

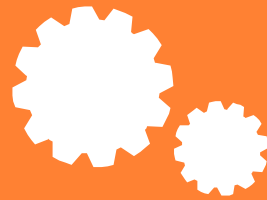
How to Streamline Project Management at Your Company





To finish a project on time and within budget while also delivering high-quality results, it is crucial to have the right combination of competence and tools with planning, control and monitoring. This is true regardless of the field you work in or the field where your project is taking place.

This combination of efforts will guarantee the best chances of success for a project and will also result in more productive employees, more profitable engagements and increased client satisfaction.



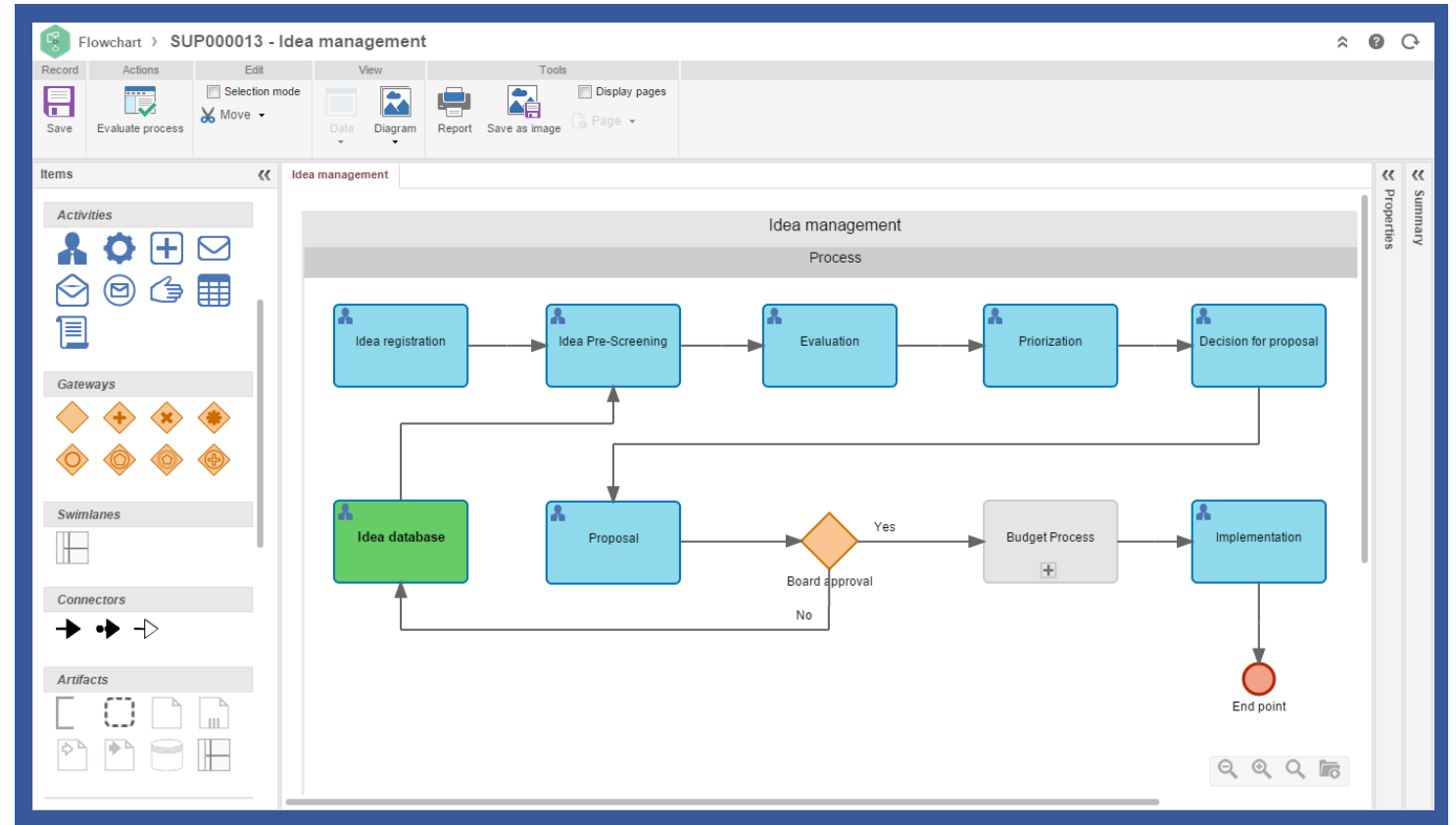
The upcoming pages will show you the main aspects where you should focus your efforts to streamline projects and increase your chances of success.

