Professional Services "client Opportunity to Delivery" Solution
Can You Do Something "PxO / Corporate" in Your Spare Time?

Table Discussion Led by David Dunning

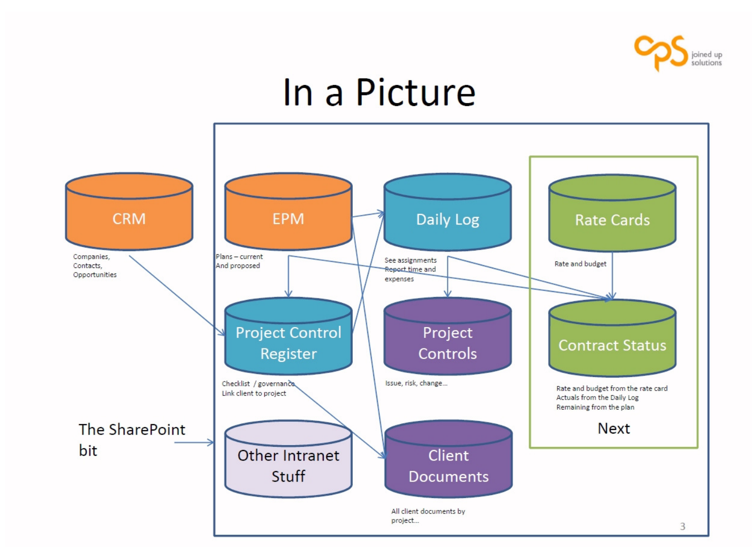
David is the Professional Services Director at Corporate Project Solutions (CPS) and has more than 15 years experience in implementing portfolio, programme and project management processes, technology and training. He has been with CPS since its creation in 1995 and is responsible for developing ideas for new company products and services, directing training, customer support and technology, and widening CPS' service portfolio. David is also responsible for pushing the business to work more effectively and efficiently.

This session; CPS delivers project management solutions and services to clients but we are too busy to deliver something "corporate and proper" to ourselves. What can you do with the right tools if you have a little bit of knowledge and the right access to the right experts? David can show what CPS has put together to manager their business with little cost but with very little time allocation over a number of months. What have we learned, and what would we say to a PMO looking to put together something for itself based around Sharepoint?

I've been asked to talk about SharePoint, we're a SharePoint business, so if I'm not careful I'll start talking about what we do as a business and I don't want that. Then I thought we use this internally, so I just want to expose how we do things. What I've got here isn't a solution to sell you necessarily as best practise, but it's just an illustration of what we've cobbled together as a business using SharePoint as a platform. And it might give you some good ideas, and it might not.

We implement the solutions that are underneath what you're going to see today. But we try to use that technology internally and we've been too busy to put our expensive people who are out consulting.

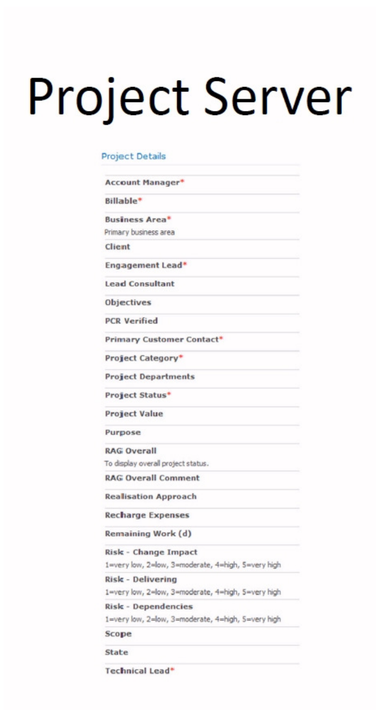
We have a scenario: we manage projects for our customers - customer projects. We have a place where we keep all of our customer company details and the people we work with in the contact details and the opportunities that we work with them on. We have a place where we keep all of our plans & schedules in a central database. We have something called a project control register so when start a new project up, check we have a plan, requirements, that the handover happens, essentially a checklist so that everything is commercially correct. We have got a daily log so our consultants can receive the task list for the projects and can report back what they are doing and we also get our expenses claimed through it. We also need to collect issues, risks, changes, actions, that kind of stuff, so we've got some project controls for that. We need to keep all of our client documents in one place so we can find them, so we can see for which project, which client we have specs for.



Project controls is about commercially checking things start out the right way and close the right way, controls issue risk changes, documents, keeping all stuff together.

So that's starting with standard tools, linking them together and developing them.

