Chapter 2

Value Proposition by Role of Project Server 2010

In This Chapter

This chapter is designed to help you to explore the uses of Project Server based on roles, business perspectives, and different stakeholders. We describe them from six different perspectives. These perspectives represent the majority of end users who work and need technology solutions in the project, program, and portfolio management space.

For each of these perspectives, the importance of being able to view, track, report, see, and predict work and progress has an important relationship to the prospective stakeholders and their working roles and requirements.[AU: clarify meaning].

What You Will Learn

* How each role plays a part and how that part is connected in Project Server
* How to understand market opportunities and the right timing of leveraging Project Server for organizational success
* How to understand stakeholders’ roles and involvement in establishing a successful project portfolio management (PPM) implementation
* Key steps in addressing each stakeholder’s needs and avoiding pitfalls while maximizing success factors for a PPM implementation
* Different common challenges faced by different types of organizations that will be implementing PPM and how to overcome these challenges
* Key steps to creating wins for different organizations as well as how to best leverage knowledgeable resources for a successful Project Server 2010 implementation

Clairvoyance with Project/Server 2010: Forecast Future Results

Project 2010 Scalability Flowchart

Throughout this section, we refer to the Project Scalability flowchart (see Figure 2.1). This chart is designed to clarify [AU: OK? I took a guess here, since as the CE points out you can’t really “assist” a role or a perspective]the different people and perspectives[AU: doesn’t it help people, not roles?] in dealing with the challenges and the next steps to leveraging Project 2010 and Project Server 2010’s capabilities, depending on the users’ entrance point for using the application.

Figure 2.1 Project Scalability Flowchart [02-01-scalabilityFlowchart.vsd]

Source: Advisicon

Introduction

One size does *not* fit all. Work systems need to be flexible based on the problem you are trying to solve, the culture of the organization, and the time frame in which the solution is required. Project 2010 is an extremely flexible, configurable environment for managing the work, resources, schedules, and reporting and collaboration needs of the enterprise (see Figure 2.2).

Figure 2.2 Deliverables of PPM Stages [02-02-deliverablesOfPPMStages.eps]

Source: Advisicon

Data from business markets proves that the focus of business in industries today is not about the technology but rather about the processes or the people. It is about ensuring that employees have the best possible impact on the business as well as seeing the alignment of their projects to the business and realizing long-term value from leveraging this technology.

[AU: I have changed the paragraph below to a footnote (it will be placed at the bottom of the page at typesetting); it’s more like supplemental information than part of the discussion per se. I think the mention of the “holistic approach” below makes more sense without the interruption between the first paragraph and the third (which is why I deleted the copyeditor’s query). OK?]

Gartner[AU: explain a bit about firm, or give full name at least?], whose Magic Quadrant report is updated yearly, is an excellent source of reviews on the impact and value of project and portfolio management products. Its analysis of different product suites that support demand, capacity, and resource forecasting and the integration of these data can be a valuable reference point in understanding the best-of-breed tools (including Project Server) that are available to companies today.[AU: any source note needed?]

This holistic approach is known as project portfolio management (PPM). PPM takes into account project management (PM) methodology (standardized terminology, common project lifecycles, project execution stages), the organization’s maturity approach (development of impactful business processes, continuous improvement strategy, management theory), and an enterprise-wide technical platform (Project Server 2010, SharePoint Server 2010) that allows for thorough business use of capturing data, analyzing metrics, and formulating a plan to take appropriate actions.

Although PPM has been most prevalent in select industries, such as construction, aerospace, and some information technology (IT) environments, the demand and benefits have been growing across organizations since the mid-2000s. A few key factors have led to the successful use and adoption of PPM, such as adaptable technology platforms and growing diverse end user profiles (see figure 2.3).

Figure 2.3 Stages of PPM Development [02-03-stagesOfPPMDevelopment.eps]

Source: Advisicon

As the market and technical applications have evolved, new challenges and opportunities have emerged for all major industry stakeholders. Stakeholders can be classified into three main groups:

1. Practitioners (customers/consumers)

2. Independent solution partners

3. Services and training providers

As a result of the evolutional change in the PPM environment, all three stakeholder groups have realized growth and demand from previously untapped business segments and corporate entities. Although this is great for business and the PPM competencies, organizations still have to justify spending to acquire technology and mentorship knowledge to fully leverage these capabilities. Organizations are expecting measurable return on investment (ROI) in regard to the capital costs associated with implementing this type of solution. Project 2010 can bring the benefits of PPM to projects in flight and creates long-term returns with alignment to organizational objectives.

We must therefore address PPM from a business perspective and help key users (via their functional role) understand how to leverage Project Server, both now and as they and their organizations mature with the product.

This section covers examples from six different perspectives and highlights scenarios such as initial product entry points, growth options, and assisting diverse stakeholders with challenges that may not be visible to them. This chapter is not designed as a technical how-to or a step-by-step feature review. It is designed to showcase best practices and focus stakeholders on understanding how to get the most business value from Project Server 2010.

Perspectives

This section contains six viewpoints—perspectives that serve as an analysis—related to how and why Microsoft Project 2010 is being selected, implemented and leveraged to meet corporate business needs. These perspectives are developed from information acquired since the 2010 version release in May 2010 and provide valuable insights, whether you are looking to buy, deploy, or serve as the provider of Project 2010 solutions. The six perspectives are:

1. Microsoft Project 2010 Points of Entry and Scalability: Planned and Organic Growth of Technology and Process Systems

2. Know Your PMO: How Stakeholder Classes are Influencing Project 2010 Decisions

3. Roles Played During Project 2010 Acquisition: Views from a Client, Partner and Microsoft

4. Ease of Implementation and Leveragability of Project 2010

5. Decision Threats: What Can Cause Roadblocks or Resistance to Executing a Decision Regarding the Solution?

6. Challenges and Critical Assumptions Related to Project 2010

Each perspective includes a situation, with a set of common challenges and key steps to capture the win in the face of the challenges at the end of its segment.

Perspective 1. Microsoft Project 2010 Points of Entry and Scalability: Planned and Organic Growth of Technology and Process Systems

This section covers points of entry (POEs), the views/roles approaches that a stakeholder will see or use in Project Server 2010, [AU: Does “points of entry” need to be defined, or is this a known term to readers?]and stakeholder classes. .An example is a Team Member will have a different POE than a Project Manager. This highlights the scalability up or down based on the POE for Project 2010..It is divided into two parts:

1. Addressing the needs of customers (decision makers or stakeholder) by role (essentially POE)

2. Business case study examples with Project 2010 customers and scalability challenges, questions, and resolution choices

Recent trends show that organizations are adopting a culture of joint decisions to improve the collaborative effectiveness of business decision making. This means that decision makers from multiple stakeholder classes have visibility into status and actions across parts or all of the organization, viewing metrics from project, program, and even portfolio management. However, we at Advisicon believe that joint decisions are not necessarily a developed target for a PPM culture; rather they are the environment and DNA inherent in every organization.

Within an organization, the cultural attitude can vary from high functioning to mere survival. The state of organizations does not consistently correspond with the business demands. What this means is that a high-functioning team may be part of legacy systems, while those teams[AU: insert ok?] trying to survive are doing so with a new product or new direction the organization is taking. An example of this is organizations who need to innovate as technology changes (dial-up Support technology approaches online or broadband technology). [AU: clarify]. Thus, we often find that groups performing very efficiently may not be the first to adopt new tools like Project 2010. So, when working with an organization that is adopting Project 2010 in a department or division, the path of growth may not be as clear as we expect.

Identification of, Responding to, [AU: OK? Otherwise I’m not sure what you mean by “identification of reseponding”.]and Driving the Needs of Business Users: Identifying the POE and Path of Growth

Often new solutions are introduced due to frustration, incompetence, or outgrowing the capabilities of current platforms. Indeed, many times new technology is implemented as a result of an actual business case and identification of defined needs. This technological shift can provide a POE at a higher level of the organization as executives look for different options to solve the organization’s growing pains. Or the POE may come from organizational growth and implementation of a program management office or possible project management office (PMO). These managers may need a more holistic tool that grants them visibility at a different tactical level, requiring different analytics and metrics. This POE is also often supported by a business case.

However, Project 2010 usually is upgraded from a previous version or as a replacement for a previous product (non-Microsoft). This scenario can open the door for introduction of Project 2010 at the information worker level. Information workers reside at the departmental level where a group, team, or class of stakeholders requires the capabilities to map and track work against budgets and time. Project 2010 can appeal to many non-IT departments. Historically, the IT department was tasked with sourcing a technology that would meet business users’ needs. Project 2010 exposes business users throughout the organization to the platform’s capabilities, and these stakeholders are identifying additional emerging and immediate needs for this solution.

Adhocracies, Islands of Excellence, and First Available

More and more organizations are considering and approving capital expenses and process changes based on business cases. This practice is not necessarily new per se but has become more frequent in response to the current external economic forces. That means organizations are initiating changes to counteract these newer, external forces.

Many times this results in the sunsetting of some products and the launch of others. These actions usually create a vortex for “pork” to be added—call them corporate earmarks. Since the organization is launching this new product, new technologies, training, or hiring are often tied to the product’s overhead. If a business case is not vetted and validated by multiple stakeholder levels within the organization, quick and ill-informed decisions on lesser solutions may be made to plug the immediate business need or hole.

Without a clear review of the business case, poor decisions may be made based on unseen personal or political partnerships, despite high-functioning or well-performing islands of excellence within organizational departments.

Project 2010 is getting a second look from many stakeholders, even if there isn’t yet an official corporate approval. These POEs cannot be ignored, especially as they lead to an identification of the needs of the PPM culture and of potential growth paths for the organization.

Emerging Stakeholders: The PMO’s Primary and Secondary Stakeholders

Organizations are making significant reinvestments in their internal and external suppliers and in consumer relationships. These investments should also include the reworking of any information systems that are difficult to extract information from, challenging or near impossible to maintain, or just plain archaic.