01 | Collect and Manage New Ideas

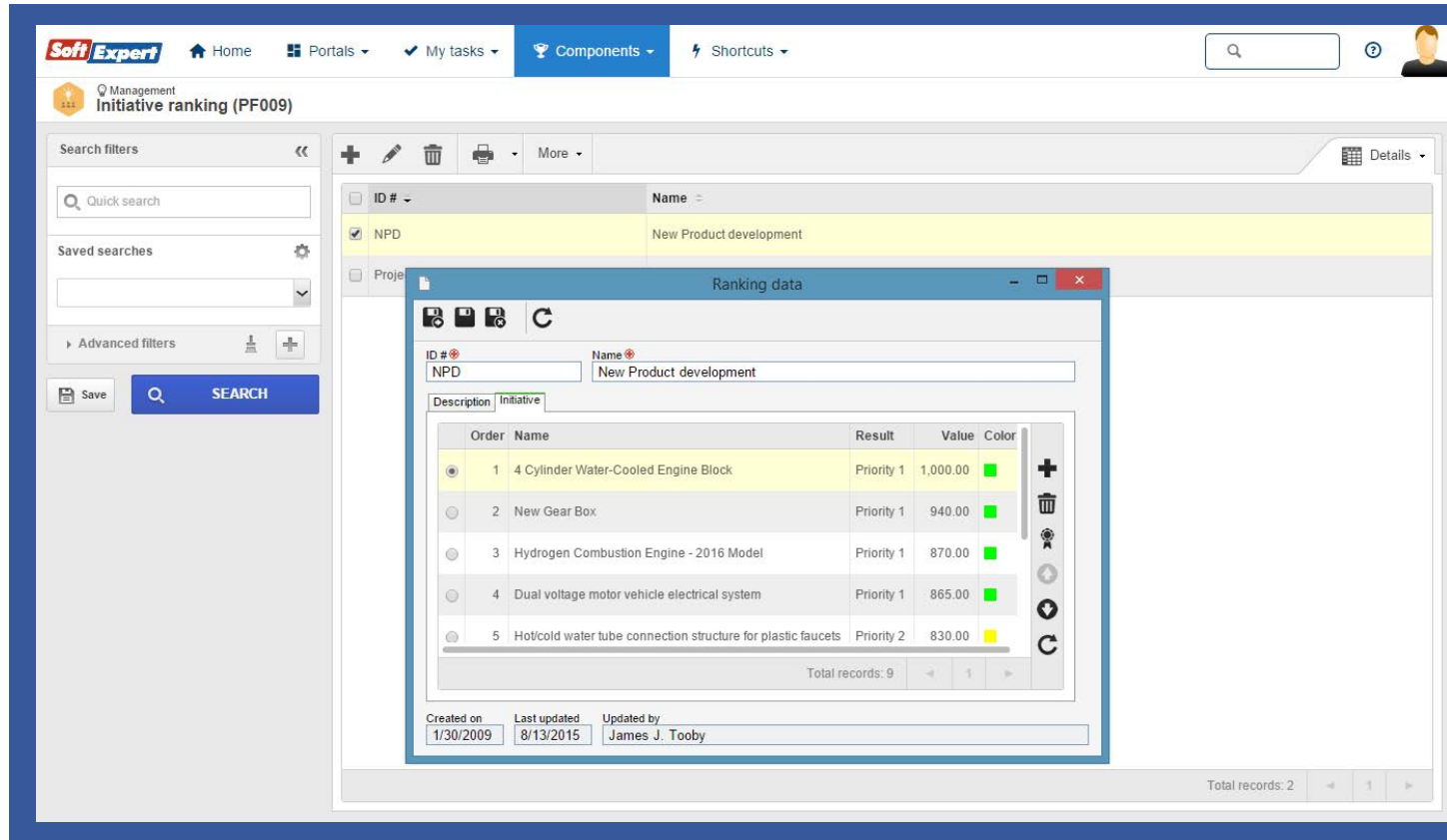
The first piece of advice to streamline project management is: **Manage Demand**. Put a process in place to collect new ideas internally and project suggestions and needs during portfolio creation. By aggregating ideas into a process, you will be able to systematically and consistently evaluate investment priorities.

This should be assigned as a responsibility to a specific team and should also be treated as a particular matter so it can be properly analyzed and managed.

The goal is to prioritize and select a demand that is both valuable and aligned with the organization's strategy. The more information the process is able to gather, the better the chances of building a successful portfolio will be.



02 | Identify, Prioritize, Balance and Manage Initiatives



The screenshot displays the 'Initiative ranking (PF009)' interface in the Soft Expert application. The main window shows a list of initiatives, with 'NPD' (New Product development) selected. A 'Ranking data' dialog box is open, showing a table of initiatives with their respective priority scores and values.

Order	Name	Result	Value	Color
1	4 Cylinder Water-Cooled Engine Block	Priority 1	1,000.00	Green
2	New Gear Box	Priority 1	940.00	Green
3	Hydrogen Combustion Engine - 2016 Model	Priority 1	870.00	Green
4	Dual voltage motor vehicle electrical system	Priority 1	865.00	Green
5	Hot/cold water tube connection structure for plastic faucets	Priority 2	830.00	Yellow

The dialog box also includes fields for 'ID #', 'Name', 'Description', and 'Initiative'. At the bottom, it shows 'Total records: 9' and a pagination control. The main window also displays 'Total records: 2' and a pagination control.

