Enterprise Project Management (EPM) from Microsoft

Microsoft Project Professional 2007
Microsoft Project Web Access 2007
Microsoft Project Server 2007

MS Project – the Art of the possible - projects, programmes and portfolios

Presented by David Dunning
Corporate Project Solutions

- **People**
  - Project Office Services
    - Creation, Support & Delivery
  - Recruitment
    - Permanent and interim positions
  - Training
    - Planning
    - Process based
    - Microsoft Project
    - EPM PMO / PSO Administration

- **Process**
  - Change Management
  - Project Management Consulting

- **Technology**
  - Microsoft EPM Solution
    - Project Server
    - Project Portfolio Server
  - SharePoint
  - Highlight Reporting & Project Auditing
  - Development Services

*CPS - supporting delivery and management of innovation and change within organisations for over 11 years.*
The EPM Evolution 1998 - 2007

- Teams
  - Team participation
  - Email integration
  - Project website
  - Project 2000

- Organizations
  - Project Portfolio Management
  - Resource utilisation & tracking
  - Collaboration - risk & issues etc.
  - Microsoft EPM 2002 & 2003

- Personal
  - Individuals
  - Scheduling & Reporting
  - Up to Project 98

Experience the evolution with EPM 2007...
Typical PPSO Issues

• PPSOs are sometimes just ‘set up’ and have to cover a remit where there is no enabling infrastructure, process or authority provided. **Oh dear.**

• PPSOs work better if they have been designed and deployed as part of an EPM approach

• Challenges
  – What is the ‘Pipeline’ process for an organisation?
  – Plan standards – definition, deployment, governance (DDG)?
  – Common processes – DDG?
  – Reporting Responsibilities
    • Data integrity, availability, usability, effort involved?
EPM can meet these challenges

- People
- Processes
- Technology
- Organisation
- Strategy
Why so important?

Finance  HR  CRM  EPM
Why introduce EPM?

Some typical benefits

- Projects can be prioritised
- Projects can happen with authorisation
- Provide a definitive list of projects
- Enable Project benefits to be managed and realised
- Provide visibility of progress

- Provide understanding of resource capacity
- Support control of project budgets
- Manage Project risks, issues and changes
- Consistent approaches
- Control of project documentation
Solution Definition

Central Repository

Methodology
Process
Roles
Governance
Technology

Maturity | Capability

- Process & Standards
- Portfolio Management
- Progress & Timesheet Management
- Project Workspaces - Risks, Issues, Deliverables...
- Multiple Configurable Views
- Resource Forecasting & Management
- Interfaces (API)
- Reporting & Management Information
An Integrated Solution

Scheduling  Task Assignment  Timesheet  Resource Plans  Events/Notifications  Reporting

Data Repository  Budgeting  Security

Microsoft Project Professional
Microsoft Project Web Access
Microsoft Office
Microsoft Visual Studio 2005
Microsoft SQL Server
LoBS ERP etc.
Windows Server 2003
Windows SharePoint Services
What to demo?

- Bust some of the myths about Project only being useful as a standalone tool (many people remember the Project Central offering, and base their views on that!)

- Show how a single dataset can be used at many levels from managing project detail to helping corporate investment decision-making

- What benefits does EPM give me over and above using un-integrated discrete tools - why should I go through all the pain, and what are the rewards

- Open people's minds as to how such a tool can improve the effectiveness of a PSO / PMO organisation and why PSO / PMO organisations are in a good position to drive forward their organisation's thinking in EPM

- A couple of demo's that make people go "Wow - that is powerful!" - opening minds about the value of EPM
PPSO Interest

- Pipeline Process
- Plan Template Deployment
- Document Standards and Control
- Cross Project Reporting – NO aggregation required
  - Groupings and Categorisation
  - Status / Dashboard / Simple Governance
  - Issues / Risks
- Resource Analysis
- Cross Project Dependency Management
CPS Adds Value With

• Project Auditor
  – 10 individual plan compliance checks on 658 projects in 3 minutes

• Highlight Report
  – Aggregate high level project data, key milestones, issues, risks, products and changes
  – Button click from Project and SharePoint data

• Multi Project Issue / Risk
  – Top 10 corporate risks
Best Practice Implementation Process

Proper implementation is as much a success factor as the quality of processes, standards and delivery technology
It's Simple