Organizational remodeling efforts should consider improving the enterprise as a whole rather than focusing on one or two departments. Including the PMO as a stakeholder in these decisions will be a best practice to ensure that the plan of execution for further development will be applied holistically to the PPM environment (Project Server 2010)[AU: clarify meaning]. This holistic viewpoint will help identify growth needs from the Project 2010 solution and enable an organization to turn on targeted features and functionality as it matures. For example, when a construction or IT organization begins to experience work volumes or increased resource demand outside its normal capacity or physical location, it might consider expanding their use of Project Server from just a desktop scheduling tool to utilizing its more advanced features to leverage a consolidated resource pool and common dashboard roll-up reports that are uniform across all projects. [AU: ok?]

The economy is creating buckets of market maturities. These market segments are what companies are working hard and fast to capture or to be first to market, delivering goods and services. We’re reminded of some of the late-night TV shows that are doing mass ad campaigns for products that address consumer needs. As companies move to take ideas to market, they create or spin-up[AU: word ok?] projects, production manufacturing lines, and distribution channels. All of these (whether stable, unstable) create opportunities to leverage good processes, practices, tools, methodologies, and workflows. The more stable, mature markets can support a number of business efforts but may return smaller results albeit with reduced risk. Conversely, volatile markets pose the highest risks but may deliver substantial results. The importance of identifying a stabilizing market means that there is a need to standardize and measure business or product results and to apply PPM best practices and technologies.

Emerging markets are also somewhat volatile, but they possess some level of stability and history to support a business culture that can benefit from applied PPM methodologies and technologies. Looking across the PPM landscape, Project 2010 can approach corporate penetration by modeling a variety of economic scenarios.

Some organizations are stable; they possess all the fundamental elements to acquire, deploy, and sustain Project 2010. Other organizations are volatile; they are realizing the positive or negative impacts of the economic markets. These volatile organizations may be anything from newer organizations hitting increasing growth curves to stable organizations realizing the effects of significant reduction in sales or market pressures. All of these corporate economic environments present opportunities for Project 2010.

This variety of corporate economic environments is the “pull” or driving force that emerging, volatile, and even stable organizations are looking for to be able to apply a set of standards and measurements to help them navigate future growth or change in their market segments or industries. An example is that stable organizations may react more quickly to the visibility of positive results and metrics from applied PPM. This visibility can help emerging organizations address issues or continue to improve as compared to their rivals and peers, essentially allowing them to focus energy on responding to business metrics delivered through Project /Server 2010 versus spending time trying to unearth that information. Time to market and visibility early in a project, program, or product lifecycle enables these organizations to be adaptive and responsive, not left behind. Whether large or small, even some of the industry’s more stable organizations have opted to make business or product selection choices faster than normal. Chrysler is a good example; it innovated its automotive processes and products to react to the down economy of 2009.

Real-World Example: Large Public Utility Organization in the Energy Industry

We would like to showcase an example of a real-world organization. To protect the innocent, in this example, we call this organization Focused Active Kinetic Energy Corporation (FAKE Corp.). FAKE Corp. is looking to acquire PPM technologies but has diverse PPM requirements for each of its different departments. Each department has its own budget and steering team to select the appropriate technology. Although all of the departments have some level of business interaction, they are each tasked with process improvement and managing independent budgets. At the administration level, FAKE Corp. is also looking to secure a portfolio system to manage costs, improve its use of internal and external resources, and meet requirements set by the government.

FAKE Corp. already practices a number of project and program management processes. It uses a third-party product for cost management, and it intends to continue using this product. It has various timekeeping systems for tracking and reporting time worked by resources and is required to use external vendors to take on some of the workload as per a union contractual agreement.

FAKE Corp. is making these assumptions:

* Adopting a scheduling technology will improve resource capacity planning and forecasting.
* All users in the departments will leverage and find value using the new technology.
* Data in the costing system and other systems will integrate with Project 2010 through simple programming queries.
* One of the main components missing from establishing a robust PPM environment is the technology.

Common Challenges

The assumption that data in legacy systems and other planning software are loaded and analyzed as if they were in Project 2010 is wrong. Data outside Project 2010 typically are laid out in a grid format, similar to a Microsoft Excel spreadsheet. But the line items do not have a relationship or any dynamic updating of actuals versus estimates. However, many planning stakeholders use these legacy systems for time-phased purposes (entering forecasts of numbers into the forecast module grid). In doing this, they lack the ability to perform any what-if scenarios of remaining demand and pending capacity. The gap in how the data functions between systems must be considered and addressed prior to implementing the Project 2010 solution; architecting the Project 2010 PPM solution may require some additional efforts in programming that you would not necessarily expect.

Despite your PPM implementation, you can’t assume that your end users will stop using their familiar (but inefficient) non-PPM tools and habits. Implementation of any new tool or solution requires organizational development around the change. In our experience, end users usually resist change and rely on conducting business the old way as long as humanly possible. PPM is a relatively new enterprise business solution. It is likely to take some time before adoption begins to grow at a viral rate.

Often organizations assume that project and program data integrated with third-party costing tools and other planning products will automatically roll up nicely to a portfolio view. This is not always the case. How well these data streams and products integrate depends on the line of business (LOB) application, the data architecture, and the manner in which the implementation of the enterprise resource planning (ERP) solution was performed.

Key Steps to Creating the Win

Creating the win is not just about the technology, the processes, or the people. Organizational transitions need to look at the people, PPM practices and processes, financial management aspects, technology, and relationships as parts of the organization’s gestalt (see Perspective 5 for more on this).

For a successful implementation of Project Server, you will need to determine the key pain points, and be sure to address the enterprise business requirements[AU: OK? “address the needs…of the requirements” seems redundant] through the implementation. This means including views, workflows, training, and reporting based on different stakeholder or organization needs.

Look for opportunities that will have the most impact with the least amount of effort (in other words, the low-hanging fruit). Tackling easier issues and seeing some quick results builds confidence in the solution and provides for greater adoption through viral growth (good news gets around). Conversely, be careful to avoid high-cost, low-return initiatives, as these will literally cost you credibility and may cripple the continued efforts of implementing a PPM system. When that one piece of bad press hits, no one will remember all the good things you have done.

Perspective 2. Know Your PMO: How Stakeholder Classes Are Influencing Decisions Regarding Microsoft Project 2010

This section focuses on role-based decisions (the must-haves) and covers what people in functional roles or decision makers need and use to select the right tool. There are two key sections:

1. Internal and external stakeholders to a PMO or a project governance environment

2. Proofs of concept

An organization’s culture is more volatile than previously believed. Due to the global economic changes of 2008 to 2010, a number of external factors have impacted the ability of organizations of various sizes to select and adopt updated technology. Large, mature organizations accustomed to functioning in stable markets (and planning their penetration into emerging markets) have found that their stable situation has turned turbulent. Organizational business leaders and PMs are now facing additional challenges regarding their ability to make good, informed decisions while meeting the needs of their key stakeholders. In some cases, the business need of the project changes midstream due to market volatility or industry appetite and demand.

The global economic situation that many organizations are facing showcases short-duration impacts, or dips, in process execution. The impact of these durational dips highlights the need to be adaptable and innovative with projects and project deliverables, even midstream, due to the pace at which solutions, technology, and other rapidly releasing or emerging capabilities or needs arise, both from customer demand or emerging solution capabilities. Organizations of all sizes, locations, and markets will dip into uncertainty throughout their business cycles, but normally they do not stay trapped in the vortex of uncertainty. As organizations climb out of uncertainty to a level of stability, the positive trend is typically the result of a stakeholder class or classes leading the changes.

Often IT departments propose alternative options for managing the metadata and supporting end users, but these departments normally are costs centers within an organization. Thus, it is in fact a specific type of end user that leads the change. Picture IT as the basis for supporting what organizations need. It is the business driver, external stakeholder representatives, or roles within an organization that are the key motivating factors, [AU: Possible to rephrase without repeating “driver”?] and represent the face of the change needed.

An example of such a driver within the organization [AU: correct?]is human resources (HR), which is tasked with recruiting and maintaining specific skill groups and talent levels to meet the needs of department and corporate objectives. Maybe it is an operational division or support organization/department [AU: Is your meaning here “maybe it is an operational division,” or “maybe it is constrained”?]that is constrained by its customer or consumer base but needs to find alternative ways to fulfill work orders (work) with a workforce that is increasingly electronically savvy and used to managing and tracking via electronic formats. This stakeholder group will most likely push the tools and solutions to be more in line with its experience or exposure and consumption of digital information or work processes.

Some stakeholder demands are not determinable based on historic analysis of a PPM environment. The demands for work management and cost controls have been pushed down and disseminated across the entire enterprise. Essentially, more and more divisions within organizations are acquiring access to work, costs, budgets, and results. We are seeing more and more integration with technology and work management than ever before. In the past, in the tool versions of PPM systems, end users (project team members) had little input to their tasks or activities, essentially progressing the work or the remaining effort. Now team members can provide extended input, like issues or risks, additional tasks that were missed and send them with their updates to be reviewed and approved by the team leads, project managers or resource managers. Good task tracking over time is a key ingredient for effective forecasting and timephased[AU: word OK?] reporting (past, present, and future) of task and work status. These metrics (start, finish, estimated remaining work, issues, risks, new tasks, etc.) [AU: which ones?] are key ingredients for dynamic scheduling and forecast reporting of demand, capacity, and earned value analysis for projects. To be effective, a PMO must provide an account of progress and accountability for active projects in its existing work portfolio (through reporting and metrics) for stakeholders who have little understanding of the structures and processes of the PMO or even the details of project work tasks. The technical solution platform must capture stakeholder requirements and factor them into decisions regarding the acquisition of tools that can address their varying needs.

Internal and External Stakeholders of a PMO or Project Governance Environment

Project managers and solution process improvement experts have the daunting task of identifying and appealing to many business users. Solution and change initiatives are always more effective when the users respond and adapt to them positively. Now that Project 2010 is a more collaborative business platform, the stakeholder profile and end user classes can help define and tailor their views and reports to their needs with little or no effort. For example, the requirement to meet end user needs may not stop at the direct end user but extend to that end user’s network, not just the team members but external stakeholders who may have an interest in the project, its details or status. Thus, the number of affected stakeholders and potential voices influencing decisions is multiplied. Project 2010 captures that networked relationship.