Next, **identify, prioritize, balance, and manage** the mix of initiatives that offers the greatest contribution to the strategic investments of your company.

Determine priority scores to effectively evaluate every competing investment in order to optimize the company's resources and allocate them to the highest valued opportunities.

Furthermore, simulate and analyze different scenarios to ensure they are working on the right innovative projects and in the right strategic areas.

03 | Make Risk Management Part of Your Project

After qualifying our initiatives, we now move on to risk management. Managing risks is a crucial part of streamlining project management.

Not only must you be able to **identify what could go wrong**, but you must also be able to identify **the probability of it occurring, its impact and its treatment**.

Create a risk strategy that will cover all aspects of the risk management process, from initial risk identification, through risk assessment and evaluation, to risk mitigation and monitoring, managing incidents and ensuring appropriate follow-ups and integrated reporting.

The screenshot displays a risk management software interface. The main window shows a list of risks under the heading "Plano: 004.003000001 - Pedido de Compra". The risks are listed with their identifiers, descriptions, and risk levels (Real, Pont. real, S). The risk #00004 - Cotação superestimada is highlighted in yellow.

Plano	Real	Pont. real	S
004.003000001 - Pedido de Compra			
001000002 - Solicitação de Compra			
#00002 - Termos de compra padrão não definidos para o fornecedor	Médio	4,00	
#00001 - Bens/Serviços comprados de fornecedores não autorizados	Baixo	2,00	
#00001 - Solicitações são revisadas na etapa de análise de solicitações			
001000003 - Material ou Serviço?			
001000004 - Verificar nível de estoque no ERP			
#00003 - Concessão de acesso à usuário que não necessita deste perfil	Baixo	1,00	
001000001 - Quanto?			
#00004 - Cotação superestimada	Alto	6,00	
#00003 - Orçamento aprovado pela gerência			
#00004 - São exigidos orçamentos com três fornecedores diferentes			
001000010 - Recebimento			
#00005 - Recebimento de quantidade diferente da contratada	Médio	3,00	
#00005 - Sistema de gestão de inspeção			

The right panel shows the details of the risk #00004 - Cotação superestimada. It includes a risk matrix and a table of criteria and results.

Identificador	Revisão	Avaliação
Rev 0 (05-2015)	29/05/2015	

Risk Matrix:

	Baixa	Média	Alta
Impacto Baixo			
Impacto Médio			
Impacto Alto			

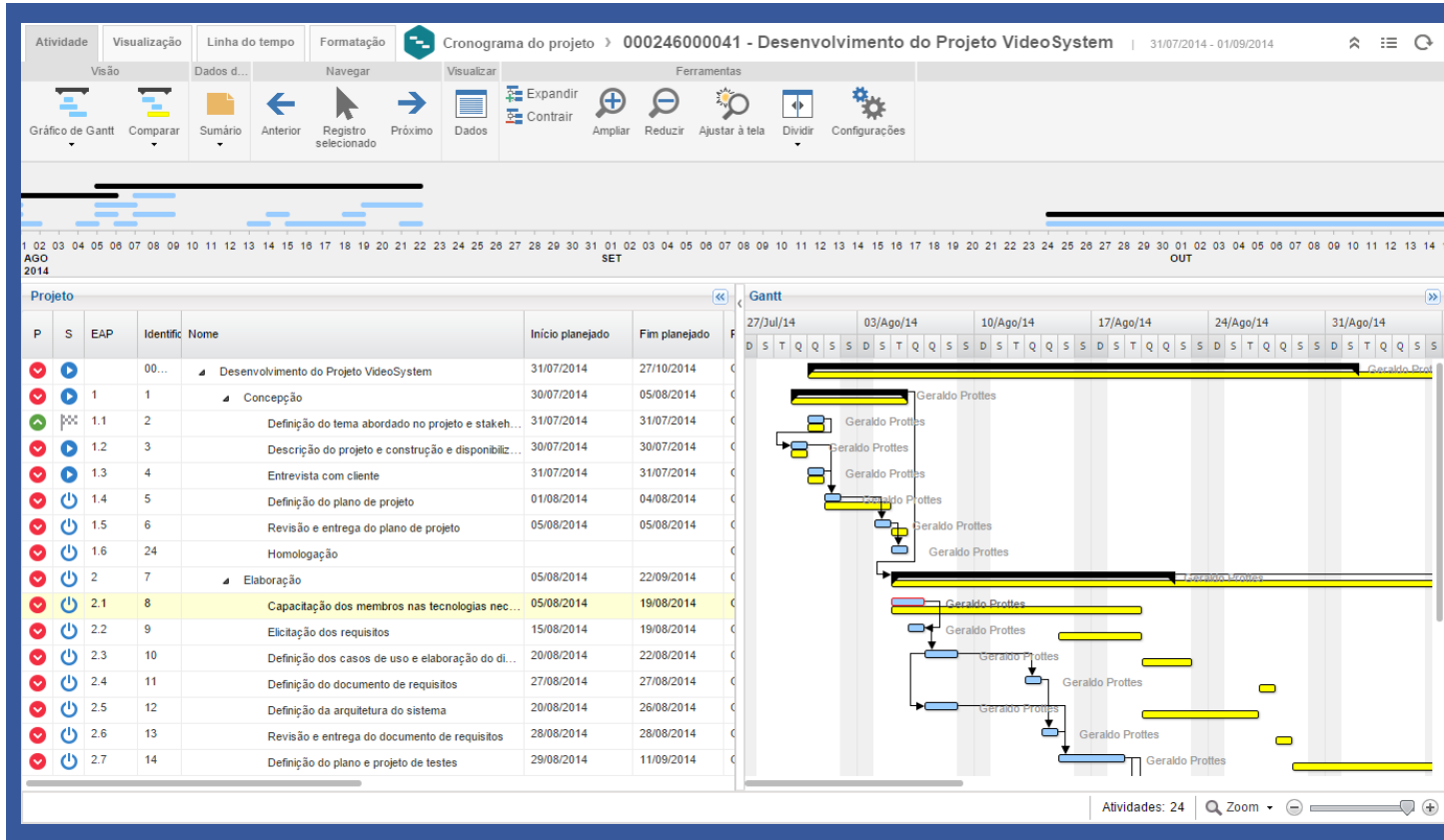
Criteria and Results:

