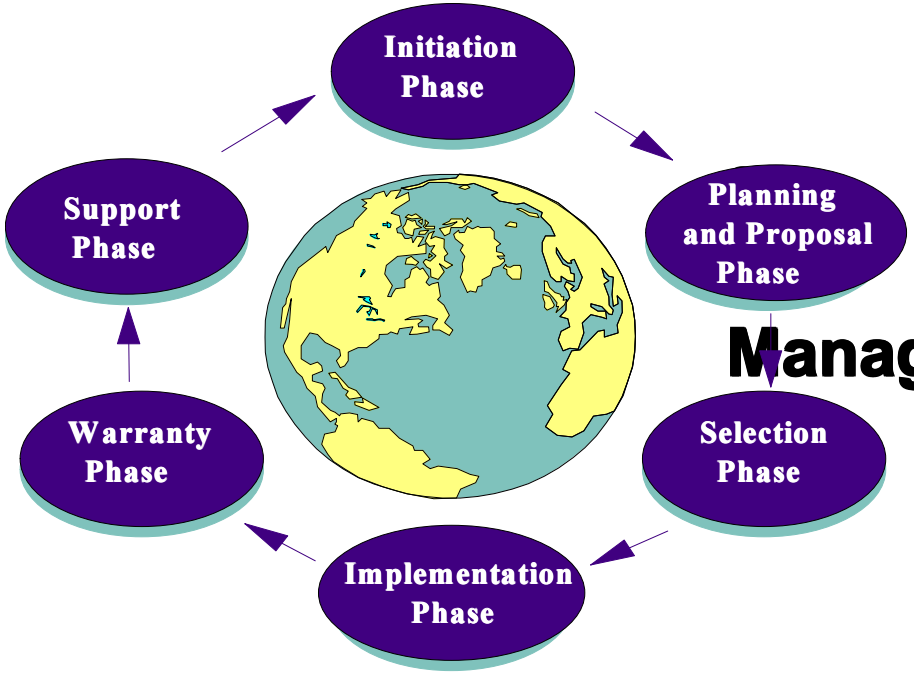
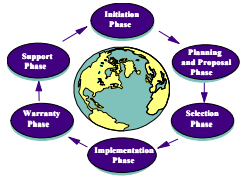
Applying FocusPM



Non-Project Managers

WORLD-WIDE PROJECT MANAGEMENT METHODOLOGY

FocusPM

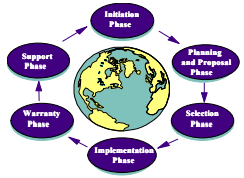


Today's Topics

- Project Management Initiative
- History of Development
- Content and Strategy
- Required inputs to FocusPM
- Key Business Points
- Methodology Overview
- Benefits of FocusPM
- Why choose HP?

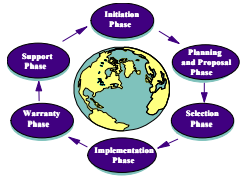
"FocusPM: It will change the way we do business." Jim Sherriff

Current State



- The size and complexity of solution projects have been consistently growing
- Different result while delivered by different PM (even excellent)
- Project Managers use methodologies inconsistently
- Best practices are not captured, shared, or reused
- The Project Manager's role, responsibility and authority are not clearly defined
- Client dissatisfaction and low profitability are issues in many projects

Future State

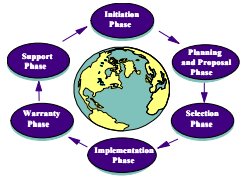


- Projects are a major contributor to our profitability
- Clients perceive our Project Management as one of HP's competitive advantages
- The Project Manager is perceived as a highly desired job with HP with clear authority and responsibility to make projects a success
- Using a single global methodology and tools contribute to successful projects
- Knowledge capture and reuse greatly increase the effectiveness of our Project Managers

Initiation Phase
Planning and Proposal Phase
Selection Phase
Implementation Phase
Warranty Phase
Support Phase

General Manager
HP PSO
"Jim Sperritt,
projects
accountability for solution
have full authority and
Project Managers to
"We will empower

Project Management Initiative



Objective 1:

- Enable the implementation of a consistent Project Manageme methodology world-wide

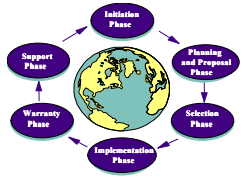
Objective 2:

- Clearly define role and authority as well as measures, rewards, and scoping of Project Managers

Objective 3:

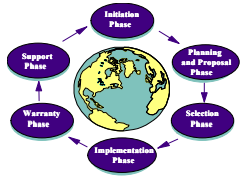
- Rapidly enhance our Project Management capability through development and hiring

Role of Project Manager



- Responsible for **profitability (scope / terms & conditions / cost / schedule)** of project
- **Key role in selling process** -- qualifying project and recommending GO / NO GO
- Assesses and manages **risk** during selling and delivery process
- Manages **project team** during the project
- Manages **relationship** between clients and HP / partners / subcontractors
- Major relationship with **CBM, CBL & Principal Consultant** in pre-sales
- **Drives the success of the project**

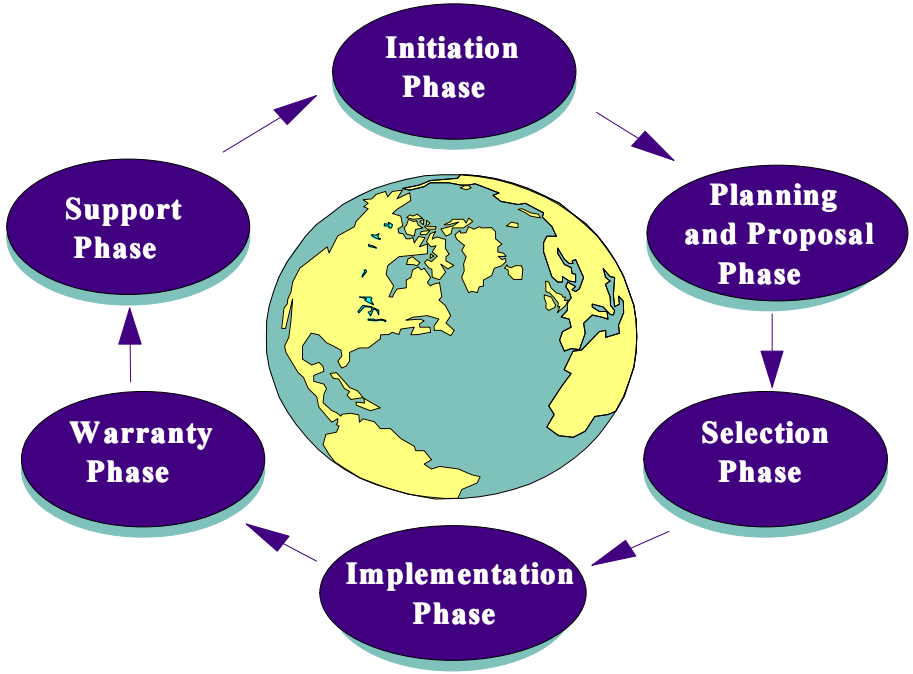
PM's are Empowered to:



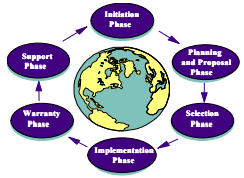
- Have sole accountability for profitability of projects
- Have a major responsibility in the selling process
- Have authority to be the only manager of project delivery
- Have authority to be the major interface to client during the project

è Does **NOT** mean that Project Manager is the most important person for project success -- entire HP Team is important for project success