The Project 2010 experience is more than a business user experience. It is a gateway to project metadata access, and it gives end users the ability to interpret and interact dynamically with the data in order to make more informed decisions before taking action. It is this project intelligence that cascades to the secondary level of business users.

As the business world becomes more connected socially, the environment is moving from an it’s-who-you-know mind-set to a who-knows-who-you-are-and-what-you-do mind-set. Business initiatives and project approvals are based mainly on visible, quantifiable information and analysis. Often that which benefits one stakeholder group will inevitably benefit other groups as well. Ideally, companies will realize much more value from technology and process investments if they can expose those investments to more parts of the organization.

Proofs of Concept

A proof of concept (POC) or pilot project is an opportunity to demonstrate the capabilities of a new approach or solution in a controlled manner in a small organizational area. A POC is an excellent risk mitigation strategy for an agency planning to implement a new system. It can also serve to inform or resolve an analysis of alternatives during the investment planning phase. The pilot helps determine whether the solution is appropriate and how easily it can be configured. It also provides hands-on experience for IT personnel and end users.

For full-scale implementation, a POC should be carefully designed and evaluated. If the scope of the POC is too narrow, the pilot runs the risk of not having a sufficient basis to be useful to end users. If the pilot scope becomes too large or the time scale too long, the decision-making process becomes too drawn out and the business continues to suffer.

POCs are a great way to involve a small cross section of diverse stakeholder class representatives. Organizations can use POCs to their advantage in creating internal champions for the proposed solution; they have touched it and seen its capabilities. But again, careful attention should be paid to the design to ensure using the POC in this way does not backfire and create internal adversaries for the proposed tool.

Activities related to POC projects can be divided into three distinct phases:

1. Preliminary efforts.

a. Define the purpose, goals, objectives, and scope of the POC pilot demonstration project.

b. With input from all stakeholders, technical staff, records management staff, and users, establish the success criteria for the POC pilot.

c. Outline the benefits of conducting a POC pilot as well as the risks of not doing so.

d. Establish an administrative infrastructure to support and guide the POC pilot project activities

2. Conduct the POC pilot.

a. Determine the accuracy of preliminary decisions, assumptions made regarding hardware and software performance, and the service level required by technical staff.

b. Develop and use tools to facilitate documentation, communication, knowledge transfer, and metadata process utilization.

3. Test and evaluation.

a. Assess hardware and software, system and database design, and procedures for training, scheduling, system management, and maintenance.

b. Test product(s) in dissimilar locations for functionality, usability, and benefits derived from using PPM.

c. Validate requirements and performance expectations.

Common Challenges

If the approach or solution worked in the POC, it should scale to the enterprise. Expanding the POC instance requires diligent evaluation of scalability issues. Remember that the POC is purposely smaller in scale and more tightly controlled than a full-scale enterprise implementation.

Patience is often short when clients are anxious to see the solution in action on a full scale. Often clients say, “The pilot only took a month, why is it taking so long to get everyone enterprise-wide (or department-wide) on to the system?”

Security issues can be prevalent, especially in heavily regulated industries. The need to control who gets access to the data in the new system is a valid concern but can lead to security overkill and champions’ disappointment in not seeing the full functionality of the solution. In other words, they ask: “Why did we just spend two years putting this online if we are going to lock up the data?”

An agile approach may work for software development; however, we don’t believe that approach would work for managing our enterprise PPM deployment (that methodology also would be problematic in deploying an ERP or customer relationship management system). Using Team Foundation Server or similar products to roll tasks directly up to a more waterfall schedule would be helpful in blending a PPM system. In general, successful integration requires experienced resources and a good understanding of a schedule that can be detailed enough but yet rolled up for higher-level summary reporting. Since PPM is best deployed enterprise wide for the largest ROI, adequate planning is essential. Sprinting is not recommended; measure twice and cut once for best results.

A common attitude that is seen in organizations is that “We can do this deployment ourselves,” sometimes referred to the DITS, or “did it themselves.” In most cases, this is a very large part of where the project software, commonly called “the bits”, may have been installed[AU: clarify meaning], but no intelligence exists on how to leverage or use them, causing great frustration for organizations. Our experience with PPM partners has shown PPM systems are different from other more mainstream or more commonly used systems, such as Microsoft Exchange or even SharePoint Server. For even a chance at a successful deployment, Project 2010 requires that business users use, at the very least, cases, configuration, and stakeholder adoption plans Similar to the proven project management approach and methodology, the use of historical data, lessons learned, and requirements planning are tenets of an effective PPM environment.

Key Steps to Creating the Win

Utilize a POC approach only if it makes sense for the situation. There is no need to conduct this stage if you already have a well-understood strategy and need to get on with deployment.

Ensure that all of the stakeholders are clearly identified, on board, and engaged in the new solution. You don’t want to discover months (or years) down the road that you forgot to include the finance folks, or the HR team, or the training department. Stakeholders can be your greatest allies in garnering departmental resources when deploying your solution. Again, don’t miss out on the opportunity to create internal champions for the deployment.

Have regular stakeholder communication meetings to keep everyone informed, address objections, and answer any questions. Remember that adults learn through understanding. You need to foster understanding before you can attain buy-in, commitment, or ownership (see figure 2.4).

Figure 2.4 Change Management Ensure that the stakeholders have agreed on a common purpose (e.g., strategic alignment [Morgan, Malek, and Levitt, 2007] including long-range Intention, goal set, metrics, and strategies). [02-04-changeManagement.eps]

Source: Advisicon

Change is hard, especially when it is imposed by an external force. Manage the initiative as you would any large project where you expect to get a positive ROI (e.g., excellent sponsorship, great communications, timely risk and issue management, or colleague quality insurance).

Perspective 3. Roles Played During Microsoft Project 2010 Acquisition: Views from a Microsoft Partner and Consumer

This section outlines various perspectives of the PPM acquisition process, from provider to consumer, where end users will be adopting PPM and leveraging technology solutions and processes. The perspectives are based on the three types of primary stakeholders that play a role in the PPM supply chain:

1. Vendor

2. Partner

3. Consumer

Change occurs only when the environment becomes turbulent. Emerging global markets are realizing the growth trends because of an imbalance. This flux pushes people out of their comfort zones. When the environment shifts away from the status quo, innovation, updating, and eventually change occur.

Consumers of Project 2010 ultimately are looking for solutions that are sustainable and that facilitate the blending of corporate political sophistication with the ability to analyze, select, and deliver initiatives against strategic objectives. In the evaluation of PPM solutions, many times organizations or [AU: where? at this stage? clarify] consumers, in the outset of evaluating technical solutions, are hoping to obtain a complete technology package while ensuring the ability for quick adoption. As the global economic market challenges organizations of various sizes and locations, these organizations must be quicker than they have been in the past to review new, alternative technology options to support their PPM and PMO. This situation is great for products just released, such as Microsoft Project 2010. Customer contact with Project 2010 and interest in the new technology is showing a sudden shift upward, but does that indicate that Project 2010 will be selected and deployed?

Customers are looking to acquire Project Server 2010 but in an iterative fashion. In the past, steps for acquiring or upgrading PPM technology began with an initial pilot, then an expanded pilot, followed by an organization-wide roll-out. Often the technology deployment is coordinated with PMO objectives, so an average lifecycle of updating technology and expanding the PMO ranged anywhere from two to five years. The Project 2010 release has increased these steps, adopting an approach normally found in IT and product development environments.

PPM Supply Chain

The PPM supply chain is a concept that applies to each of the key stakeholders and describes their native roles to ensure clarity of expectations. Besides describing each PPM supply chain stakeholder, we discuss the challenges and opportunities that they collectively[AU: who do you mean?] are now beginning to address. For example long lead planning or new project evaluation and the impact downstream on production, manufacturing or logistics/operations.

Vendor: Software Products

1. The vendor identifies critical needs and responds to the market by using technology to solve those critical needs.

2. The vendor, in close collaboration with the PPM community, creates the strategic vision and direction for knowledge workers and develops a product roadmap for product development.

3. Then the products ( are implemented and leveraged.

4. The business marketing organization develops the marketing program for the product suite.

5. The vendor’s regional sales teams provide the presales support, help consumers understand the product set, and engage the appropriate level of partner support for the initiative.

6. The vendor manages the interactive relationship among the product, partner, and consumer through the sales cycle.

7. The vendor provides product technical support and validation through its support services.

8. The vendor remains responsible for customer partner experience satisfaction

Partner: Program, Project, and Portfolio Management Solutions or Consulting Services

1. Vendor-qualified PPM competent partners deliver professional best practices–based program, project, and portfolio management consulting services.

2. Partners have a deep understanding of the holistic approach of project, program, and portfolio management. This understanding includes people, technology, methodologies, and processes that allow implementation of the best solutions available to match consumer needs.

3. The partner works closely with the vendor and the consumer to determine the consumer’s business requirements, architects a solution, deploys the technology, trains the end users, and manages the consumer engagement to provide a successful solution that meets the consumer’s needs and expectations.

Consumer: Utilizes Business Solutions to Support the Needs of Internal and External Customers

1. The consumer provides the understanding of the organization’s long-range business purpose, goal and metric set, strategies, and priorities of the business.

2. The consumer sponsors the PPM initiative at the executive, operational, IT, and business departmental levels.

3. The consumer works closely with the partner to define the specific business requirements, deployment and training schedule, and ongoing maintenance and support of the PPM solution.

4. The consumer assumes responsibility for the ongoing support of the delivered solution. Note: This also might be a contracted component or part of the engagement that includes postimplementation support.

There are critical issues and challenges as well as substantial wins when PPM champions completely understand and leverage the PPM supply chain appropriately. Often there are blurred lines between who does what in the PPM supply chain. One PPM best practice is for business leaders to enforce adherence[AU: clarify meaning. Do you mean “adherence”?] to each PPM supply chain stakeholder position and responsibility. If each PPM supply chain stakeholder delivers up to the established expectations, the PPM initiative is set for huge success.