Real	Justificativa	Anexo	Documento

Criteria and Results:

Critério	Resultado
Probabilidade	Média
Impacto	Alto

04 | Focus on Task Efficiency



Next, we must focus on task efficiency. As we all know, projects are made up of a compilation of tasks, and the secret to streamlining your project is how these tasks are managed.

To be efficient, **manage your tasks in groups** and keep a balanced workload so you can adjust or delegate tasks and deadlines so you and your team are not overworked.

A project management software that allows you to **automate your tasks** is also extremely important. This allows you to make a list of all required tasks and prioritize them.

By prioritizing your tasks, you will be able to focus on what needs to be done and when it needs to be completed, instead of being distracted by less significant activities.

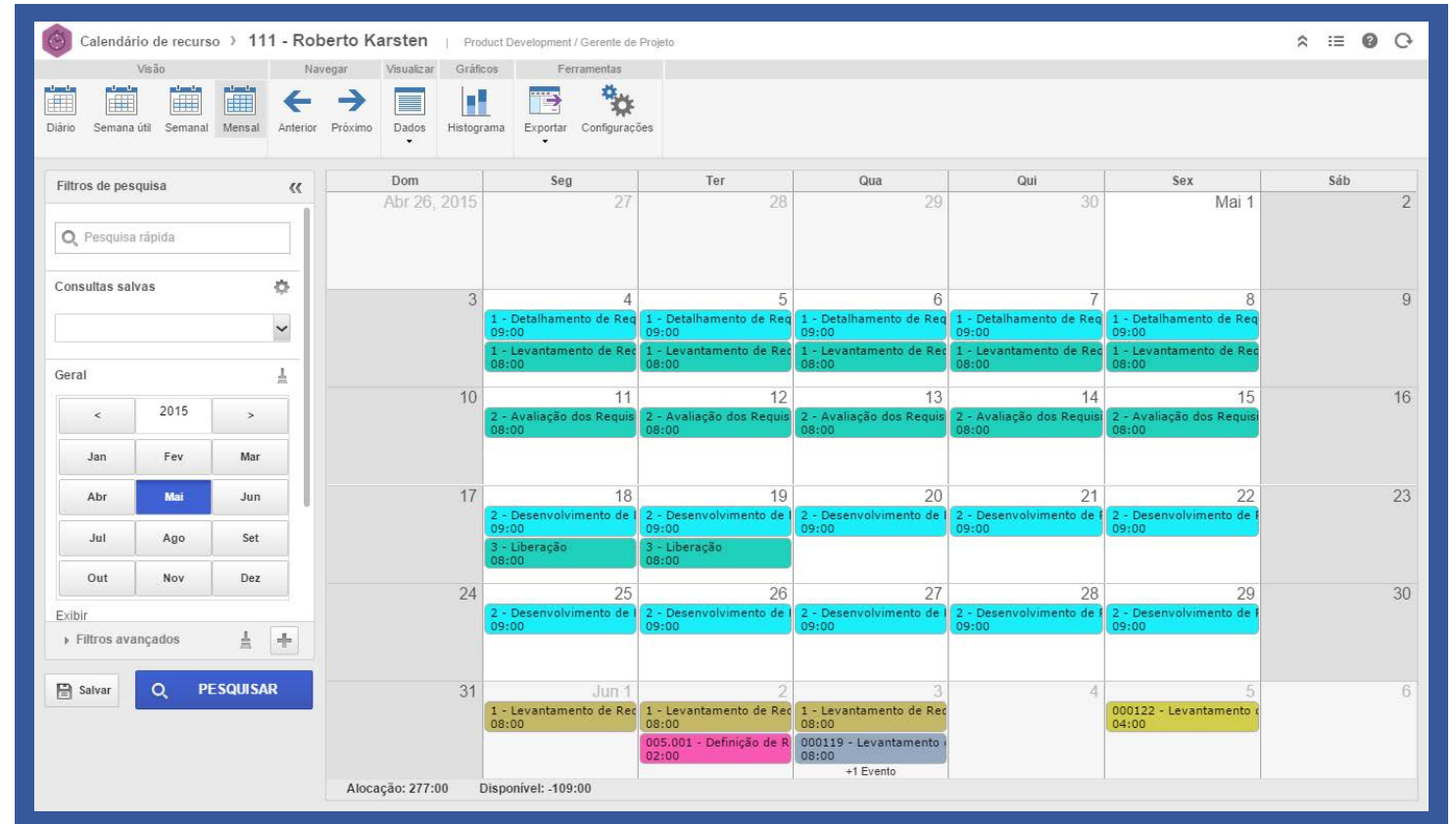
05 | Have a Resource Allocation Plan

At this time, we move on to managing our resources. An organization's resources are made up of **people, materials, equipment, knowledge and time**.

Since resources are usually limited, a resource allocation plan is very important to streamline your project.

A resource allocation plan will **determine what type of resources will be needed and when these resources will be used** in order to complete a task.

Make sure your allocation plan is flexible enough to accommodate changes that occur to the project schedule and resource demands.



06 | Manage and Control Resource Usage

The screenshot displays a software interface for resource management. At the top, the user is identified as '48917023 - Tarso Silveira' with the role 'Diretoria Financeira / Diretor'. The interface includes a top navigation bar with tabs for 'Registro', 'Ações', 'Editar', 'Navegar', 'Visualizar', and 'Ferramentas'. Below this is a search bar and a table of activities.

SE	TO	Atividade	Objeto	Seg [22/06]	Ter [23/06]	Qua [24/06]	Qui [25/06]	Sex [26/06]	Sáb [27/06]	Dom [28/06]	Total
Construção do Bloco H											
1 - Fundação				04:00	01:00						05:00
(1 Atividade)				04:00	01:00						05:00
Desenvolvimento do Projeto VideoSystem											
3 - Descrição do projeto e construção e disponibilização do sistema				03:00	01:30						04:30
(1 Atividade)				03:00	01:30						04:30
Execução de Treinamento											
000127 - Execução de Treinamento					04:35						04:35
(1 Atividade)					04:35						04:35
Pequenas Melhorias											
1 - Detalhamento de Requisitos											
(4 Atividades)											

Objeto: Execução de Treinamento | Atividade isolada: 000127 - Execução de Treinamento

Entrada	Saída	Extra	Total	M	S
08:00	09:00		01:00		
13:30	15:50		02:20		
16:45	18:00		01:15		

At the bottom, there is a section for 'Descrição', 'Justificativa', 'Observação', and 'Solicitação' with a large text area for notes. A counter '0/15000' is visible at the bottom right of this section.

Next, you must be able to manage and control resource usage. To optimize the process, you must be able to **record and track time, billing and scheduling**, which will increase operational performance and reduce costs.

As a result, you will be able to easily perform resource time tracking against any job, choose the right resource according to the desired role or competence, enter billable and non-billable time and compare expected revenue to the total cost of the task.

