Project and Portfolio Management Quick Flow Demo Card

SMA-X 2017.11

# Background

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| Key Messages | Project portfolio management software is aimed at improving project management efficiency by cataloguing all the projects in the IT queue and helping the Project Management Office to manage their projects’ lifecycle and generating automated conclusions, based on input information (spending, time frame, employee resources needed, etc.), to prioritize and staff.  With the project portfolio management capabilities, you can easy manage your investment in different phases, from idea to proposal to project and program.  The Executive summary can provide a centralized visual to help the PMO track multiple projects/programs/portfolio, from the budget/cost/roadmap/risk monitoring perspectives |
| Customer Challenge | * How can I manage multiple projects/programs? * How can I capture innovation ideas from my business unit? * What is the current health of my project/program/portfolio? |
| Engage Them | * Need an Executive dashboard to monitor your portfolios’ overall status? * Capture innovative ideas from your business unit and turn them into proposals. * Use a single tool to manage your projects, programs and portfolio easily. |
| Differentiators | * Lower costs by using a single tool to capture and monitor ideas, proposals, projects, programs, and portfolio as well as the traditional ITSM and ITAM functions. * Analyze proposals to prioritize investment based on planned cost versus business value * Optimize overall portfolio investment (separate demo card) * Capture innovative ideas from the business (separate demo card) |

# Quick Flow

Quick flow is to provide a benefit oriented overview, to introduce customer to value and should be completed in ~5-10 minutes. Optional sub-flows are below. Make sure your environment is ready – see demo set up below. After practicing and perfecting the flow, you might want to copy and paste the rightmost Cheat Sheet column (below) to serve as a printed or electronic guide to the demo.

| **Do** | **Say** | **Cheat Sheet** |
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| **Executive Summary**   * Login as Jennifer.falconmf * Project & Program Mgmt > Executive Summary Page offers a tree structure on the left * Select the “HR PeopleSoft Consolidation (HR and Payroll) Portfolio” (name, not link) which has an overall status of yellow * 4 charts for Portfolio items: planned cost, budget, resource demand, risk and issue. Review the data in the chart * Expand the “HR PeopleSoft Consolidation (HR and Payroll)” Portfolio in the Explorer window on the left (click the right arrow) and select the red program (row not link): “HR Program Harmonization (HR and Payroll)”, * 5 charts for program items: planned cost, budget, resource demand, risk and issue, timeline. Review the data in the charts * Notice that there are critical risks in the “risk and issue” chart * Click the program’s link, navigate to the risk tab, and check the detail risk information. | The Executive Summary provides an easy-to-use, consolidated, executive view to oversee your complete portfolio and to track many projects and programs.  There are three levels of hierarchy (Portfolio, Program, Project) with drill-down navigation to see:   * Monitor overall health: risk/issue/health status * Monitor KPIs: resource demand, cost, budget | * Executive Summary * “HR PeopleSoft Consolidation (HR and Payroll) Portfolio” * Review 4 charts for Portfolio * Expand “HR PeopleSoft Consolidation (HR and Payroll)” Portfolio * “HR Program Harmonization (HR and Payroll)” Program * Review 5 charts for program * Click: “HR Program Harmonization Project (HR and Payroll)” program link * Risks tab, and check the detail risk information. |
| **Manage Project**   * From this Program, go to the Contents tab to see the projects. * Click the link to the ULN Integration Project. * Click Timeline tab, add some phases and milestones to activate the project. * Click Resource Demand Tab to edit resource demand * Click Financial Summary to edit cost/budget/benefit * Click the Risk tab, add risk for the project * Click the Issue tab, add issue for the project * Click the General tab, set the health, and then save it. * Move to the Execute phase. | For a project, you use the Timeline to identify milestones and phases to track the project status.  In resource demand, you may have noticed that the resource demand in proposal was copied to project.  In the financial summary, you can manage approved budget, planned cost and forecasted benefit.  Also you can manage risks and issues for the project. | * Program, Contents * “ULN Integration Project” * Timeline tab, add phases and milestones and activate it. * Click Resource Demand Tab to edit resource demand * Click Financial Summary to edit cost/budget/benefit * Click the Risk tab, add risk for the project * Click the Issue tab, add issue for the project * Click the General tab, set the health, and then save it. * Move to the Execute phase. |

# Optional Sub Flows

Customer intrigued after seeing this overview? Ideas for possible sub-flows/drill-downs:

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| **Create Program**   * Programs, New * Fill in the title as *“e-banking - Agile Release 15.4 Program xx” (xx are your initials)*, description, start date, end date, Save * Set the Manager to yourself then save it. * Click the Contents tab, then click the add button, global search “*“e-banking Secure Email in Agile - Inbox Sort Order Project*”, and add the proposals, projects to the Program. * Navigate to the financial summary tab, add budget for the program | If you want to manage multiple projects or proposals at a centralized level, you can create program and add projects and proposals as content. | * Program, New * Fill in the title as *“e-banking - Agile Release 15.4 Program”*, description, start date, end date, Save * Set the Manager to yourself then save it. * Click the Contents tab, then click the add button, global search “*“e-banking Secure Email in Agile - Inbox Sort Order Project*”, and add the proposals, projects to the Program. * Navigate to the financial summary tab, add budget for the program |
| **Create Portfolio**   * Create a project portfolio named: “e-banking – Agile Release Phase II portfolio xx” * Click the Financial Summary tab, add budget for the portfolio * Click the contents tab, then click the add button, global search “*e-banking - Agile Release 15.4 Program*”, and add the programs, projects and the proposals to the portfolio. * Select the general tab, set the health, and then save it. | You can group your investment together at the strategic level by creating a Project Portfolio. You can add proposals, projects and programs to the portfolio for effective management.  To manage appropriate investment in your portfolio item, you will also need to manage the roadmap, risk and issue.  You can create Programs in the same manner. | * Create a project portfolio named: “e-banking – Agile Release Phase II portfolio” * Click the Financial Summary tab, add budget for the portfolio * Click the contents tab, then click the add button, global search “*e-banking - Agile Release 15.4 Program*”, and add the programs, projects and the proposals to the portfolio.   Select the general tab, set the health, and then save it. |

# Demo Preparation

Demo data prep includes initial set-up tasks and items that must be checked before each demo (e.g., demo data changes over time, or to return to the pre-demo state). Be mindful of whether the changes are appropriate or needed for the demo tenant you’re using – e.g., for the shared demos, initial set-up is probably already done, and some changes shouldn’t be applied (e.g., theme)

## Initial Set-up

* None

## Pre-demo Checklist (in addition to above)

* None