Common Challenges

Now let’s take a look at some significant challenges that might limit our ability to produce quantum leaps in performance and consider some potential opportunities to turn these challenges into success.

Most work in organizations is organized inefficiently around specialists employed in what Hammer and Champy (1993) call “functional silos.” This architecture can be very limiting to enterprise-wide collaboration efforts and for visibility into all project work and results.

Many enterprises lack integrated information systems. The 1990s model of acquiring best-of-breed solutions and connecting them together to provide an end-to-end view of the organization’s data have largely failed.

Disconnected Excel and PowerPoint files are by and large the most common method of information gathering and reporting in use today. There is no integrated or dynamic reporting mechanism.

All too often, wePMs turn our attention to immediate and ongoing problem solving. This is a distraction that is not only unpleasant but yields little in the way of significant results. The problems never seem to end; they continue to distract the organization from completing or standardizing. This firefighting mode creates internal morale issues and forces organizations to be reactive rather than proactive, the preferred stance.

Organizations in both private and public sectors that recognize the need for a new integrated solution may lack either the internal competence or the resources to make the change

Most reengineering efforts fail to achieve any results primarily because people resist them. Organizations often fail to develop an adequate plan for the full roll-out to the enterprise.

There may have been a number of failed attempts to provide both a technical and a methodological solution. Often there is a disconnect between these two pieces, both integral to effective PPM. That is why it is important to seek a qualified partner, who is experienced at delivering an end-to-end solution and ensuring that the technology platform is configured to support the methodology.

Key Steps to Creating the Win

A proactive approach to creating the win is that there are no threats, only opportunities. We like to focus on working toward the solution. The one exception is if organizational culture is such that a negative perception is allowed to take over and everything encountered is viewed through that negative lens. Critical thought must come before panic.

This may be a good time to set aside that react mode and put the thinking cap on. Think about the root cause behind all the e-mails. Is your enterprise system failing to channel the communication? Does the organization even have an enterprise system, or just a number of independent, disconnected enterprise systems that need to be replaced? Consider just how many spreadsheets and PowerPoint presentations it takes to run a business of your size. Answering these questions assists in identifying the ROI for using a PPM system as well as the process gaps or integration of different scheduling systems that will produce immediate and long term value for an organization to move to Project Server 2010. These put an organization in a better position to be less reactive and more proactive. [AU: what are these questions?]

There is a complete body of knowledge on “appreciative inquiry” (Cooperrider and Whitney, 2005). Simply stated, the motto of this field of study is: “Search for the best in people, their organizations, and the relevant world around them.” Look at the things you do well, and do more of it!

The dip in the economy is forcing organizations to better understand how to do more with less. What was an important issue at the turn of the century has become a critical business imperative in the second decade of the twenty-first century. Our very jobs and careers are now dependent on identifying and deploying a new means of managing our work, our resources, and our time. Project Server 2010 can assist with building in efficiencies and automations to drive results in less time, using fewer resources. Microsoft realized this need and revamped Project 2010, enabling items such as workflow and business process execution within the basic uses of the tool.

Users are getting better at identifying and using technology to expose relevant information to make decisions. As business trends and needs are forecasted, enterprise PPM solutions will be more widely adopted in organizations by the end of this decade.

Project 2010 introduces a new level of PPM capability to the enterprise to address the critical information needs of the IT and business users. Project 2010 supplies a full enterprise-wide technical platform to support all the aspects of PPM while enabling an organization to address current pain points and build momentum for growth (see figure 2.5).

Figure 2.5 Organization’s Evolution toward Optimization [02-05-organizationsEvolutionTowardsOptimization.eps]

Source: Advisicon

Perspective 4. Ease of Implementation and Leveragability of Project 2010

This section outlines the ease of implementation and leveragability of Project 2010 from the integration and adoption viewpoint.

Microsoft has taken major steps to improve the implementation process for both Project and SharePoint Server. Fewer implementation steps mean that the organization and its users can leverage the technology more quickly and access more features and capabilities.

Now that Project 2010 is an embedded application within SharePoint Server 2010, PPM metadata natively resides within a collaboration platform. By adding the collaborative mechanisms of SharePoint Server, Project 2010 supports well-rounded, highly functional PPM capabilities within one integrated tool.

Implementing Project 2010 is[AU: what is?] (and it is not) about the technology. Microsoft’s integrated PPM solution leverages the world’s fastest-growing collaboration technology infrastructure, SharePoint. Microsoft Project 2010 provides an end-to-end capability that eases implementation hurdles typically associated with other competitive solutions. Project 2010’s extensibility with other LOB applications eliminates the need for a lot of third-party applications to fill in gaps, thereby reducing the points of failure that can be present with third-party application POEs.

Project Server 2010 is built on the SharePoint Server 2010 platform and combines powerful business collaboration services with structured execution capabilities to provide flexible work management solutions. (See Figure 2.6.)

Figure 2.6 Unified Project and Portfolio Management Built on SharePoint 2010 [02-06-unifiedProjectAndPortfolioManagement.tif]

Microsoft Project Server 2010 is, at heart, a scheduling engine. It is a great tool for managing projects of all types across an enterprise. It also includes some great portfolio management capabilities and can help you gain ROI from the business need and value assessment stage, all the way through the execution stage.

In addition to the native capabilities of PPM, Project 2010 also provides deep integration with Microsoft Team Foundation Server 2010, an application lifecycle management (ALM) solution for helping manage the software development process. Together they make a great solution for managing your IT investments.

type="definition"

Application Lifecycle Management

Wikipedia defines Application lifecycle management (ALM) as “a continuous process of managing the life of an application through governance, development, and maintenance. ALM is the marriage of business management to software engineering made possible by tools that facilitate and integrate requirements management, architecture, coding, testing, tracking, and release management.”

Success in implementing and leveraging PPM technology is all about properly assimilating that technology into the organization. Doing so requires tailoring even feature-rich products like Project Server 2010 to the organization and the stakeholders it will be assisting. The two key areas that need to be taken into consideration are the rate of adoption and the methods that will support the PM processes.

Adoption

There is currently a great deal of churn in the solution marketplace, primarily due to the novelty of PPM as an enterprise discipline compared with the disciplines of ERP, human resource information system (HRIS), or customer relationship management (CRM) (whose organizational maturity and adoption tends to be higher). Much of the controversy around maturity models stems from a mismatch between (1) the amount of details and type of processes applied to an organization's basic PM culture and (2) the business market for which those projects are designed to deliver (regardless of market stability).

By helping to build a PM culture and changing the mind-set of the people within that culture, we hope to aid organizations move along the maturity scale to their desired level as quickly as possible. Instead of focusing more time on the tool, mapping an organization’s processes and folding those processes into the tool helps reinforce the workflow and the work behavior (since it is already being done by the resources involved)[AU: clarify meaning if change isn’t ok]. Remember, “Form fits function,” sometimes referred to as F3, is a great example of blending processes to technology and also helps rapid adoption for organizations. PPM is not an out-of-the-box solution. It is most successful when deployed in accordance with detailed planning and folding, reinforcing, or enhancing an organization’s project or program management processes.

Organizations in stable markets might consider choosing a prepackaged method from a reputable partner. This option offers two benefits.

1. It supplies a fully developed procedural offering that can transition to a higher level of maturity scale. (There are many organizational maturity scales,[AU: many what, offerings or scales?] including Gartner’s.)

2. A prepackaged solution can reduce the tendency to go overboard with too many processes. If the organization in a stable industry decides that tools are as important or more important than process, it should consider purchasing tools that come prepackaged with a methodology. This will aid in establishing consistency and developing a deep understanding of how these processes drive and impact organizational structure, the approval chain, and project team development as well as the business of choosing the most appropriate projects, identifying strategic goals, and selecting tools and technology.

Methodology versus Technical Installation

Ease of technical deployment is only one key aspect to consider. Project lifecycles are more easily defined and introduced within organizations when the technology works as intended and is easy to use.

Ease of use leads to viral adoption, which increases the overall potential for establishing an enterprise system for managing an organization’s portfolio of projects.

The greater one’s familiarity is with project phases and stakeholders, the more easily one can keep the project on track and on budget. For reference, see Figure 2.7.

Source: Advisicon

To make sound PM choices, individuals must understand what a project lifecycle is and what factors can influence it. There are many different “lifeycles” in industry and project/program management (including Project Management Institute [PMI], Prince2, Information Technology Infrastructure Library ITIL[AU: spell out], etc.). The lifecycle is a core component to managing projects successfully: identifying project status data across the enterprise for executing well-informed decisions, and building efficiencies in managing multiple projects within an organization.

You the reader, [AU: specify who “you” is here] need to be able to properly define and manage project phases and recognize the differences between project and product lifecycles.

Breaking out project phases and substages (all part of workflow capabilities in Project Server 2010) enables a project organization using Project Server 2010 to outline and manage the flow of information or data that needs to be filled in, updated based on where a project fits within the project lifecycle.

It is also important to understand how to identify, and factor in, how project stakeholders can affect projects.

According to Wikipedia, [AU: ok?]when users are presented with a new technology, a number of factors influence their decision about how and when they will use it:

* **Perceived usefulness.** The degree to which a person believes that using a particular system will enhance his or her job performance
* **Perceived ease of use.** The degree to which a person believes that using a particular system will be effortless.

Common Challenges

An organization adopts the belief that it can deploy a solution[AU: a solution OK?] itself, either because it feels that it can do it or because it cannot get the financial commitment for partner services. Either way, this approach greatly increases risk to the initiative and to the organization. Because PPM encompasses technology with processes and affects organizational culture, expertise in architecting and configuring the appropriate solution to match the organization’s current status while allowing for growth is crucial.

It’s not simply about the technology. The organizational change component that accompanies deployment of any PPM solution cannot be overlooked. Even the smallest change is difficult and often resisted.

Users who think “I already have Project on the desktop, how hard can it be to just save my files to the server?” can undermine building a firm foundation to support organization and departmental growth. PPM is bigger than just the project level.