07 | Define a Budget and Control Costs

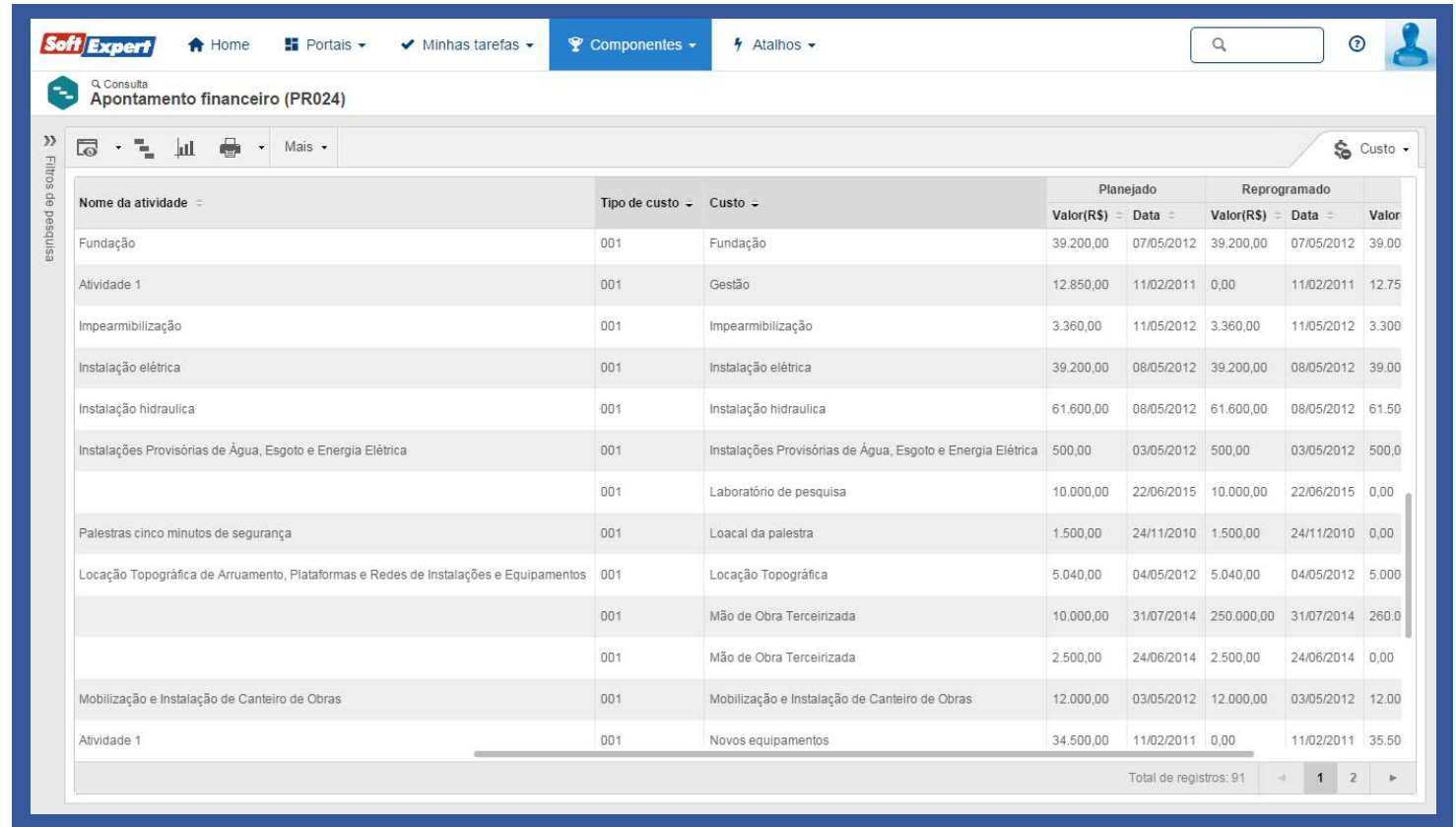
Now we're at the point where we can focus on our project's finances.

Managing your project's finances is one of the most important aspects of any project, and most companies judge the **success or failure of your project based on this criteria.**

One of the biggest aspects of financial project management is your project's budget. A project budget is the total projected cost to complete a project during a specific period, with a specific result.

In your budget, make sure you include:

- Direct and Indirect Costs
- Fixed and Variable Costs
- Labor, Materials and Equipment
- Travel and Licenses (if required)



The screenshot displays the 'Apontamento financeiro (PR024)' screen in the Soft Expert application. The interface includes a top navigation bar with 'Home', 'Portais', 'Minhas tarefas', 'Componentes', and 'Atalhos'. A search bar and user profile icon are on the right. The main content area features a table with columns for activity name, cost type, cost, planned value, planned date, reprogrammed value, reprogrammed date, and total value. The table lists various project activities such as 'Fundação', 'Atividade 1', 'Impermeabilização', 'Instalação elétrica', 'Instalação hidráulica', 'Instalações Provisórias de Água, Esgoto e Energia Elétrica', 'Laboratório de pesquisa', 'Palestras cinco minutos de segurança', 'Locação Topográfica de Arruamento, Plataformas e Redes de Instalações e Equipamentos', 'Mão de Obra Terceirizada', 'Mobilização e Instalação de Canteiro de Obras', and 'Novos equipamentos'. The bottom of the table shows a total of 91 records.