WORLD-WIDE PROJECT MANAGEMENT METHODOLOGY FocusPM

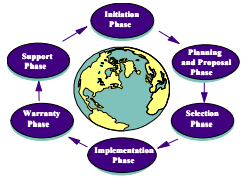


History of Development



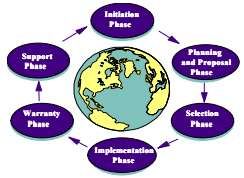
- Project Managers asked for a more professional methodology for planning and implementing projects
- Based on previous principle (CPLC) & HP best practices
- November 1996 initial strategy,January 1998 Final Review
- WW Review Team

Compared to Previous Methodology



- Is consistent with the Project Management Institute's (PMI & Prince2 standards)
- Incorporates HP best practices
- Provides rigor and detail in the planning phases
- Includes a robust toolkit in the planning and implementation phases
- Meets the need of Project Managers to manage increasingly larger and more complex projects

Benefits of FocusPM



- Improved HP bottom line by cutting losses on projects

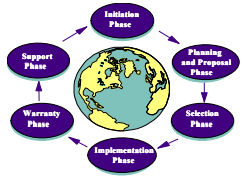
- Ensures consistent world-wide approach to client projects (will be used by HPC, ISBU, and OSD)

- Developed under leadership of global HPC/ ISBU Steering Committee
- Incorporates WW HPC/ ISBU best practices and industry standard

  Project Management methods and terminology (PMI and Prince2)

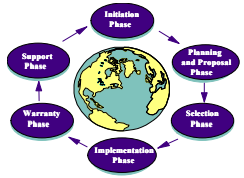
- Can be used for any type of project (Scaleable)
- Provides a full set of forms, tools and templates
- Includes a rigorous process for assessing / managing risk

Components of FocusPM



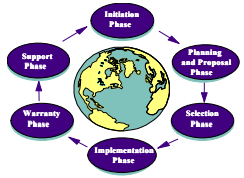
- **Documentation**
  - Methodology Guide (Phases / Activities / Tasks)
  - Reference Manual (Processes and Techniques)
  - Toolkit (Forms, Templates and Examples)
  - Quick Reference Card (Quick Overview)
- **Electronic Tools**
  - Guide, Manual and all Tools on the Web
  - Continuous Improvement accessed through the Web
  - Web based Knowledge Sharing (Project Snapshots and Best Practices)
  - Documentation Management System (under investigation)
- **Training and Communication**
  - 'Applying FocusPM' for Project Managers - 2 days
  - 'Applying FocusPM' for Non-Project Managers - 1/2 day
  - Internal Presentations for HPC and Sales
  - External slide set
  - Sales slide set
  - Web based training - Qtr 3 (Virtual University)

Key Strategies

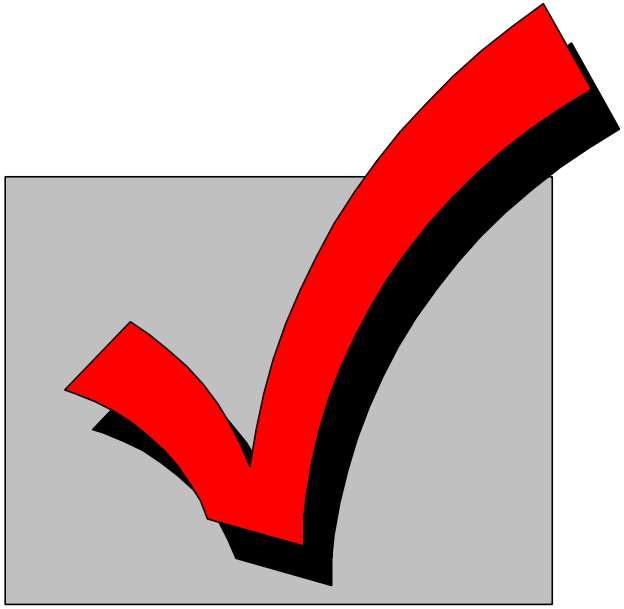


- Consistent quality criteria and measures
- Knowledge sharing and re-use (Project Snapshots)
- Sequence of activities and tasks
  (Bid Plan, Design, Plan, Propose, Negotiate)
- PM process measurements by phase, i.e., Quality Reviews
- Quality reviews - process and content (local process)
- PM Methodology for Project Managers
- Scaleable: Use on all projects

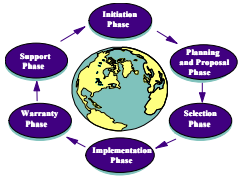
Quality in FocusPM

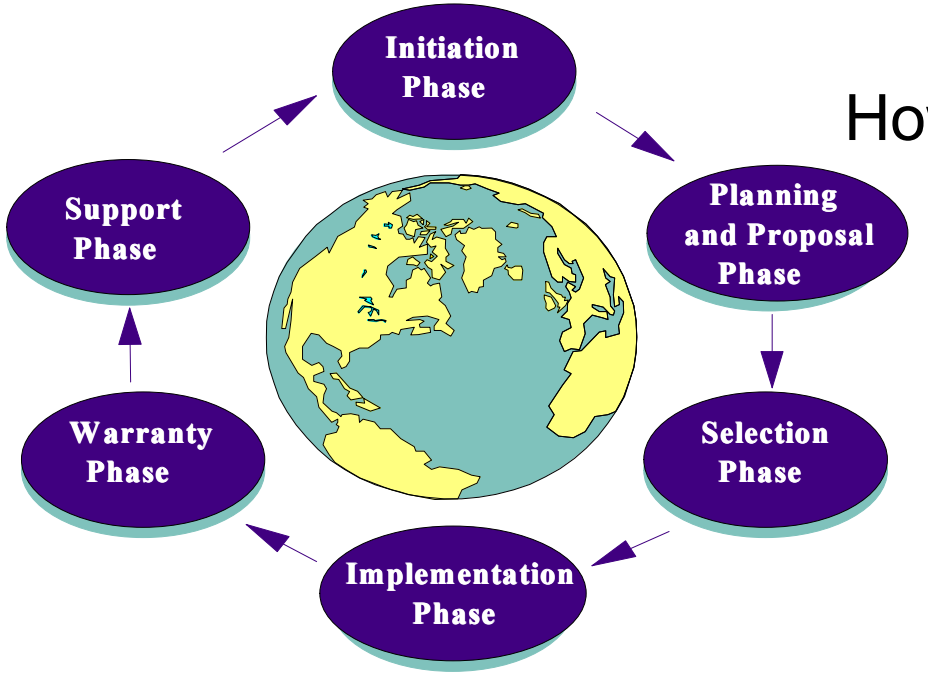


- Review Criteria for each Tool / Output
- Quality reviews in each FocusPM Phase and Activity



FocusPM: Scaleable for All Projects





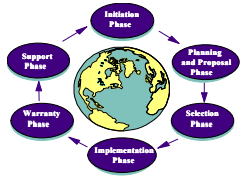
How?

Very large, complex project

Medium-sized project

Small project

Methodology Structure of FocusPM



Phase

↓

Activity

↓

Input → Task → Output* (Tools)

↓

Process

* Don't confuse "Output" with Client Deliverables

FocusPM Methodology Overview

PHASE

Activities

1.1 Appoint Project Manager

1.2 Estimate Bid Effort of Engagement

1.3 Perform Quality Review of Engagement

1.4 Request Authorisation to Bid

Activities

2.1 Prepare Technical Solution

2.2 Develop Project Scope Statement and WBS

2.3 Develop Project Schedule

2.4 Establish Project Resource Requirements

2.5 Develop Project Risk Management Plan

2.6 Develop Additional Preliminary Project Plans

2.7 Develop Project Budget

2.8 Resolve Inconsistencies in Project Plan

2.9 Perform Project Plan Quality Review

2.10 Prepare and Present Client Proposal

2.11 Perform Planning and Proposal Quality Review

Activities

3.1 Reach Agreement on Proposal

3.2 Produce Final Proposal and Project Baseline

3.3 Complete Contract

3.4 Perform Selection Quality Review

Activities

4.1 Start Up Project

4.2 Conduct Project Control
- Project Plan Execution
- Schedule Tracking and Control
- Financial Tracking and Control
- Human Resources Mgt.
- Communications Mgt.
- Quality Control
- Risk Management
- Change Control
- Configuration Mgt.
- Contract and Procurement Mgt.