Thoughts of “I wish we had thought of that when we originally deployed the system” (e.g., reference stages of the project, template types, what department or specifically a common set of columns or roll-up values for summary tasks or [AU: verify meaning] reporting fields) commonly plague organizations that have rushed to get the product installed and are coming from a localized field approach rather than an enterprise approach to deployment. Project Server partners understand how to solve the current pain points, but also know what to account for in future growth within the organization and the technology.

Another common misconception is assuming that all PPM solutions are similar, and using cost as the only deciding factor to rate or rank projects for selection. This is a dangerous assumption, and unfortunately one that is made all too often. For example, companies have a budget to spend, so they approve new projects each year without rating or ranking the importance of those projects to key business drivers or the impact to the resources already working on a portfolio of projects. Microsoft has made significant progress toward portfolio analysis[AU: toward what?] with the introduction of the new Project 2010 solution. This solution is the only PPM solution on the market today that is fully integrated with Office and other LOB applications, such as Dynamics and Team Foundation Server[AU: cap only if program names]. Although cost may be higher initially when creating a well-rounded solution, the ROI and adoption is much quicker when the solution is built to integrate with the systems that people are already familiar with and when the solution accounts for all needs, reducing the dependency on multiple third-party add-ons.

Key Steps to Creating the Win

Utilize a Microsoft-certified PPM partner for planning, deployment, and training of the PPM solution. Such partners have proven expertise to lead an organization through all aspects of implementing a PPM solution. In the long run, the cost will be lower, end users will be more satisfied with their new system, and the organization will find comfort in astute guidance into unfamiliar territory. In-house deployments are risky; they almost always take longer than planned, and because they do not take full advantage of the tool, they diminish ROI.

It is imperative to ensure that technical support personnel, the PMO team, and end users all receive the necessary training. This training includes the appropriate soft and hard skills for managing critical aspects of projects, programs, and portfolios (e.g., communication training, as well as how to use the tool). The PMI has a number of professional certifications for project and program managers, risk management specialists, and scheduling management specialists. Microsoft also has multiple certification tracks aimed at the individual and organizational level, ensuring that partners have the required skill set to engage in this type of solution delivery.

Identify the key organizational touch points necessary to maintain the enterprise processes required to support a PPM initiative. People do not like to feel left out of the loop or surprised. Appropriate and efficient communication is a must. This means getting the right information to the right people at the right time in the right format.

Make sure that key individuals understand what a project lifecycle is and what factors can influence it. Creating these internal champions will assist in growing adoption across the enterprise. Turn these people that they already know and trust into experts.

Consider the bigger picture from collaboration tools to LOB systems. Enterprise PPM encompasses a broad set of capabilities that affects a number of other areas in the enterprise. When applied correctly, PPM truly reaches across the enterprise, granting visibility into initiatives and ensuring that business objectives are supported.

Perspective 5. Decision Threats and Cultural Change: What Can Cause Roadblocks or Resistance to Deciding on the Solution?

This perspective covers threats to effective decision making, including potential roadblocks or resistance to deciding on the solution. We cover three key aspects:

1. Potential blind spots

2. Social and personal networks

3. Facts and opinions (blogs, research, professional associations)

If organizations attempt to push changes too fast or too far, they often encounter cultural roadblocks and wholesale rejection by all concerned parties. The PPM Maturity Model helps senior management avoid such problems by providing a framework to [AU: to avoid repeating “help” twice in sentence.]facilitate communication with executive management by comparing their organization’s PPM processes. Examples of this can be found on PMI’s and Gartner’s Web sites. PMI’s Web site is http://www.pmi.org and Gartner’s is http://www.gartner.com.

An organization’s PPM initiative may stall at Level 1 PPM maturity. Level 2 can be difficult to reach once business units and changes within the organization begin to move from a just-get-it-done environment to a more organized process-driven one. Ultimately, companies looking for ROI from PPM expect that the ad hoc style of PM at Level 1 will give way to a more formal PM discipline. PM initiatives and PPM technology deployments have faced these classic organizational challenges for decades. Typically, some stakeholders are not supportive while others simply do not understand or validate the benefits. The launch of Project 2010 within SharePoint Server 2010 coincides with the evolution of the socialization of business problems and the virtualization of information. Those stakeholders who would not normally be supportive now have wider and deeper access to information that enables them to ask more informed questions and make better decisions. As these normally supportive stakeholders uncover more information, they may have a change of mind. Conversely, the availability of information and the validation of specific types of information by peers may cause the typically resistant stakeholder to become supportive and convinced of the value of PPM. The key is to read the signs as these stakeholder profiles change, as the decision making world we live in has changed.

Microsoft’s research and our partners’ experiences are listed next.

* **Emerging disciplines.** Organizations are migrating more quickly to a PPM environment in order to realize the ROI of managed work data, including work governance and alignment of projects with business drivers. A growing trend of project and ROI validation is beginning to take root. PPM supports a variety of project and program tracking disciplines, such as Stage Gate (for product development), ALM, and PPM (for professional services). Project 2010 now covers additional competencies and disciplines for a stronger and more richly integrated PPM environment for business and project stakeholders.
* **Initial and annuity costs.** Many of the competing products to Microsoft Project 2010 offer competitive licensing options, such as free access to the data, in an attempt to secure PMO data within that product’s environment. However, the long-term costs of these competing products in regard to both acquiring the technology and supporting deployment and adoption by business users is not known up front.

Microsoft makes a strong case for total cost of ownership (TCO) when taking into account the innate extensibility of the technology (its augmentation and integration with other products) as well as the much larger market of qualified partners and vendors to support deployment. The Microsoft partner program is a proven model for effectively screening people and approaches to determine their ability to support a wide variety of business requirements worldwide. Arguably, competing products carry a higher price tag of consulting and training as well as maintenance fees and support costs when compared to Microsoft. That being said, Microsoft’s Project 2010 technology does not support itself. As with all PPM technologies, there is still a requirement for ongoing technology and business user support and maintenance. The question becomes: Which solution provides the most scalability to bring the quickest ROI now and with future growth?

* **Transition from guesstimates to project intelligence.** Organizations worldwide tend to make high-level assumptions or to analyze and make determinations of project status or health as well as look-ahead(s) based on resource planning systems or ad hoc processes. Many organizations compare the efforts of their resources (amount of work specific to a task) and assign a monetary value to the results. As a result, fiscal planning and corporate financial auditing involves both art and science to summarize the organization’s financial status.

There exist several highly complex, comprehensive tools and methodologies to estimate the financial health of organizations; nevertheless, analysis still is involved. Without incorporating the scheduling or timephased information from a project tracking or PPM system, these financial forecasting modules still just provide best guesses.

Essentially, if an organization is planning a fixed number of strategic objectives and looking at forecasting requirements such as costs and resources, a time-phased estimate is also required.

The ability to optimize and automate the PPM system, especially around financial or work metrics and processes, [AU: should this be part of list? Specify what “it” refers to] really comes down to if-then situations. Decision makers need to identify key events or work packages, assign constraints to those events and packages, then create relationships between them. This ability to integrate strategic plans from a portfolio or ERP system to a PPM system is becoming more essential; it is the inflection point for organizations to transition from coming up with strong guesses and estimates to a more quantitative project-based intelligence that can be updated, tracked, and adjusted throughout project and program lifecycles.

Over time (fiscal year over year), organizations will be able to compare actual historical results or incorporate these data into forecasts.

The analysis, selection, and adoption of PPM technology requires multiple levels of commitment. This is not to suggest that commitment is an all-or nothing situation. Think about any enterprise system or a centralization of doing work a specific way. Classic scenarios show there are those who will embrace change and those who will resist it. Although those archetypes still exist, it is not critical for an organization to alter the hearts and minds of the naysayers or protect the supporters. It is important to understand that a successful implementation of Project 2010 will require training, change management and involving stakeholders, showcasing the strategic benefit to each stakeholder group. [AU: edited to simplify; however, it’s not clear how this fits into the discussion. It seems more like an editorial aside in this context. Elaborate, or delete entirely?]Project 2010 and its collaborative capabilities allow for virtually every role-based profile to adopt, understand, and utilize the technology as it was meant to function.

Thus, the threats are less a matter of creating a one-time full adoption of a PPM implementation but more of designing a phased solution that enables organizations to embrace a multilevel environment and scalability that will enable utilization and knowledge transfer while both reinforcing and maintaining PPM governance and structure. Essentially, this approach creates an environment of project intelligence. Regardless of how raw the project metadata are and what the technology or path of adoptability allows, the right type of system will help mature the project metadata to an analytical level.

Potential Blind Spots

The effectiveness and use of technology in a business climate is a two-way street: End users have to learn how to the use the tool, and the tool must be configured in a way that users can use it. Microsoft Project 2010 with the SharePoint integration and added social and collaborative elements presents unique solutions where users are looking to shape the technology to more closely meet their needs, essentially leading to an enabling of existing processes or tool approaches, but now centralized in SharePoint.[AU: correct word?]. In years past, Microsoft has marketed the notion that its business products enable users to be more productive. However, in other discussions, the term “enabling” takes on negative connotation, indicating that external sources can foster bad habits and encourage poor results by employing kludges to work the technology rather than letting the technology work as it was intended.

Stakeholder profiles are morphing. For years, organizations and external stakeholders, such as consultants, have relied on organizational charts, role definitions, and other tactical data for use in objective planning, forecasting, recovery, and other corporate requirements. Matrix hierarchies have added an additional complexity but still are manageable through the use of visual charts and other tools.

These days, more is accomplished through management by objectives (MBO) approaches. Objectives still may be aligned in relation to a specific role or department, but as organizations are looking to increase efficiencies and output through a reduced workforce, the elements of skill set, positional visibility, and other factors are leveraged in a MBO approach. Thus, the work and changes that are being instigated may or may not come from those sources expected.