Nome da atividade	Tipo de custo	Custo	Planejado		Reprogramado		Valor
			Valor(R\$)	Data	Valor(R\$)	Data	
Fundação	001	Fundação	39.200,00	07/05/2012	39.200,00	07/05/2012	39,00
Atividade 1	001	Gestão	12.850,00	11/02/2011	0,00	11/02/2011	12,75
Impermeabilização	001	Impermeabilização	3.360,00	11/05/2012	3.360,00	11/05/2012	3,300
Instalação elétrica	001	Instalação elétrica	39.200,00	08/05/2012	39.200,00	08/05/2012	39,00
Instalação hidráulica	001	Instalação hidráulica	61.600,00	08/05/2012	61.600,00	08/05/2012	61,50
Instalações Provisórias de Água, Esgoto e Energia Elétrica	001	Instalações Provisórias de Água, Esgoto e Energia Elétrica	500,00	03/05/2012	500,00	03/05/2012	500,0
	001	Laboratório de pesquisa	10.000,00	22/06/2015	10.000,00	22/06/2015	0,00
Palestras cinco minutos de segurança	001	Local da palestra	1.500,00	24/11/2010	1.500,00	24/11/2010	0,00
Locação Topográfica de Arruamento, Plataformas e Redes de Instalações e Equipamentos	001	Locação Topográfica	5.040,00	04/05/2012	5.040,00	04/05/2012	5,000
	001	Mão de Obra Terceirizada	10.000,00	31/07/2014	250.000,00	31/07/2014	260,0
	001	Mão de Obra Terceirizada	2.500,00	24/06/2014	2.500,00	24/06/2014	0,00
Mobilização e Instalação de Canteiro de Obras	001	Mobilização e Instalação de Canteiro de Obras	12.000,00	03/05/2012	12.000,00	03/05/2012	12,00
Atividade 1	001	Novos equipamentos	34.500,00	11/02/2011	0,00	11/02/2011	35,50