4.3 Implement Solution
- Manage to the Project Plan
  - Project Teams
  - Client Expectations
  - Project Deliverables
- Perform Client Acceptance
- Transfer to Warranty and Support

4.4 Close Project Implementation

4.5 Perform Implementation Quality Review

Activities

5.1 Fulfil Warranty Commitments

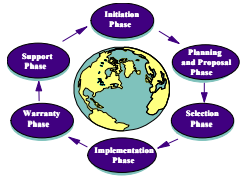
5.2 Perform Warranty Quality Review

Activities

6.1 Initiate Post-Warranty Support Services

6.2 Perform Support Quality Review

Required Inputs
(From Principal Consultants, Solution Consultants)

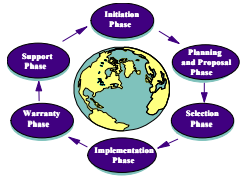


- Local Authorisation Form
- Opportunity Investigation (AO, SBC, etc.)
- Request for Proposal (RFP)
- Invitation to Quote (ITQ)
- Signed Risk Opportunity and Analysis Model (ROAM)

→ **FocusPM Methodology** →

Improved Win Ratio and Repeatable Business

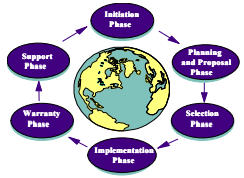
Key Business Points



"IT WILL CHANGE THE WAY WE DO BUSINESS" – Jim Sherriff

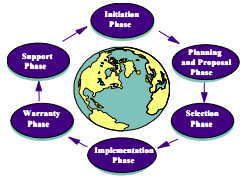
- Following FocusPM is mandatory for PM's
- The Project Plan content is used in the proposal
- Planning components (Design and Project Plan) can be deliverable templates in a consulting project
- HP's service methodologies (from FOI's) are included in the development of the WBS
- The Project Plan is the basis for the contract and becomes th Addendum to the contract – (Not the Proposal)
- New Roles and Responsibilities for PM's and others
- Scalability – all activities and tasks required

Key Business Points
(Continued)



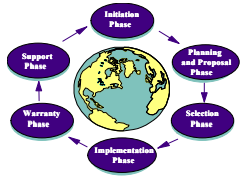
- If required resources are not available, PM escalates the issues and stops the project
  - Rescheduling occurs upon start-up
- Checkpoints in the FocusPM Bid Plan require management approval **before** proceeding
  - Bid Plan – Presales
  - Project Plan – Implementation
    - Proposal – Submission
    - Client negotiated proposal changes
    - Scope changes

The Project Manager is responsible for



- leading the delivery of large integrate solution and for key steps in the sale of solution
- overall project plan, budget, schedule, staffing...
- overall risk management and profitability
- making a recommendation to management (GO/NO GO decision)
- effectively applying the FocusPM Methodology to solution project

During the Project, the Project Manager



- is the single point of contact with client
- is the Business Manager for the project
- is accountable for the agreed-upon margin for the project
- manages all people resources on the project
- is accountable to Senior Manager
- must have all change control requests approved by HP Management and Client
- provides performance feedback on all project team members at major milestones and project close-out --- aligned with HP Consulting Couselee Review Process

FocusPM Methodology Overview

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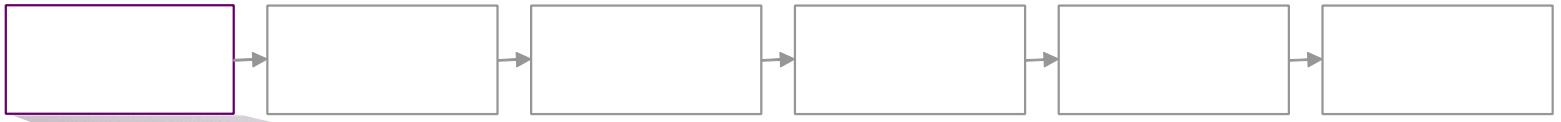
1.0 Initiation Phase - Overview



Key Decision:
- HP's Response to Client

Input

Local Authorisation Form

Opportunity Investigation

Request for Proposal (RFP)

Invitation to Quote (ITQ)

Risk and Opportunity Analysis Model (ROAM)