More and more organizations are changing personnel, strategic objectives are under more scrutiny, and the results are sometimes unexpected. All of this creates some degree of havoc and forces both internal and external business users to pursue and address these[AU: what threads?] objectives beyond the tools, reports, views [AU: not clear--how do you “chase beyond [the] tools and visuals”?]and visuals already available. This pursuit ultimately allows organizations to reflexively return and improve their existing views, reports and tool solutions in a cyclical improvement process.

type="example"

A PPM System that Missed the Initial Mark

An automotive support organization we once assisted was looking to select a project lifecycle tool using Microsoft Project Desktop 2010 and SharePoint. After a lengthy and deliberate planning process, the roll-out was compromised due to an undocumented customer (external force) that wound up playing more of a critical part in the system roll-out and structure. This unforeseen stakeholder represented a set of compliance and regulation requirements not initially defined or understood.

A new set of rules and requirements was created not only for the system but for the executive team. The Project Server PPM system had to be retooled quickly across the existing projects, views, and reports, and throughout the PPM structure. A lot of reevaluation and rerunning of the business intelligence reports was necessary to revalidate the original decisions and decision points. The key here is that up-front stakeholder identification and integration into the PPM lifecycle process enables a higher degree of satisfaction and communications through reporting.

While Project Server 2010 and its new features give the end user the ability to update and change the interface they are working with, the larger implementation has greater and more far-reaching impacts. In some organizations, this can be the kiss of death of whether a system is adopted.

We did not experience a failure of planning for scope definition with the automotive organization; we gained an opportunity to increase the realization of the potential capabilities of Project 2010 and SharePoint 2010. We had the option to replace more systems and shift additional business functions to Project 2010 and SharePoint 2010,which is what led to this dramatic change. The profile morphed due to the actual deployment of the system based on a wider set of stakeholder needs.

The Microsoft technology stack for PPM—Project Standard 2010, Project Professional 2010, Project 2010, and SharePoint Server 2010—has been available and supporting PPM campaigns for the majority of the twenty-first century. As the industry is realizing an uptick in specializations, such as Project Management Professional (PMP) and Microsoft Certified Professional (MCP), that have certified competencies in project environments, we have observed some new bad habits developing. Previous versions of Project Server have shown tremendous capabilities in key PPM initiatives, such as scheduling and resource forecasting; however, some technological weaknesses and a wide organizational immaturity of PPM have led to both the growth and the adoption of poor technology and processes as well as ill-founded, preconceived notions.

Project 2010 has addressed many critical requirements for effective PPM. Information relating to the robust features available in Project 2010 is lacking, which is leading to a gap in project organization’s understanding of how massively the new product has been upgraded[AU: OK?]. We anticipate many Microsoft PPM supporters may build in too much buffer to compensate for past versions or previously troubled PPM roll-outs. This may lead to overestimation, overcompensation of time and effort, or misjudging the technology and process requirements.

In an established (or a maturing) PPM environment, two critical factors must be accounted for:

1. The acclamation and use of the technology by a wide variety of business users

2. The technology’s functionality and ability to meet the needs of the business users

As discussed, adoption is part hands-on experience and part perception management. Change often is not viewed in a positive light, so demonstrating how the tool will make job functions easier and demonstrating the shallow learning curve is essential in ensuring organizational adoption.

Social and Personal Networks

The Internet and Internet services offer a good portion of information channels for business users today, but information channels leverage multiple means, including word of mouth, third-party channels (representatives), research, ratings, search popularity, and the like. Microsoft Project has always ranked high in studies and research, but how does it fare in other information channels? One way to evaluate the situation is to look back a few versions, to one of the enterprise platforms in early 2000. Preliminary official studies were performed to evaluate Project users and their experiences. Decision makers and business users relied on a few formal and a number of informal information channels, mostly unproven and highly subjective, to get the data that would influence decisions.

The results of studies, comparative analysis from PPM implementing organizations, [AU: from the preliminary studies? Meaning not clear] and the technologies, solutions, and training delivered with the technologies are being rated. PPM is more and more a vital part of the business culture, albeit still leveraged at a low maturity state. Processes are now leveraging PPM technologies (specifically Project) to meet not only corporate strategies but compliance issues, budget requirements, and regulations. PM practices, such as earned value (EV) in the construction and government industries, have long been used for litigation and tracking. Now a much wider set of organizations are leveraging these practices in scaled-down versions to gain more control over work and costs.

Moreover, as professional specialties increase, certifications for projects as well as industry certifications, such as project management, risk management, program management, training, and scheduling, are adding additional information channels, and communities of practitioners for business users to reference.

Sales professionals have an advantage when it comes to collecting feedback from their calls on prospective executives and decision makers. Sales experts in any industry have insight into the pulse of the market and what their prospects’ competition may or not be doing. Many business professionals who serve as decision makers or influencers attend industry conferences and other sessions where they can network with colleagues. Another form of feedback is pure feedback, which is typically a direct, hands-on experience. But is it feasible to increase your contact with pure feedback while extending your ability to leverage peer feedback?

With information streaming in from multiple sources, often at lightning speed, it is important to maintain critical thinking when looking at feedback. A blend of sources should be evaluated, analyzed, and investigated before decisions are made.

Facts and Opinions (Blogs, Research, Professional Associations)

In the age of Internet services, communication options are growing: texting, social media updates, blogs and video. We continually hear from customers and organizations that there is information overload. The issue is less one of information overload but more of inaccurate or unqualified information overload. Everyone has an opinion, not all opinions are fact, and people now have many more and farther-reaching channels with which to voice those opinions. When there are many sources of information about PPM tools and scheduling best practices, you need to find common watering holes and expert sources. When researching Project 2010, a good place is Microsoft’s project sites or most valuable player groups (industry experts recognized by Microsoft who have a community-focused outreach).

Because the virtual world is always on, business users globally now have access to live people and current data 24/7. Many times this accessibility leads to discussions, responses, and additional opportunities to reconsider a course of action to address business problems. This pull in the market is leading to business users, such as consumers of PPM, being more knowledgeable about the depth and breadth of PPM technologies and processes. Additionally, social media channels, such as blogs, wikis, and videos, have content providers creating a push inertia that gets their thoughts and opinions out to a wide consumer base.

Common Challenges

Challenges may arise when an organization assumes that each business unit has similar demands, objectives, and pains, and that it can use the same solution as a different organization or unit within the organization. In a situation similar to the halo effect, a portion or group within a company recognizes the value another part of the company is realizing from a solution, and they see that same solution relevant for their situation when it may not be. [AU: OK? Otherwise the first sentence and the second sentence seem to contradict each other.]

Another common challenge is when an organization tries to create a solution that fits everyone. This has been referred to as solution crowdsourcing, or community-based design. In this case, each division or group defines the common solution to its specific needs; again, the organization is trying to create a one-size-fits-all design.

Mandated change is often the hardest for people to digest. It is important to understand that change initiated from the top does not automatically guarantee an easier adoption.

The assumption that the new system will make employees’ jobs harder is prevalent with the introduction of new tools, technology, and processes. Employees do not want to feel that they will be forced to drink from a fire hose. People are very sensitive to learning curves, as they understand that work already on their plate still must move forward while they learn the new system.

Issues of control can create problems in the adoption of PPM. Employees worry, “I control my environment today; the new system is a threat to me and may make my job unnecessary.”

Often new capital investments are viewed as wasteful; however, maintaining a status quo that is currently seeing little benefit rarely turns around into visible ROI. Sticking with the status quo can undermine future growth and increase or continue to promote the current inefficiencies, which could then outweigh the costs of a new system.

Key Steps to Creating the Win

Analyze the bigger picture to get a better understanding of the current versus proposed TCO. Considering just the tangible costs of licenses and maintenance for the existing system is no longer sufficient to justify the new integrated approach. It is important to look at the increased visibility and decrease with human inefficiencies resulting from the nonintegrated and even broken systems should be factored into the decision making.

New generations of information workers are adopting the new social software solutions at an accelerated or rapid pace. Organizational rework must take into account this new way of doing business both internal and external to the organization through partner supply chains, social networking, and knowledge dissemination. A modern organization must ensure that the new PPM initiative and team is looking at the long-range goals of the enterprise.

Engage all key stakeholders in the organization on the initiative. The HR department can play a significant role in the area of resource management, skills inventory, and role definition. PPM is a multiplayer game, and the stakes are high.

Establish a positive change culture within the organization by ensuring that new PPM initiatives are successful and deliver on the promise of streamlined work, collaborative teams, and assistance in working smarter, not harder. Identify key initiatives where a win-win outcome is highly probable and ensure their success; then go and communicate that success. Viral adoption will take it from there.

Don’t judge PPM merely by its past. A number of technologies had hiccups and burps when they first came out. Today most organizations already have one ERP system and one HR system; someday we will see the average enterprise develop a common platform for work and resource management.

PM is a relatively new discipline. Prevailing theory, such as the critical path method (CPM), has been around for only 50 years. Microsoft Project has been in the market for approximately 20 years, and there are already over 20 million users worldwide.

Perspective 6. Challenges and Critical Assumptions Related to Selecting Project 2010 as a Solution

This perspective addresses the various challenges and critical assumptions related to selecting Microsoft Project 2010 and sourcing expertise. Four major topics are covered:

1. Internal deployment versus vendor or partner involvement

2. What do the external information streams offer?

3. Advantages to sourcing a qualified partner

4. Critical assumptions: knowns and unknowns

Technological and social media capabilities have proven to be an effective channel for businesses to market, communicate, and interact, especially to manage projects as the global economy morphs from stovepipe industries into a virtualized economy.

Project 2010 offers the most comprehensive and collaborative PPM solution on the market. The new release has taken great strides in incorporating business processes, workflow, BI, and the most prevalent scheduling driver in the marketplace. But as mentioned earlier, the concept of PPM encompasses more than just the technology. The requirements for a successful, ROI-creating PPM implementation are varied and diverse, and involve multiple layers of the organization. Assumptions must be identified and validated. Expected challenges must be addressed to ensure that the organization is placing the best PPM tool for its needs into its environment. In today’s sophisticated business environment, believing that decision makers are going to choose Project 2010 simply because of name recognition is a weak position. Organizations need to understand why the capabilities of Project 2010 make it the best tool to meet their needs now and in the future.