Total de registros: 91

08 | Secured & Controlled Project Documents

The screenshot displays the Soft Expert Document Management System interface. The top navigation bar includes the Soft Expert logo and menu items: Home, Portais, Minhas tarefas, Componentes, and Atalhos. The main header shows the current document type: Documento (DC003).

On the left, there is a sidebar with search filters (Filtros de pesquisa) containing a search bar with the text 'contrato', a section for saved consultations (Consultas salvas), and a section for document types (Tipo) with a 'Selecionar tipo' button. Below this are advanced filters (Filtros avançados) and buttons for 'Salvar' and 'PESQUISAR'.

The main content area features a toolbar with icons for document actions (add, edit, delete, view, print, etc.) and a table listing documents. The table has columns for selection, flags (F, SD, AE, AD), category (Categoria), identifier (Identificador), title (Título), revision (Revisão), date (Data), and hits (Hits).

	F	SD	AE	AD	Categoria	Identificador	Título	Revisão	Data	Hits
<input checked="" type="checkbox"/>	★	⚙️	📄	👤	CNT	CNT/2014/0025	Contrato Social 0025	00	16/09/2014	3
<input type="checkbox"/>	★	✅	📄		CNT	CNT000001	Contrato de Manutenção S&T DYNAMICS	00	29/08/2014	0
<input type="checkbox"/>	★	🔄	📄	👤	CNT	CNT003	Contrato de Garantia GILDEMEISTER DMC-60S	00	29/08/2014	0

Below the table, there is a section for document preview (Exibir Pré-visualização) with a 'Scaling' dropdown set to 100%. The preview shows a document from 'Acme' titled 'ACME Serviços de assessoria e tecnologia LTDA' and 'CONTRATO DE CONSTITUIÇÃO DE ACME Serviços de assessoria e tecnologia LTDA'. The document content includes two entries:

1. Mauricio Fonseca, Brasileiro, Solteiro, Analista de Sistemas, portador da carteira de identidade(RG) nº 2.154.783, e CPF nº 007.026.558-00, residente e domiciliado na Rua Tijucas, 151 – Centro - Joinville/SC e
2. Erivelto Bruske, Brasileiro, Casado, Analista de Negócios, portador da carteira de identidade(RG) nº 3.903.020, e CPF nº 034.468.524-00, residente e domiciliado na Rua das Bromélias, 959 – Centro -

The preview also shows a page indicator 'Page 1 of 2' and a '100%' zoom level.

Next, we must focus on managing our project's documents and content.

Projects generate incredible amounts of documentation, such as proposals, financial reports, purchase orders, contracts, quality documents, engineering drawings, forms, announcements, e-mails and so on.

Management, delivery and control of documents are critical to any project. Project Managers can't create and deliver project value without proactively managing the documents that support their initiatives.

Furthermore, documents must not only be intelligently moved throughout an organization to support day-to-day project activities, but they **must also be secured and controlled**, end-to-end, to protect corporate assets and avoid possible litigations.