- Business Drivers
- Possibilities
- Solution Components
- Strategy and Planning
- Design
- Deliver
- Review

Phase 1, 2, 3…
**Requirements Roadmap**

1. **Aspiration Capture**
   - User participation
   - Brainstorm
   - Problems
   - Aspirations
   - Scope
   - Priority
   - NO ‘solutioneering’
   - Output: Agreed Statement of Requirement

2. **Discovery**
   - Full time
   - Project Manager
   - PMO
   - Process Owner
   - Part time
   - Accountable Executive
   - IT
   - Possible, Desirable, context
   - Output: Solution Overview
   - Issue List
   - Data collection tasks

3. **Capability**
   - Maturity

4. **Envisioning**
   - Feasibility
   - Constraints?
   - Output: Agreed Solution Definition
   - Product Definitions
   - Plan
   - Risk Log
   - Issue Log
   - Initial Architecture Design?

5. **Process**
   - Full time
   - Project Manager
   - PMO
   - Process Owner
   - Part time
   - Accountable Executive
   - IT

6. **S.O.R.**
   - Full time
   - Project Manager
   - Part time
   - Accountable Executive
   - IT, PMO
   - Process Owner
   - User participation
   - Output: Agreed Solution Definition
   - Product Definitions
   - Plan
   - Risk Log
   - Issue Log
   - Initial Architecture Design?
Next steps…

• Internal Requirements – can a project be initiated?
• Seminars – www.cps.co.uk
• Discovery Workshop?
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Lessons Learned
Factors For Success

1. Develop a multi-disciplinary team using the Project Support Office
2. Actively engage the organisation’s executives with strong project management
3. Develop a strong business case for the EPM Initiative – focus on benefits
4. Allocate sufficient up-front time
5. Develop clear and complete business goals, requirements, and usage scenarios based on robust processes
6. Involve representatives from all user groups
Factors For Success

7. Conduct a multi-staged rollout
8. Provide continuous communication / change management support
9. Test the installed hardware and software configuration
10. Prepare the users for the deployment
11. Train users at all experience levels – using customised instructions
12. Prepare to monitor the new environment, **proactively** provide technical support
New in EPM 2007

- Project Professional 2007
  - Comprehensive What-If? capabilities through multi-level undo
  - Change highlighting
  - Cost and budget resource types
  - Task drivers help you understand what is driving a task (predecessors, successors, calendars, resources & constraints)
  - Integrated visual reporting with Excel and Visio
  - Deliverables
  - Cell highlighting
  - Separate Save and Publish / Working & Published plans
  - Active Cache
New in EPM 2007

• Project Web Access
  – Fully integrated with Windows SharePoint Services to improve collaboration to all team members
  – Activity & Proposals provides the ability to create simple plans via Internet Explorer
  – Resource Plans
  – Progress collection (%work complete, remaining work)
  – Timesheets
Project Professional / Web Access

• Microsoft Project Professional 2007
  – Controlled access to project schedules
  – Cross project views of resource availability
  – Access to the central resource repository
  – Resource based costing inc. fixed and material type costs

• Collaboration
  – Risk, Issue & Deliverables Management
  – Document & Content Control

• Web views across Project Portfolios
  – Tasks
    • Individual task lists
    • Progress collection (timesheets)
  – Project Center
    • View summarised and rolled up project information
    • Drilldown to view schedule detail
  – Resource Center
    • Drilldown to view resource assignments / utilisation
Testimonials

- "When we met CPS we were struck that they were a company that could really help us organise to deliver."
  - Gaynor Coley, Development Director, Eden Project Limited

- "I am impressed by the professionalism of the CPS staff in helping us to move from a general vision and aspiration to a workable system."
  - Malcolm Lee, Head of Development Programme, The Met Office

- "CPS was instrumental in guiding the Project Support Office to configure the system to suit BAE Plymouth's organisational, project management, planning and timekeeping requirements."
  - Paul Barlow, Project Office Manager, BAE Systems

- “As valuable leaders in the EPM space, CPS has been appointed to the Microsoft Project Advisory Council in Seattle. Through this ‘think tank’ Microsoft is provided with high level, direct customer insights into the development of future versions of the EPM solution.”
  - Mike Angiulo, General Manager Microsoft Project Business Unit
  - Microsoft Corporation