Business leaders are leveraging technological options. Corporate functions such as legal, HR, accounting, and IT are being subsidized through outsourcing or by tasking internal personnel to learn and manage the technologies using information available through the Web and social contacts. The internal competencies and capabilities of each person in the organization continue to rise as these changes are adopted. Similar to the process by which the personal computer changed the way data and information was created, shared, and stored, organizational business users are getting better at identifying and using technology to expose relevant information to make decisions. Unfortunately, these technological evolutions can instill a sense of confidence that organizations can do more with less, if not do it all with less. Indeed, technology is more business user friendly, but the need for solid planning and leveraging competent resources must not be overlooked.

Consumers and business decision makers are savvier than they have ever been. With organizations spending more than 50 cents of every dollar of their IT hardware budget on storage, and with the amount of data being stored and managed growing by double-digit percentages or more, savvy IT managers are exploring a variety of new strategies and technologies to reduce infrastructures costs. The pressure on IT professionals to store, preserve, and protect data while still making data accessible has intensified.

Organizations today continue to look for ways to reduce implementation and administration costs while driving value and profits directly to the bottom line. As information becomes more available and as people are more readily accessible, organizations are taking bold steps to select and implement change using technology and processes. Since PPM is intricately involved with corporate constraints, such as costs and resources, and with bottom-line results, such as actual work completed, there is a vested interest at the decision making level to do everything right.

Many times organizations mistakenly choose to install the technology themselves, internalize their process improvements, and leverage the growing access to information via Web and social channels. Although there is a strong business case for taking this approach in organizations that have employees who are knowledgeable in the technologies to be implemented, the risks are similar to those of laypeople self-diagnosing and self-medicating when they feel ill. Often people who feel sick are right: They have a cold. But other times they are mistaken and need prescriptions or perhaps more preventive measures. In hindsight, such people would have been better off had they sought assistance from experts sooner.

The next scenarios highlight the perspectives of an organization’s option for going it alone and its option to secure assistance externally in support of a Project 2010 initiative.

Many organizations in today’s economy are looking for more cost-effective measures and to utilize internal resources as much as possible. The challenge Microsoft Project 2010 faces today is that it is technically easier to set up and deploy as an infrastructure than ever before, which makes it seem that it can just be “installed”; but the tool is not just a simple scheduling engine, it is a full-spectrum enterprise project/program and portfolio management tool. Therefore, many organizations are choosing to have their internal technical staff do the deployment. A good example would be similar to having IT install an ERP system like Systems Applications and Products ([AU: is this correct, from below?]SAP) without involving accounting.

Prospective Options to Selecting, Deploying, and Supporting Project 2010

Project 2010 is capable of interacting and sending or retrieving information that may come from other systems of record (e.g., HR systems, time-sheeting, or actuals). Thus, often there are security concerns associated with that information and the ownership of system-of-record data. An example may be when integrating financial data, often from an ERP system, or product design system.

Organizations have established policies and effective processes around data compliance, financial, and product development environments. They have also dedicated employees to serve as internal experts to manage the data. Sourcing an external entity that may not have the depth and experience or qualifications to handle sensitive data to focus on Project 2010 poses a risk. In this instance, it may be beneficial for an organization to install, configure, and deploy Project 2010 internally to maintain control of the sensitive data.

Project 2010 leverages the SharePoint Enterprise platform and enables more integration of BI metadata to be threaded within the management structure for Project 2010. SharePoint has evolved as a business data management system faster than Project Server. Many organizations have already initiated document management and information portal campaigns prior to the consideration of a PPM system. Many instances have SharePoint supporting data from other legacy systems, including SAP[AU: see query above] in data processing, and project lifecycle management systems. Often SharePoint is already being used for continuous improvement, lifecycle management processes, and other information sharing and collaborative functions. Thus, organizations have acquired a significant level of knowledge working with the data in an enterprise environment. Adding Project 2010 may seem like a manageable step for internal resources.

The main business justifications for Microsoft Project 2010 are its ability to expose, track, and control resource work and costs related to actions that are tied to corporate objectives and goals. Because Project 2010 resides in an enterprise collaborative environment (namely SharePoint Server 2010), it is increasingly critical to business users that Project data are accessible and reportable. These requirements typically are core for effective delivery to the strategic objectives, which makes Project 2010 much more enticing to internal decision makers. As they know the business better than anyone else, they make assumptions that they know how to structure the technical business platform to meet their business needs.

What Does the External Information Stream Offer?

As the Internet continues to grow and mature, so do the data. The U.S. judicial system is built on the premise that all individuals are assumed to be innocent until proven guilty in a court of law, and accused individuals have the right to receive a judgment regarding their guilt or innocence by a jury of peers. The Internet has followed a similar example, where data are true or valid until they have has been reviewed and rated by others. Decision makers now have access to more channels of scrutinized options that contain credible, validated information complements of social media and the virtual world.

In the past, research firms spent staggering amounts of time and capital to reach end users, rate products and services, and craft analyses of the findings that were meaningful to business decision makers. Today, search engines such as Google and Bing are advancing the search algorithms to mine data based on results criteria.

A huge array of Internet sources provide a broad range of resources to an organization that wishes to deploy a PPM solution without a partner. A number of these Internet sources either provide access to their resources via a subscription or act as storefronts for their partner offerings. The informational content provided often is only a part of the necessary knowledge required. Just as business decision makers have become savvier, marketplace providers have become more astute at crafting content to drive sales. Microsoft has created a focused portal for Project on its Web site.[AU: provide site?] You can do a quick search on the Web site to find the central repository of information for Project Server 2010.

At the time this book was authored, key social and business networks that are directly involved with PPM include LinkedIn, the PMI Scheduling Community of Practice (formerly the College of Scheduling), and the Microsoft Project 2010 PPM Virtual Showcase. A new category of social collaboration software is breaking through the grid from multiple third parties. Virtual events sites, including the Microsoft Worldwide Events (WWE), offer a significant amount of self-paced, on-demand training.

A number of professional associations are primarily in the business of brokering knowledge, certifications, and people networking. These associations offer a multitude of complementary training, white papers, videos, and access to trial software and complementary learning products.

Advantages to Sourcing a Qualified Partner

There is inherent risk in not ensuring that meeting the end users’ needs remains critical for the success of implementation and adoption. Organizations have become more aware of end user needs and the critical relationship between user preparation and implementation success. However, old habits still remain: Organizations assume that once the solution has been installed and the training has been delivered, they will reach a level of competence that will remain constant.

An organization’s ROI will improve only with a prolonged effort to ensure the ongoing competence and confidence of its users in the usage of the tool. According to a report from International Data Corporation: “Training on complex systems is a never-ending cycle. There are always new processes, new employees, and new locations that must be brought up to speed or brought online, and no group can be left out” (Anderson, 2006).

Many times a business system initiative is launched within an organization to meet its internal needs. For example, a product engineering team acquires PPM technologies to manage its project and programs. Demand inside the organization from another department (e.g., the sales department) forces the change with engineering. A very common example is when the sales department is selling work that has to be managed or built out by engineering, and what is promised to the customer by sales is proving difficult or impossible to build in engineering. This is a classic example where engineering departments have moved to standardize templates and folded sales organizations into that workflow so that cost estimates and proposals are based on some measure of scheduling and work reality. Mastering these insights requires experience with the inherent needs and capabilities of PPM; a qualified partner can help an organization identify and fold these needs and capabilities into a PPM implementation. This will save the organization time and heartache.

SharePoint is a game changer. “SharePoint, in a sense, is becoming an operating system,” stated Steve Ballmer, chief executive officer for Microsoft, at the SharePoint conference in 2009.[AU: any source needed?] There is a new dynamic to the Enterprise Content Management space. It’s being enabled and forever changed with the new release of SharePoint 2010. Many organizations already own SharePoint, and many partners have subject matter expertise across countless verticals and horizontals. Likely there will be an explosion of partners and solutions hitting the market in the coming years.[AU: OK?]

Qualified partners can help improve IT service excellence, lower development costs, and help organizations develop their competitive advantages through the innovative application of the Microsoft SharePoint platform.

PPM historically has had to compete for funding as an IT expense. As the PPM software has grown in size, scalability, and use, the infrastructure requirements have increased. Additionally, the collaboration elements with PPM technologies demand more from the organization’s systems, processes, and end users. What normally starts in IT expands to other groups, leads to the need for additional training, possibly extensive consulting services, and ongoing system and process support. It truly is a culture change.

Project 2010 is a business application within a business platform. The approach for organizations and consultants to secure executive agreement requires a team effort and a shift in the approach used with earlier versions of Project Server implementations.

Critical Assumptions: Known and Unknown

In previous versions of the Microsoft Project product, the technical architecture depended on leveraging and extracting metadata from environments. Typically, the SQL Server is a secured environment, with restrictions at the highest level due to the sensitivity of the information that has potential to be exposed. What typically happens is that Project Server data is made visible, bringing a dose of reality to the users and decision makers, who can (in some cases) have visibility for the first time and see that information in context—a PM context, which often requires a skilled “interpreter” of the message and impact of the data. We call this “telling the story.” It is important to not just have metrics roll-up for reporting but to allow the addition of user-defined fields or comments. These metrics can be utilized, analyzed, and trended over time to see the business benefits and successes or failures of different activities, approaches, resources, or even individuals.

Another critical assumption is that organizations are constrained by the budget they are allocated. Individuals tasked with setting, managing and controlling the budget are the critical stakeholders. Many engagements, partners, and even internal stakeholders find themselves at the mercy of the financial controller, who must sign off on expenses.

There are times when an organization is more agile and the financial subject matter expert has assumed that the manager or requester of the project has the business case already approved. However, sometimes further explanation is required, and that justification tends to scale beyond a straightforward IT investment or training cost. PPM is not just a quality or continuous process initiative, although it affects and supports both by its very nature. A strong business case that is articulated in bottom-line facts and elements is required for the costs to be supported and approved. The stronger the business case, the easier it is to align the ROI for what the Project Server needs to report on.