Activities

1.1 Appoint Project Manager

1.2 Estimate Bid Effort

1.3 Perform Quality Review of Engagement

1.4 Request Authorisation to Bid

Output

Project Manager Appointment

Client Requirements

Project Mission and Objectives

Bid Plan

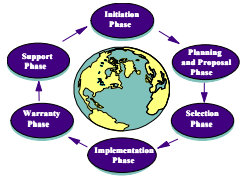
Bid Quality Review

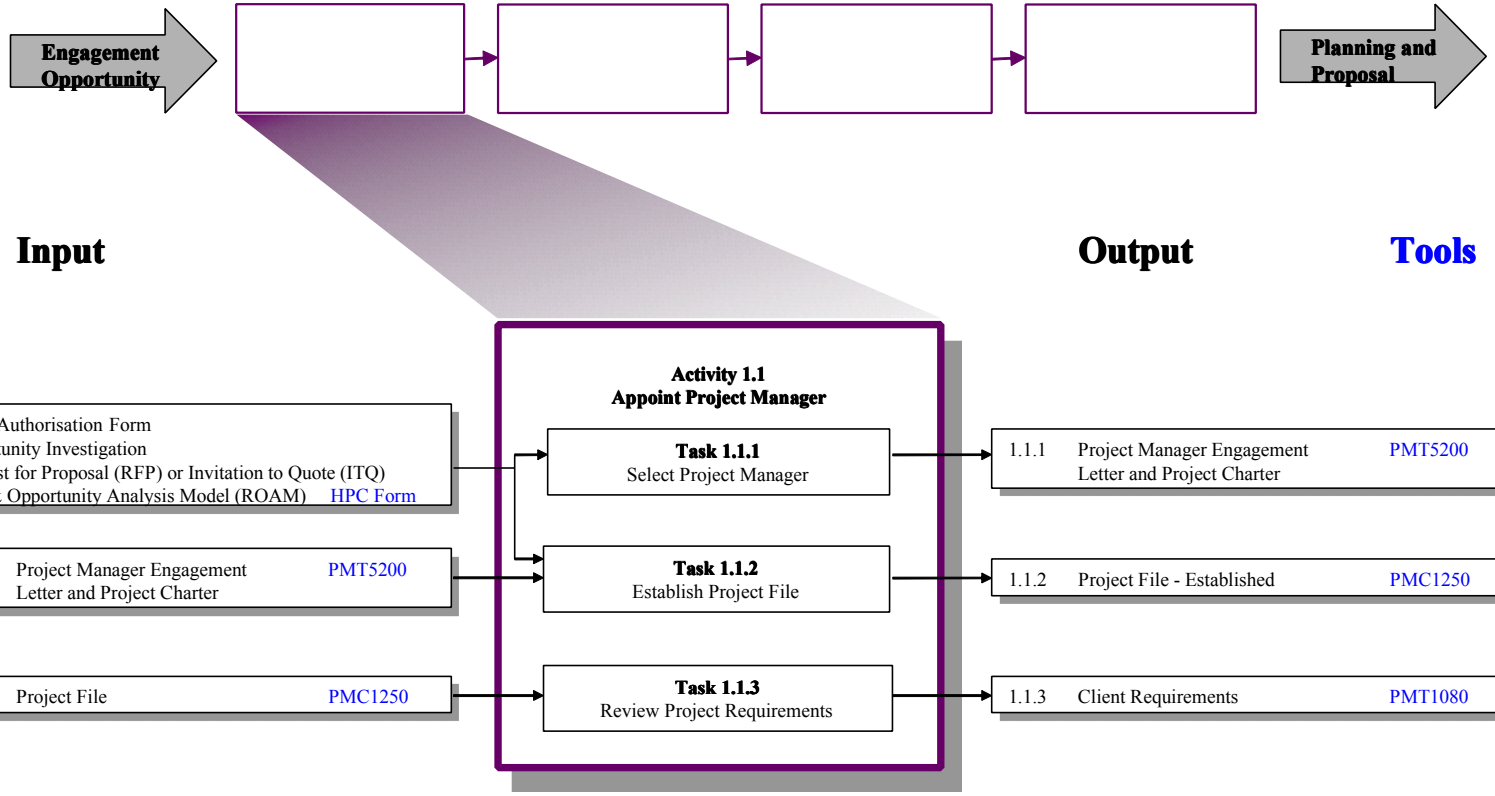
Local Authorisation Form

Key Decision:
- HP's Response to Client

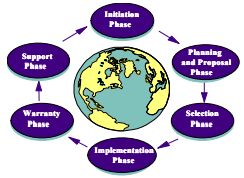
Objective: Manage HP's opportunity cost

1.0 Initiation Phase



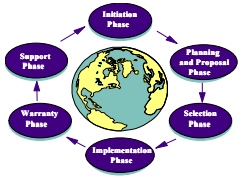


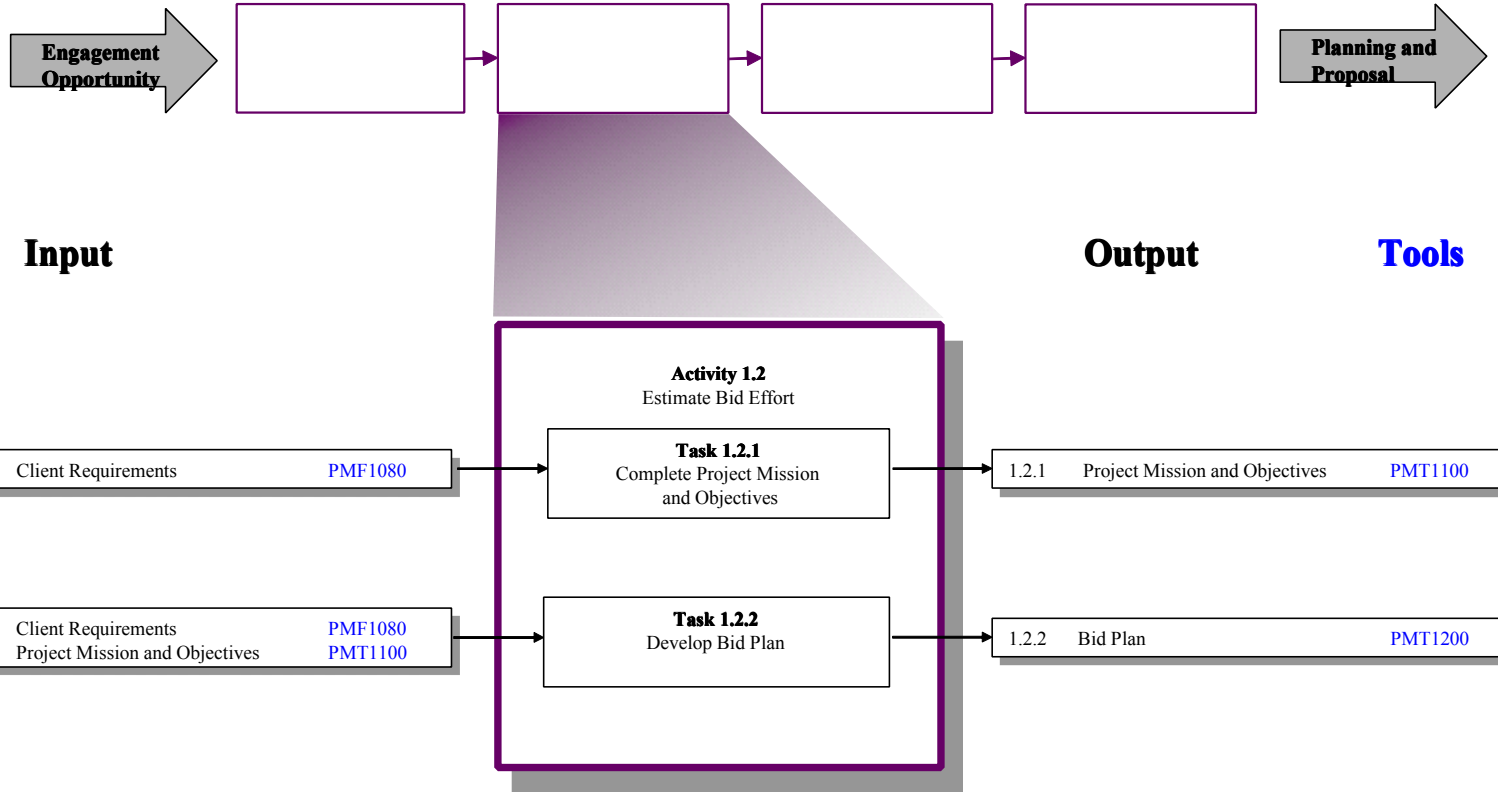
Project File in Initiation Phase



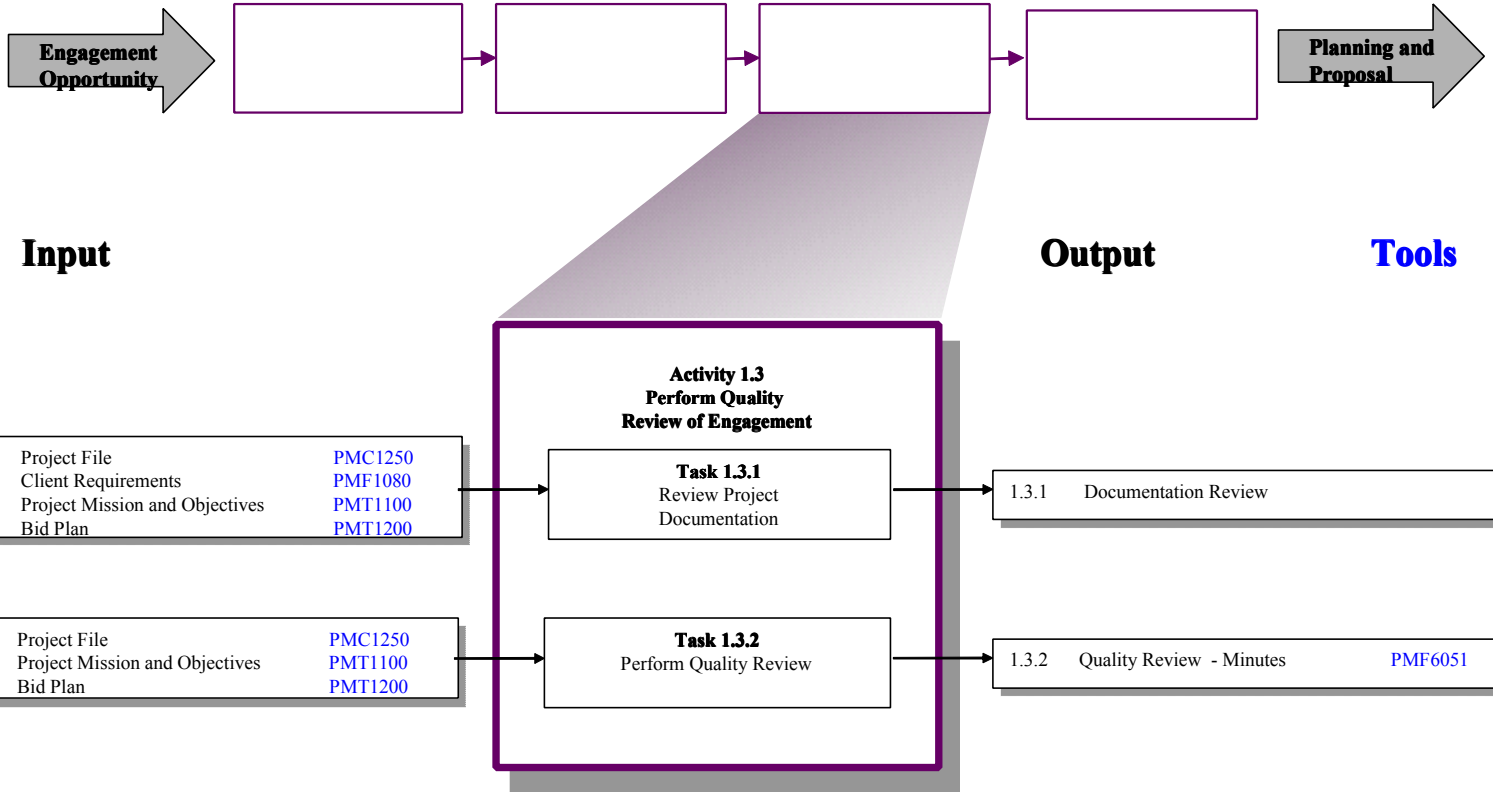
Task ID	Tool ID	Document Name
1.1.1	Local	Request for Proposal or Invitation to Quote
1.1.1	Local	Opportunity Investigation
1.1.1	Local	Solution Business Case (A0, A1, etc.)
1.1.1	HPC Form	Risk and Opportunity Analysis Model
1.1.1	PMT5200	Project Manager Engagement Letter and Project Charter
1.1.3	PMF1080	Client Requirements Log
1.2.1	PMT1100	Project Mission and Objectives
1.2.2	PMT1200	Bid Plan
1.3.2	PMF6051	Quality Review - Minutes
1.4.1	Local	Local Authorisation to Develop Proposal
1.4.2	PMC1250	Project File - Updated
1.4.3	PMF5100	Internal/External Resources (Bid Team)

1.0 Initiation Phase





1.0 Initiation Phase



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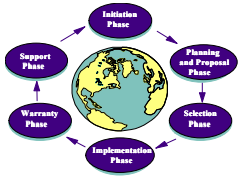
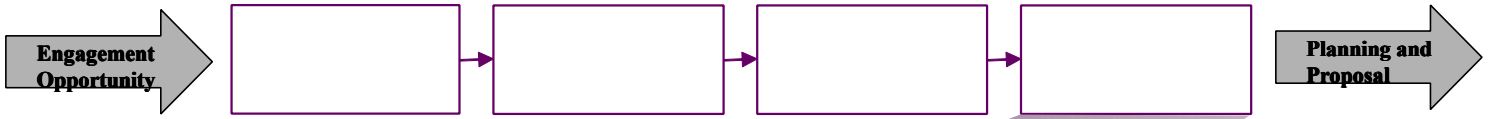




Input

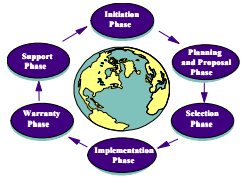
Output

Tools

Activity 1.4
Request Authorization to Bid

Input		Task	Output	
1.2.1 Project Mission and Objectives	PMT1100	**Task 1.4.1** Present Recommendation for Approval	1.4.1 Local Authorisation	
1.2.2 Bid Plan	PMT1200			
1.3.2 Quality Review - Minutes	PMF6051			
1.1.2 Project File	PMC1250	**Task 1.4.2** Update Project File	1.4.2 Project File - Updated	PMC1250
1.4.1 Local Authorisation				
1.2.2 Bid Plan	PMT1200	**Task 1.4.3** Establish Bid Team	1.4.3 Internal/External Resources- Bid Team	PMF5100
