
<td>• Enterprise administration</td>
<td>• Custom development</td>
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<td></td>
<td>• Standard project templates</td>
<td>• Advanced BI</td>
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<td></td>
<td>• Simple configuration</td>
<td>• Integration to ERP/CRM</td>
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<td></td>
<td>• Single data store</td>
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<td></td>
<td>• Business intelligence (BI) reporting</td>
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### Determine What is Important

Rank 5-10 Critical Success Factors, such as:

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<th>Selection Criteria</th>
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| 1. Implement a project intake process to prioritize and select strategic projects       | Core PPM Functionality: Portfolio Management, Project Intake  
Professional Services / Support: PPM process consulting |
| 2. Successful adoption by project teams                                                 | Usability: Simple, intuitive web-based interface  
Technology: Software-as-a-Service delivery |
| 3. Real-time executive reporting / visibility into project and portfolio status          | Business Intelligence: Dashboards and Views  
Business Intelligence: Single data store |
| 4. Ability to tailor PPM solution for existing and new business processes                | Functionality: Import spreadsheets / project templates  
Configuration: Easily add custom data fields  
Configuration: Configure new processes  
Business Intelligence: Build role-based reports and views |
| 5. Improve PPM process maturity from Level 1 to Level 3                                  | Customization: Solution templates  
Professional Services / Support: PPM best practices web-based training |
| 6. Reduce administrative overhead for reporting and data visualization                  | Business Intelligence: Single data store  
Business Intelligence: Build role-based reports and views  
Usability: Simple interface for creating reports |
| 7. Improve collaboration / communication between project teams                           | Core PPM Functionality: Project workspaces  
Core PPM Functionality: Workflow |
| 8. Improve resource planning and utilization                                            | Core PPM Functionality: Resource Planning |
Lessons from the Trenches

Implementation Approach
How we did it...

- University of California Davis
- California Department of Corrections: *Facilities Planning and Construction Management*
- Vanir Construction Management
- Kiefer Consulting, Inc.
Perform Initial Groundwork

Leverage the inputs from the readiness assessment

• Review where you are and where you can go realistically
• Cull best practice recommendation and further refine your business justification
• Identify the areas of greatest need.

The results will help you make the case for PPM and determine the PPM approach that will be appropriate for your specific situation.
Deployment Planning

• Develop a roadmap that outlines
  – Time to deploy the tool for your organization,
  – Deployment activities,
  – Deliverables,
  – Training, and
  – Resources needed for successful deployment

• Create a Project Charter
  – Vision, scope, roles, resources, and communications plan for your team
  – This is where the overall schedule is established, milestones are agreed upon and progress review criterions are set in place
  – Highly recommend a phased implementation
Develop a Usage Model

• Define how each identified role on your team (executive, PM, programmer, etc.) should use the tool.
• Work closely to design the processes and metrics in order to create a usage model design document.
• The requirements document created here becomes the foundation of the configuration activities.
• How do you measure success for each?
• What does “done” look like
Buy or Build or Hybrid?

• PPM Market is moving to the cloud
• Most Tools are great in one area, but lacking in others
• Configurable solutions are convenient,
  – Implementation is quick
  – Do not require effort on your part to design a custom model
• Custom solutions are much more flexible
  – require detailed design
  – technical resources
  – longer-term projects
• Consider tools implemented on platforms that can more easily "grow" as the user organization gains experience and understanding.
Phased Rollout

Start with one team, but quickly embrace everyone

- Develop Training Material
- Host Lunch-n-Learns to promote buy-in as there will be change
- Set realistic expectations, and be very clear about roles.
- Signal types of change to be expected, and communicate the value to be gained from achieving such changes.
- Expect some resistance from project managers.
Continuous Process Improvement

How do you eat an elephant?

Effective PPM needs to be a living process within your organization.

• Do a thorough "lessons learned" review following the first full-scale deployment.
  – Involve senior managers in the assessment.
  – Keep what worked, change what didn't work, and learn to do it faster, better, and more efficiently.

• Review and Update your original roadmap to layer in new features over time
Demonstration

• BrightWork @ Kiefer Consulting
  – SharePoint Based Tool
  – Project site
  – Portfolio view
  – Resource view

• Custom Build for Vanir Construction Management
  – Project Site
  – Dashboards
  – Reports
Questions and Closing
What are we going to sell?

SharePoint
Leading Solution Provider in Northern California
Over 40 Customer Success Stories
Custom Solution Accelerators
Complete Lifecycle Services

.NET
Over 200 custom solutions and integration projects
Custom framework components to expedite delivery
Legacy, n-Tier and web architecture & development services

CRM
Case Management, Contact Center and G2C Solutions
Rapid application development
Business process management
Business Intelligence
Familiar office and web user experience

Mobile
Cross-platform solutions and services
Proven design patterns for web, embedded and native solutions
Top 100 App in the Apple AppStore

Enterprise Data Architecture – *align and integrate across solutions, environments and platforms*

Proven Methodology – *best practices and repeatable approach based on real-world experience*

Education Commitment – *Edunars™, SharePoint Saturday, Collaboration Experience*

Expert Team – *passionate about solving business challenges through the right application of technology*

Why Kiefer  Our Approach  Client Experience  Case Studies