As mentioned in the Project Server Demand Management white paper written and posted on Microsoft Web site (<http://technet.microsoft.com/en-us/library/ff686781(office.14).aspx>), understanding and quantification for the use of Project declines the farther away it is from the PMO construct. Many times pockets of activities and unique initiatives within organizations go unnoticed and remain undetected within the PMO.

Why is this an issue? Typically, these initiatives and activities require the contribution of resources—many times skilled resources. As organizations are utilizing shared resources on a majority of their initiatives, this lack of visibility can affect the bottom line when resource constraints affect project success.

Decision makers are of different profiles. According to a report, “Decision-making styles are behavior-based, so the key to correctly identifying an executive’s tendency is to pay attention to what she does, not what she says” (Santosus, 2003[AU: page for quote?]). Understanding how to present a well-articulated message is a *core* competency; delivering that message in a manner that resonates with its target audience is, however, the *critical* element that often is not taken into consideration.

type="example"

Progressive Global Manufacturing Organization and the Challenges Often Faced in Choosing a PPM Solution

One organization we worked with was a global entity in the manufacturing industry that had been in existence for decades and was a leader in the space it served. Product lines were diligently managed by teams of experts in their respective fields, including certified project managers, certified engineers, and other industry experts.

The product teams used a third-party product for overall project visibility, but all the scheduling and forecasting was performed using Project 2003 Desktop or Microsoft Excel. Essentially, program management and key milestones were managed in the third-party application, and data were cascaded to the subgroups that report using Project or Excel.

One of the subgroups was looking to upgrade to Project Server 2010. Its goal was to secure better resource capacity planning and forecasting and a better ability to meet key program milestones.

This organization was making the next assumptions:

* Project 2010 would simply be a scheduling and resource planning tool it could use as a subset to the third-party application already in use.
* Since the staff of the subgroup was already using Project 2003 Standard, the organization believed that migrating all users to Project 2010 would be easy.
* The processes for managing resource load and related costs (which were currently done in Excel) would be easily adapted to Project 2010 by simply transferring data from legacy products to Project Server 2010.
* The third-party application already in use as the main PM software would drive the demand from the program level, and each subgroup would simply report its schedule status from Project 2010. The third-party program would still have better visibility.

Our analysis:

* Project 2010 is used to pull all groups together into a central Project platform to better align with the program level than the organization’s current implementation of Project 2003. Project 2010 is an integrated system built for accessing data visibility at multiple PM levels
* Project 2010 might initially work as a complement to the third-party application in use, but if the deployment was executed well, stakeholders should see more innate capabilities in Project 2010, and it will eventually replace the third-party application
* Project 2010 data extends across all Microsoft Office applications. It offers collaboration and other Web capabilities that the third-party application does not. This allows for easier end user adoption of usage from familiar interfaces. This deep integration removes the need for third-party add-ons, reducing potential points of failure and the requirement for customized, costly programming.
* Project 2010 will serve as a business and BI platform, including earned value and strategic planning for all programs
* Selecting a qualified consulting vendor that specializes in Microsoft Project and PPM will ensure a smooth integration of all systems in use

Sometimes there are opportunities for POEs by capturing a departmental need and scaling the larger solution to address that one need. Over time, more capabilities can be introduced to the organization to illustrate that Project 2010 accomplishes in itself what multiple systems are currently used for. Organizations are looking for cost savings within their IT architecture, and this is a perfect example of how the multiple capabilities of Project 2010 can address vital issues that might be considered non-PPM issues.

Common Challenges

Simply upgrading from Project 2003 Standard to Project 2010 and dozens of Project 2010 clients internally can be tricky. An experience and qualified partner can assist in guiding this migration.

Synchronizing data via integration between Project 2010 and LOB applications requires proper architecture and professional partner support.

Taking existing Excel and other reports and transferring the data directly into Project 2010 requires skilled IT configuration that internal sources may not possess.

In the last scenario with the global manufacturing industry entity, the organization did not factor in user training for Project Server 2010. A tool is only as good as its use. If the end user cannot function efficiently within the tool, fragmented workarounds will begin to appear.

Especially when blending multiple technologies into one system, licensing can be intricate and confusing. Organizations must ensure that adequate licensing is obtained for all components. Use of Microsoft Developers Network (MSDN) licenses to manage the Project 2010 production environment may not be sufficient.

Failure to take the appropriate technical and PPM-related training prior to system configuration and deployment is a common flaw in deployments. These complex systems require different role-based training tailored to job responsibilities and functions.

Inexperience with the system architecture or lack of appropriate hardware can result in poor system performance, as when an organization tries to run everything on one server.

PPM, whether utilizing one main technology platform or multiple system components, remains process driven. Having no staging system or change control processes in place will decrease efficiencies in execution and bottom-line dollars as projects spiral out of control and are not traceable in a meaningful way for the organization.

Technologies are always subject to tweaks and adjustments. If the organization does not apply cumulative updates and service packs as they become available, the system will break or have chasms that are prime territory for hackers.

Attempting to “boil the ocean” or “leap into the future,” often as a result of a senior management directive (e.g., “We need this new system online next month!”), can do more harm than good. Bells and whistles are shiny and attractive, but if the solution is not scaled to the organization’s current status, end users will become overwhelmed and strong ROI is not achieved.

Key Steps to Creating the Win

All organizations should consider engaging a qualified partner (i.e., partners that have obtained the PPM competency through Microsoft), but this is especially true of Level 0 or Level 1 organizations, as they are just beginning to form their PPM foundation. Work done at this critical stage will set the scene for successful PPM adoption across the enterprise.

Work with your Microsoft licensing specialists and value add reseller or large account reseller to ensure adequate licensing is in place concurrent with the deployment.

Ensure that adequate Microsoft Premier Support coverage is in place to enable assistance from Project Server technical support resources prior to the deployment.

Define a transition plan and then follow that plan. Watch for scope creep in this critical area. You will be much further ahead of the game if you do first things first. Again, a certified Microsoft Solution Partner has the experience (and battle scars) to ensure success.

Ensure that end users are adequately trained and have had hands-on experience with scenarios they are going to encounter on a daily basis. Making end users comfortable with the new tool will accelerate adoption.

Create end user documentation that describes the normal process flow. Detailed documentation remains a data-driven point of reference for future resources to learn from or for organizations to engage in continuous improvement.

Not everyone will know what to do next, especially if something goes wrong. Ensure that there are trained and identified support personnel to answer key questions as the system goes live. It will take a while to build up internal institutional knowledge

End users often will be able to learn from each other and provide valuable feedback to the system administrators and key PMO personnel about common issues and needs. An easy way to capture this information is to provide for brown-bag lunch training sessions.

Build a safe and friendly community around the new PPM solution. Very often new systems die before they generate any real value due to unresolved issues, data reentry and rework, and puzzling situations that no one seems to know how to resolve. Have a regular communications meeting about new capabilities and changes, so that end users are not surprised with new things that are coming at them. Such meetings also provide one-stop shops for vetting issues encountered by end users and will lessen the chance of ad hoc and disjointed fixes (kludges) being implemented.

Reward teams for successes. All too often we single out individuals for their efforts instead of sharing tribal wins. This can result in too many Level 0 heroics and hold back organizational maturity. There is also the risk that these people move on, taking valuable how-to knowledge with them when they leave.

Important Concepts Covered in This Chapter

It’s not just about the technology, the processes, or the people; it is all about ensuring that we have the best possible impact on the business. Therefore, we must address PPM from a business perspective.

Business leaders are now seeking information and knowledge management, BI, and analytic capabilities that are far beyond the current capabilities of their IT infrastructure. With the recent downturn in the economy, businesses are also being forced to reevaluate their current investments in IT, methods, and processes with which they will run their business in the coming decade. Information workers across the board are being asked to take on more and make do with a lot less.

These are only a couple of the key factors driving the need for better integrated work and resource management solutions. An ever-increasing competitive landscape and the associated time-to-market considerations are also driving the need for better end-to-end information and knowledge management.

With the addition of the SharePoint Server 2010 platform, integration and collaboration have been extended from within a single tool to an integral piece that is easily accessed throughout the organization. This portal for information and document collection creates organizational assets that will benefit at all levels of PPM but also aid in an organization’s growth and development.

Microsoft Project 2010, built on SharePoint 2010, introduces a new level of PPM technology to organizations and business users that far surpasses anything on the market today. In one connected package that keeps business at the core, Project 2010 enables efficient project execution and measurable ROI that will drive business forward on a strong platform into the next decade.

Key Summary Points

Key summary points are highlighted here to remind the reader of some of the vital considerations presented in this chapter.

* As PPM software has grown in size, scalability, and use, the infrastructure requirements have increased. Additionally, the collaborative elements with PPM technologies demand more from the organization’s systems, processes, and end users. What normally starts in IT expands to other groups and leads to additional of training, extensive consulting services, and ongoing system and process support. It truly is a culture change.
* Organizations are constantly working to improve the value of their investments. Regardless of the economic state or health of the particular organization, discretionary projects and initiatives receive significant scrutiny. How well money is spent and managed within initiatives determines not only the economic success of an overall strategy but also the personal success of those who put those initiatives into motion.
* Organizations are more volatile than previously anticipated[AU: OK?]. Due to the global economic changes of 2008 to 2012, a number of external factors have impacted the ability of organizations to select and adopt updated technology. This makes the choice of the appropriate technology essential in getting the most from the organization’s investment.
* Change occurs only when the environment is turbulent. Emerging markets globally are realizing growth trends because of an imbalance[AU: imbalance? In what?]. This flux pushes people out of their comfort zones. When the environment moves away from status quo innovation, updating and eventually change takes root.
* Much of the controversy around organizational maturity models stems from a mismatch between the amount and type of processes applied at each level and the organization’s basic cultural mental model (regardless if it is a volatile, stable, or turbulent market).
* If organizations attempt to push such changes too fast or too far, they often encounter cultural conflicts and wholesale rejection by all the concerned parties. The PPM maturity model enables senior management to avoid such problems. It provides a framework that can help facilitate communication with executive management by comparing their organization’s PPM processes and attributes to those in the Gartner model.

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