1.4.1 Local Authorisation				

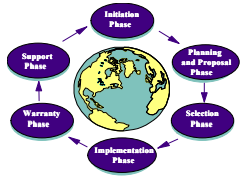
Highlights of Initiation Phase



Project Mission and Objective

- Project Background
- Project Objective (Client)
- Critical Success Factor
- Exclusions
- Key milestones
- Constrain
- HP Objectives

Highlights of Initiation Phase(Continued)



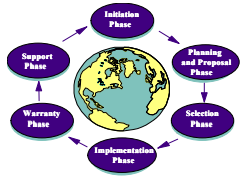
Risk Management begins in the Initiation Phase and continues throughout the other phases:

- Sales team completes Risk and Opportunity Analysis Model (ROAM)
- Stresses value of formalized risk assessment process versus gut feeling
- Stresses control and profitability

Good decision:

- Improved win/loss ratio
- No bad projects!

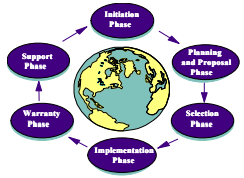
Highlights of Initiation Phase (Continued)



The Project Manager:

- Is assigned early in the process
- Reviews sales information on client and project
- Creates Project Mission and Objectives
- Develops Bid Plan
- Recommends next step
- May have an additional project review with client

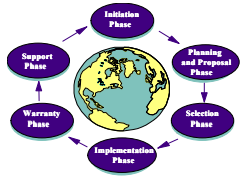
Highlights of Initiation Phase (Continued)



As input to Phase 1, the Sales Team:

- Develops sales vision
- Conducts client evaluation
- Qualifies the Client:
  - Finds assurances that client can afford the solution
  - Determines whether client vision is compatible with HP mission
- Develops initial risk analysis (ROAM)

Success Story: UK HP Consulting

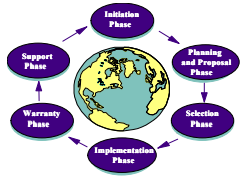


- 1 out of 10 projects progress from Initiation Phase to Planning and Proposal Phase

- 3 out of 4 projects in the Planning and Proposal Phase progress to the Selection Phase

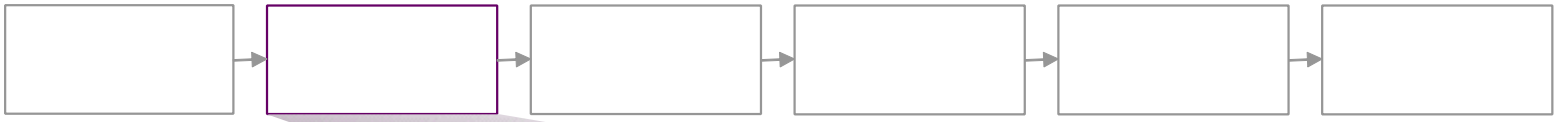
- 4 out of 5 projects in the Selection Phase progress to the Implementation Phase

Overview of Initiation Phase



Key Decisions	H **Selection of Project Manager (1.1.1)** H Bid Recommendation (1.4.1)
Review Points	H Quality Review of Engagement (1.3)