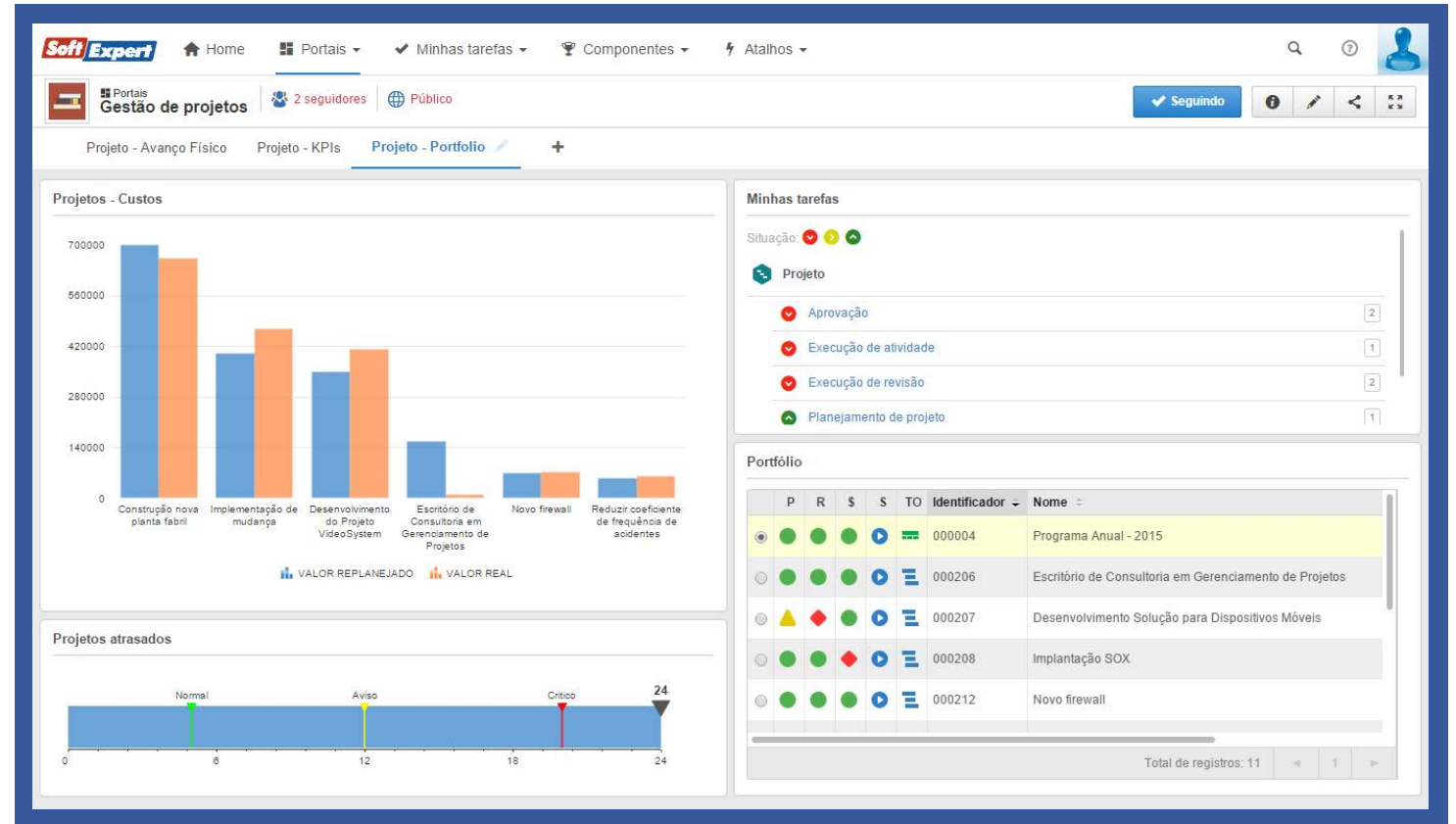
09 | Extract Trends and Patterns

The last part of streamlining project management involves focusing on analyzing and monitoring our project's data.

Along with creating a vast amount of documents, **projects also create a vast amount of data**. But what good is all that data if you don't analyze it and manage accordingly?

To streamline your project, you must be able to **extract any trends and patterns buried in the data, arrange them, summarize them, perform comparisons, and extract meaningful information that can be priceless to the organization**.

To make it easier to understand data, make extensive use of visual aids such as different types of **dashboards, graphs, charts, tables and analytical reports**.



Now that you know **How to Streamline Project Management in Your Company**, find out more about the most complete and innovative solution in the market for project and portfolio management, regulatory compliance and business excellence.

SoftExpert PPM

SoftExpert's Project and Portfolio Management (PPM) software is the most comprehensive solution for prioritizing, planning, managing and executing projects, portfolios and business initiatives. This software helps organizations streamline and complete projects on time and within budget by enabling project managers and team members to optimize time and deadline scheduling, resource utilization, milestones and completion of deliverables, cost and revenue accounting, etc.

SoftExpert Excellence Suite



SoftExpert Excellence Suite is the most comprehensive framework of independent yet united solutions to achieve business performance excellence, streamline corporate governance, risk and compliance programs, and ensure continuous business process improvement.

Companies may not need all applications at once, or may want to deploy one application module at a time, growing gradually as the need arises. Whatever the strategy chosen, only a fully shared environment allows its applications to fit together like puzzle pieces and work seamlessly.

About SoftExpert

SoftExpert is a market leader in software and services for enterprise-wide business process improvement and compliance management, providing the most comprehensive application suite to empower organizations to increase business performance at all levels and to maximize industry-mandated compliance and corporate governance programs.

Founded in 1995 and currently with more than 2,000 customers and 300,000 users worldwide, SoftExpert solutions are used by leading corporations in all kinds of industries, including manufacturing, automotive, life sciences, food and beverage, mining and metals, oil and gas, high-tech and IT, energy and utilities, government and public sector, financial services, transportation and logistics, healthcare, and many others.

SoftExpert, along with its extensive network of international partners, provides hosting, implementation, post-sales support and validation services for all solutions to ensure that customers get the maximum value from their investments.



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