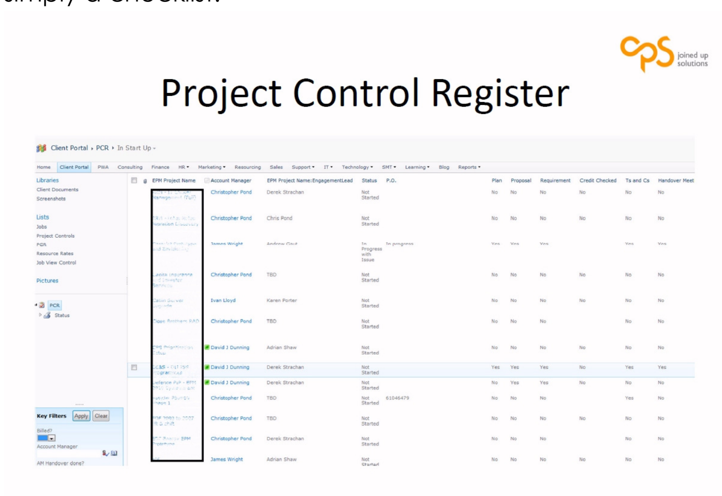
What's the scope of this? We need to maintain companies we work with, maintain the people we deal with in those companies and track any changes. We need to look and see what we've got in the future. For professional services, I need to look 3 months into the future as to what projects we've got, what's coming along, what's possible, how many people are we going to need etc. So we need a way of tracking that duration of the project, and then the handing over and commercial managing of that. I need to plan and allocate resources, I need someone to lead it, need to hand over certain types of work to make sure the project gets delivered and built. I need to score documents it produces, I need to issue logs so I can track what's happening on projects. I need to track time and bill it and to make sure projects get closed the right way. So what we've done is chosen some basic ways. So we've got our contact management, project server, a project database, and SharePoint is the repository for all these docs.



We've taken some standard tools, and we've built it in our spare time. The approach I wouldn't classify as being exemplary. How we got here isn't the best way to do it. There are things I'd like to do differently, there are issues we've face, but I'm happy with it.

The session went on to cover the process from initiation (registration of opportunities) and proposal / bid management through to initial project planning. The tool demonstration showed the audience how the project system, "organises the projects we have and groups them by what stage the project life cycles are at, who the potential person is to lead and run those projects, and then the value and client details.

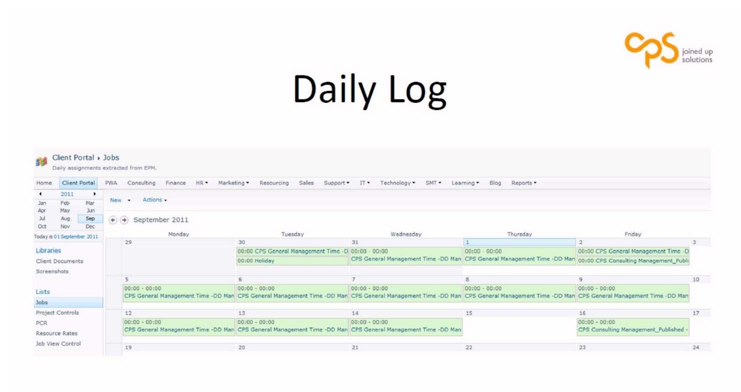
The project control register is the other tool used which is simply a checklist.



As the project progresses documents come together in one place, tasks are assigned and people start to deliver. The project manager categorises the activities on the plan. Information is then given out which can be used for billing. In professional services organisations it is important that billing information, costs and revenues etc are included within the project data. Revenues need to be visible to the accounts department; certain roles will have different levels of billing; some work will be billable, others not.

Day logs are another output from the systems available. The day log is more than just a task list for each individual it can also record just about anything i.e., what has been done by any individual in a given day, how much time was spent on that task, it can record issues, mileage and meals to be expensed. It's more than just a tasking list: it's for time collection and expensing.

The systems are easily accessible by the internet. It looks like a simple tracker list, but it's displayed as a calendar, and people can then – if they want to – simply click on a task, better understand the task, and fill out more information about it. Clicking on one of these tasks, will open up a form, showing when that was assigned, what the task is, information about the task etc



The toolset also includes the ability to see current and future resource management requirements and demands. This view helps with the recruitment activities of the business – planning long and short term resource requirements.

The toolset also includes the issue-risk change log. Everything should be raised as an issue, the then PM decides if it's a risk or issue or change. This will be automatically populated through that daily log. "We're trying to make the process of making a comment/raising an issue very simple, and a PM to assign it as a risk or change very simple as well. All of these combined get presented in view by project or risk or change, and we can manage that info. If somebody creates a new one, I'll get an email about it."

An observation from the audience: "We have SharePoint. If you've got an issue about something in a document, I agree, SharePoint is the name of it, it's about sharing information. If you don't want to, it shouldn't be on there. I agree though, that in itself it shows problems. A lot of PMs who won't share current documentation because they haven't OK'd it with their project board yet. It's all right and proper, but it does mean that you're not up to date with where you're at."

So what was the order of implementation of these tools? The first step was CRM, then EPM (Enterprise Project Management)as a planning tool for the project database. Then the checklist for setting up our commercial projects correctly, where expenses are also recorded.

David finished up the session with some ways forward in bringing in PMO and Project Management tools; “Although you might not want to spend lots now, have a vision of what you want to achieve, and work out what most important things are, put that into the project, and spend that. Once you’ve exploited that capability, and you see that those tactical things work and people are interested, pick off the next pieces. Enable first, get some basic capability in place...then you can go on and do cleverer and cleverer stuff...to make it work, you might have to make some changes to your business. Like break down how you output resources for example. Get better planning, improve your processes, enable a better working environment. Within these areas, let’s remodel it/list the whole capability to achieve. You just focus on the practical next step. You don’t need to explain these steps to everyone, but so long as somebody has that vision...”