2.0 Planning and Proposal Phase – Overview



Input

Approved Bid Plan
Local Authorisation Form
Client Information
Client Requirements
Project Information
Service Methodologies

Key Decisions:

- Design
- MOC Inclusions
- Risk
- Scope
- Project Plan
- ERP

Activities

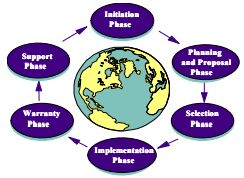
2.1 Prepare Technical Solution
2.2 Develop Project Scope Statement and WBS
2.3 Develop Project Schedule
2.4 Establish Project Resource Requirements
2.5 Develop Project Risk Management Plan
2.6 Develop Additional Preliminary Project Plans
2.7 Develop Project Budget
2.8 Resolve Inconsistencies in Project Plan
2.9 Perform Project Plan Quality Review
2.10 Prepare and Present
2.11 Perform Planning and Proposal Quality Review

Output

Solution Design
Scope of Work
Project Plan (Including Risk Plan, Support Plan, and Warranty Plan)
Project File
Local Pricing Worksheet
Client Proposal
Local Authorisation Form
Project Plan/Proposal Quality Review

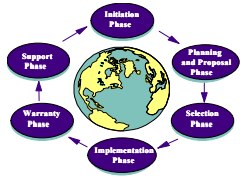
Objective: Design solution, develop project plan, and present a winning proposal

2.1 Prepare Technical Solution



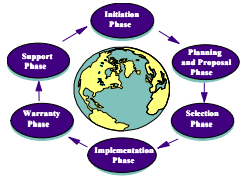
Input		Activity 2.1 Prepare Technical Solution	Output		Tools
1.1.3 Client Requirements	PMF1080				
1.2.1 Project Mission and Objectives	PMT1100				
1.2.2 Bid Plan	PMT1200				
1.2.1 Project Mission and Objectives	PMT1100				
1.2.2 Bid Plan	PMT1200				
2.1.3 Client Requirements	PMF1080				
2.1.2 Client Requirements - Management of Change	PMF1080				
1.2.1 Project Mission and Objectives	PMT1100				
1.2.2 Bid Plan	PMT1200				
2.1.3 Client Requirements	PMF1080				
1.2.1 Project Mission and Objectives	PMT1100				
2.1.3 Client Requirements	PMF1080				
2.1.4 Internal/External Resources - Third Party	PMF5100				
2.1.5 Internal/External Resources - Subcontractor	PMF5100				
2.1.3 Client Requirements	PMF1080				
2.1.4 Internal/External Resources - Third Party	PMF5100				
2.1.5 Internal/External Resources - Subcontractor	PMF5100				
2.1.6 Project Mission and Objectives	PMT1100				
2.1.7 Service Methodologies	PMF1300				
		Task 2.1.1 Review Client Requirements	2.1.1 Client Requirements - Solution Requirements	PMF1080	
		Task 2.1.2 Evaluate Management of Change	2.1.2 Client Requirements - Management of Change	PMF1080	
		Task 2.1.3 Review with Client	2.1.3 Client Requirements - Reviewed	PMF1080	
		Task 2.1.4 Select Third-Party Products and Services	2.1.4 Internal/External Resources - Third Party	PMF5100	
		Task 2.1.5 Select Subcontractor	2.1.5 Internal/External Resources - Subcontractor 2.1.5 Subcontractor Qualification	PMF5100 PMT5600	
		Task 2.1.6 Update Project Mission and Objectives	2.1.6 Project Mission and Objectives	PMT1100	
		Task 2.1.7 Determine Service Methodologies and Knowledge for Reuse	2.1.7 Service Methodologies	PMF1300	
		Task 2.1.8 Design Client Solution	2.1.8 Solution Design	PMT1350	

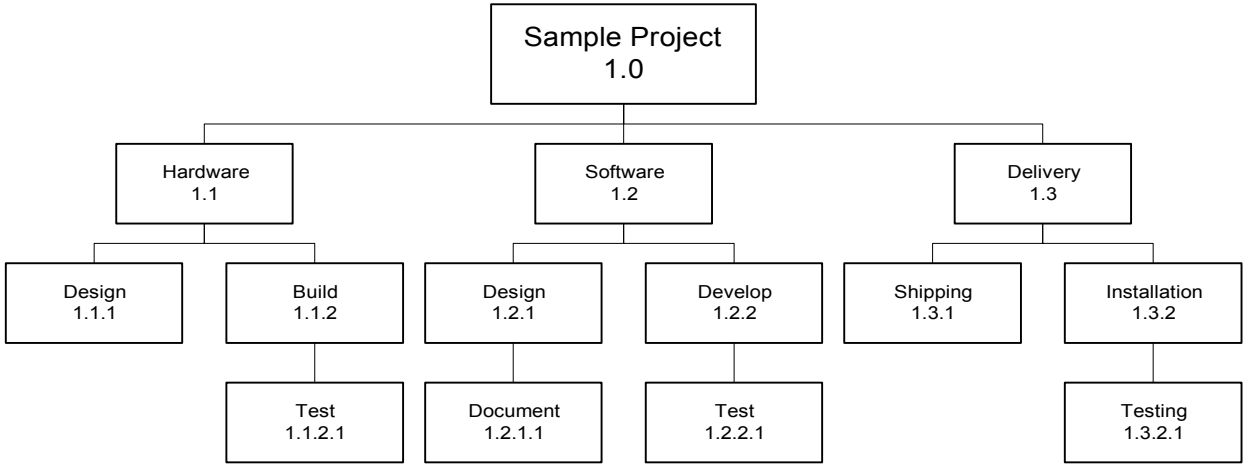
2.2 Develop Project Scope Statement and WBS



- Concise definition of the project objectives
- Overview of the end product, service, or system deliverables
- Detailed description of the size, type, quantity and other pertinent characteristics of deliverable components
- Solution Design overview
- Project Milestones
- Definition of HP and client responsibilities
- Warranty and support requirements
- Project exclusions
- Description of scope change process

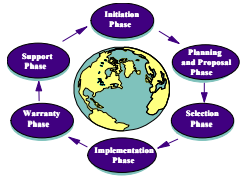
2.2.4 Develop Work Breakdown Structure



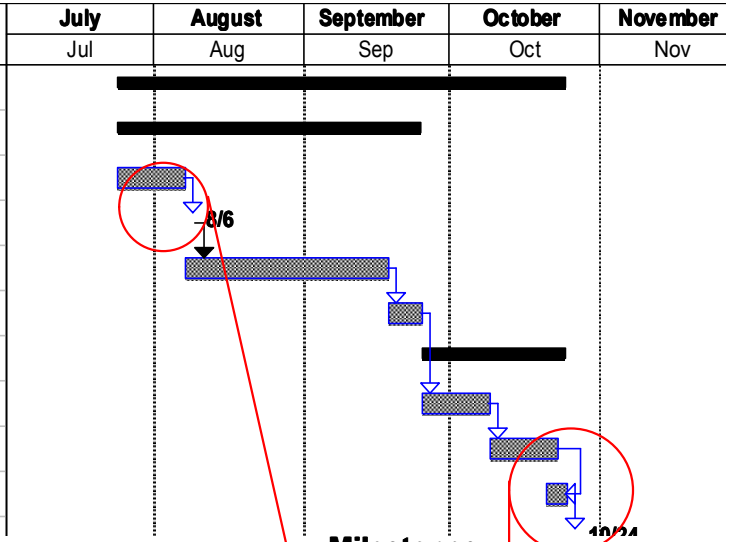


- Clearly defined in terms of quality
- Aligned with one resource or resource group
- Estimated and tracked cost and timeline

2.3 Develop Project Schedule



ID	Task Name	Duration	Start	Finish	Predecessors	Resources
1	**Sample Project**	**67d**	**7/24/97**	**10/24/97**		
2	**Develop**	**45d**	**7/24/97**	**9/24/97**		
3	Design	10d	7/24/97	8/6/97		Bob,Mary,John
4	Approved	0d	8/6/97	8/6/97	3	Bob
5	Build	30d	8/7/97	9/17/97	4	Mary,John
6	Test	5d	9/18/97	9/24/97	5	John
7	**Deliver**	**22d**	**9/25/97**	**10/24/97**		
8	Ship	10d	9/25/97	10/8/97	6	Kathy
9	Install	10d	10/9/97	10/22/97	8	Larry
10	Test	4d	10/21/97	10/24/97	9FF+2d	Mary
11	Accepted	0d	10/24/97	10/24/97	10	Customer



Effort/Duration

Effort and Duration estimates consist of the time available to complete the task and the resources required to complete the task within the available time frame.

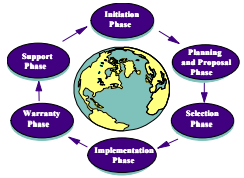
Task Dependencies

Task dependencies establish the relationship between tasks. They can include SF-Start to Finish, SS-Start to Start, FF-Finish to Finish and FS-Finish to Start. Lead and Lag relationships are common .

Milestones

Milestones represent significant events in the project life cycle.

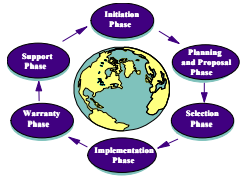
2.4 Establish Project Resource Requirement



The resource plan contains:

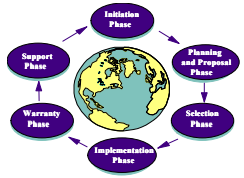
- Resource Summary
- Organizational Structure
- Human Resource Plan
- Performance management Practices
- Transfer to Warranty Provisions
- Mobilization Plan
- Reference

2.5 Develop Project Risk Management Plan



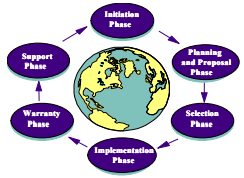
- Identify Project Risk
  - Technical Challenges
  - Legal Issues
  - Project Schedule
  - Regulatory Issue
  - Project Budget
  - Market Action
- Risk Assessment Summary

2.6 Develop Additional Preliminary Project Plan



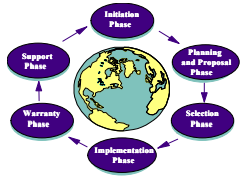
- Quality Plan
- Delivery Plan
- Acceptance Plan
  - Testing plan
  - Acceptance Criteria and Procedures
- Communication Management Plan
- Warrant and Support Plan

2.7 Develop Project Budget



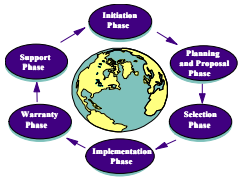
- Develop Human Resource Cost
- Estimate Materiaks and Supplies
- Develop Mobilization Costs
- Incorporste Risk management Costs
- Establish Management Reserve
- Define Client Value
- Establish Solution Price

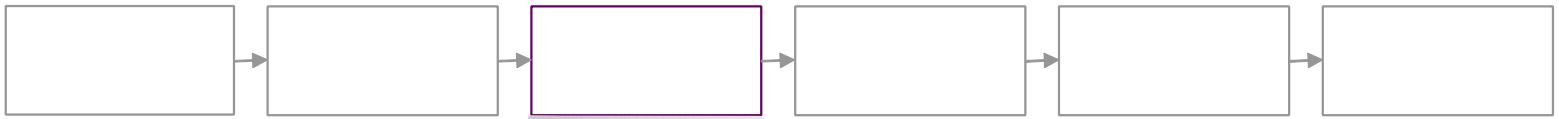
2.9 Perform Quality Review



- Have the client requirements been adequately addresssed in Solution design?
- Has the Project Plan identified all of the work packages and resources required for delivering the solution?
- Does the project organisation provide the necessary level of support and control?
- Is the project time line adequate for the scope of work?
- Have all of the project costs been identified and accurately estimated
- Have all of the project risk factors been identified

3.0 Selection Phase – Overview





Input

Proposal
Project Plan
Risk Management Plan

Activities

3.1 Reach Agreement on Proposal
3.2 Produce Final Proposal and Project Baseline
3.3 Complete Contract
3.4 Perform Selection Quality Review

Output

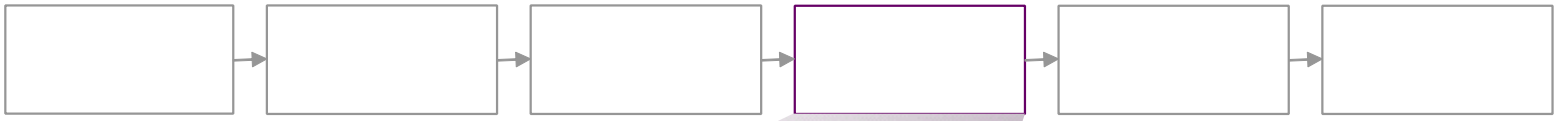
Final Project Plan and Solution Proposal
Project Baseline
Close the Deal (Contract Signed)
Project Snapshot

Key Decisions:

- HP's Response to changes
- Contract T&C's

Objective: Win client business in support of HP's business objectives

4.0 Implementation Phase – Overview



Input

Scope of Work
Project Plan
Client Contract
Project File

Activities

4.1 Start Up Project
4.2 Conduct Program/Project Control
4.3 Implementation Solution
4.4 Close Project Implementation
4.5 Perform Implementation Quality Review

Output

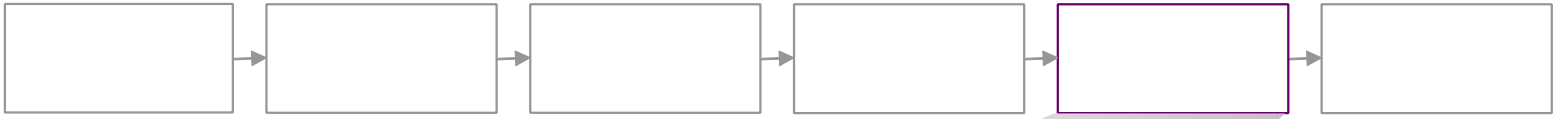
Project Tracking and Control
Implemented Solution
Invoices
Client Acceptance of Solution
Client Evaluation of HP
Project Snapshot

Key Decisions:

- Performance
- Risk
- Acceptance
- Changes

Objective: Deliver project within time, budget, and scope while maximising client satisfaction

5.0 Warranty Phase – Overview



Input

Implemented Solution
Warranty Plan
Project Plan
Contract
Post-Implementation Report

Activities

5.1 Fulfil Warranty Commitments

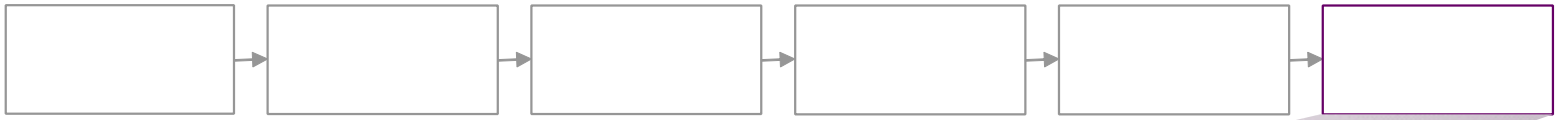
5.2 Perform Warranty Quality Review

Output

Project Closeout
Warranty Services Delivered
Closeout Report
Transition to Appropriate Support

Objective: Provide warranty support to client's satisfaction

6.0 Support Phase – Overview



Input

Support Plan
Client Contract
Post-Implementation Report

Activities

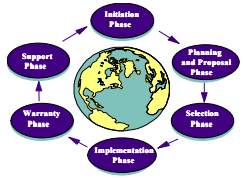
6.1 Initiate Post-Warranty Support Services
6.2 Perform Support Quality Review

Output

Appropriate Documents Transitioned
Support Services Delivered

Objective: Provide contracted support services to client's satisfaction

How does FocusPM Benefit the Project Manager?



Productivity:

- More efficient use of time
- Less chance of burnout
- Doesn't have to "re-invent the wheel" every time

Worldwide Methodology and Best Practices:

- All Project Managers world-wide use the same methodology
- Project team members all familiar with same methodology from day one
- FocusPM is continually updated to include best practices

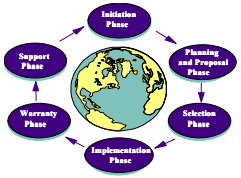
More Successful Projects:

- Risk can be predicted and managed
- Project Manager's recommendation is part of the qualification proce

Team Satisfaction:

- Framework for team integration
- Structured Project Office environment

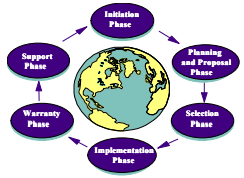
How does FocusPM Benefit the Client Business Manager, Principal Consultant and Account Representative?



- Enables **Teaming** during selling process
- Encourages **joint decision making**
- Single point of contact throughout engagement
- Reduced start-up time
- Reduced cost of sales = higher profit! – Improves **win ratio** with rigorous Go / No Go decisions
- Increased client satisfaction – **repeat business**
- **Increased planning** in presales – leads to **successful delivery**

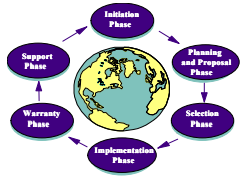
"***A colleague you can rely on***"
Project Managers will take responsibility

How does FocusPM Benefit our Clients?



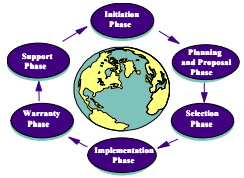
- Single point of contact throughout project life cycle
- Clear project plan, SOW and deliverables
- Quality delivery of solutions
- On-time delivery of solutions
- Control of cost and schedule by using a disciplined, formal process
- Risk is managed by partnering with HP - risks can be shared by HP and the client
- Defined process to manage change
- HP can work in a more structured manner and appear more professional to the client
- Proven methodology and Project Management capability world-wide

How Does FocusPM Benefit HP?



- More efficiency in supporting one methodology world-wide used by HPC, OSD and SWEO
- Increased productivity of Project Managers
- Improved teamwork
- Framework for knowledge capture and sharing
- Risk Management and control
- Cutting losses from projects -- leading to increased profitabilit
- Improved client and HP satisfaction
- Clients become repeat clients

Why choose HP?



HP's global commitment and knowledge / experience

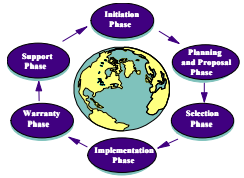
Partnership at all levels between client and HP

"Best in Class" Empowered Project Managers

Structured approach to project planning and implementation

Agreed upon achievable milestones and quality deliverables

"Best in Class" Project Managers



HP Recruitment and Development

Recruit the best from outside

Structured WW training and mentoring program

Business oriented with technical knowledge

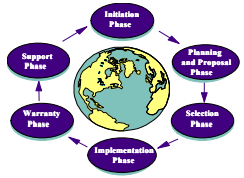
Client focus

Project Manager

Empowered to make decisions on any aspect of the project

Experienced communicators and people managers

HP Project Management Process



FocusPM Methodology → Includes:

- World-wide methodology Entire planning and delivery process
- Process and tools
- Web based
- Meets PMI standard
- Capture and sharing of intellectual capital
- Auditing by peers

- Goals and objectives
  - Scope definition
- Client requirements based on rigorous needs assessment
- Communication strategy
- Risk management
- Scheduling and tracking

Partnering with HP

Joint Executive Sponsorship

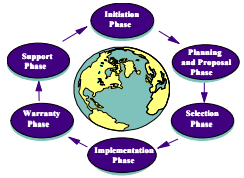
Co-ownership of Process and Outcomes

Joint Decision Making

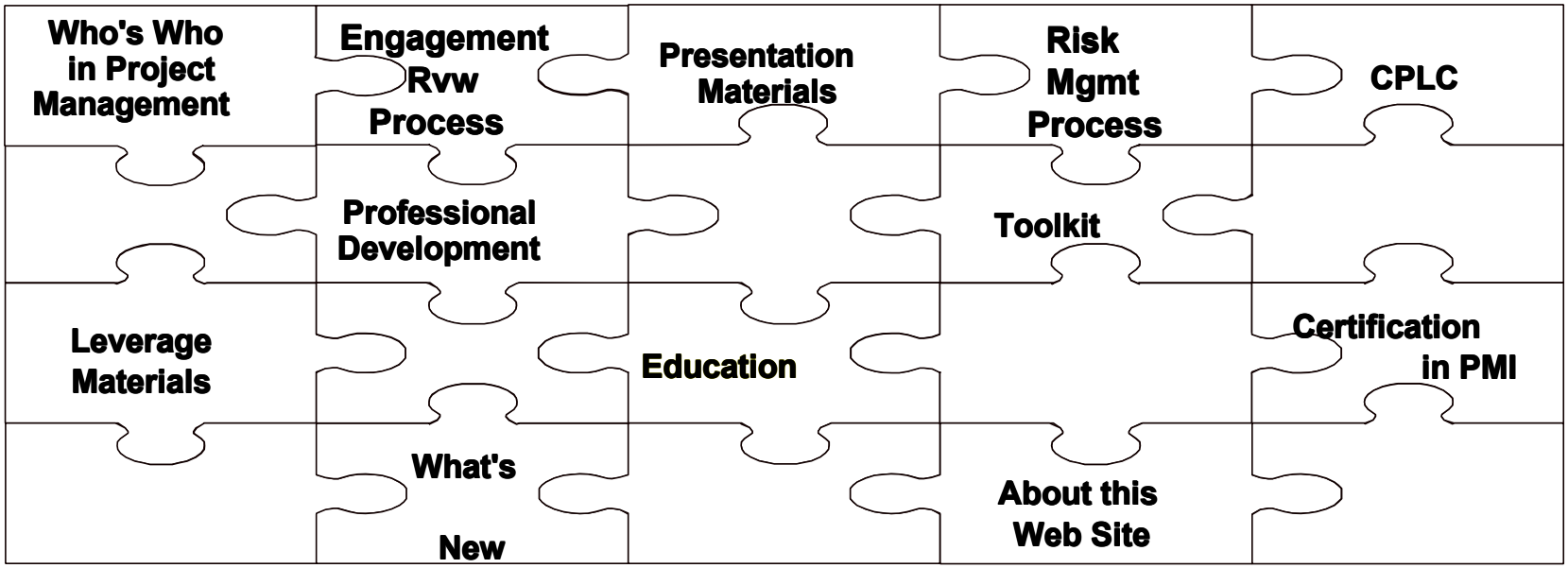
Project Office

Shared Responsibility for Risk

Welcome to HP Consulting



H Project Management Homepage



Your suggestions are welcome. Please send them to Bob Schuetz.

http://americas.pso.hp.com/pm