Get the Work Done!
Tackling Project Management to Improve the Bottom Line

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Resources from Full Sail Partners:

Resources

- **How-To Video – Applying Hotfixes in Deltek Vision:**
  http://bit.ly/11FAm5E

- **Deltek Vision AE Clarity Report: http://bit.ly/T5SqBI**

- **Benefits of an ERP System: http://bit.ly/12qd6Eg**

Articles

- **How-To: Proper Work Breakdown Structure: http://bit.ly/17gROyn**

- **4 Ways to Improve Employee Utilization: http://bit.ly/11L5Sf8**

- **The Basic Project Management Concepts: http://bit.ly/147WQMt**

- **Resource Forecasting: http://bit.ly/12nJYgQ**

Objectives

- **Follow a simple 4 step process for managing projects in order to:**

    - Increase the success of your projects

    - More effectively communicate to and engage stakeholders

    - Motivate and engage project team members

    - Effectively manage project changes

PROJECT SUCCESS

Project Management Phases

DEFINE → PLAN → IMPLEMENT → CLOSE and EVALUATE
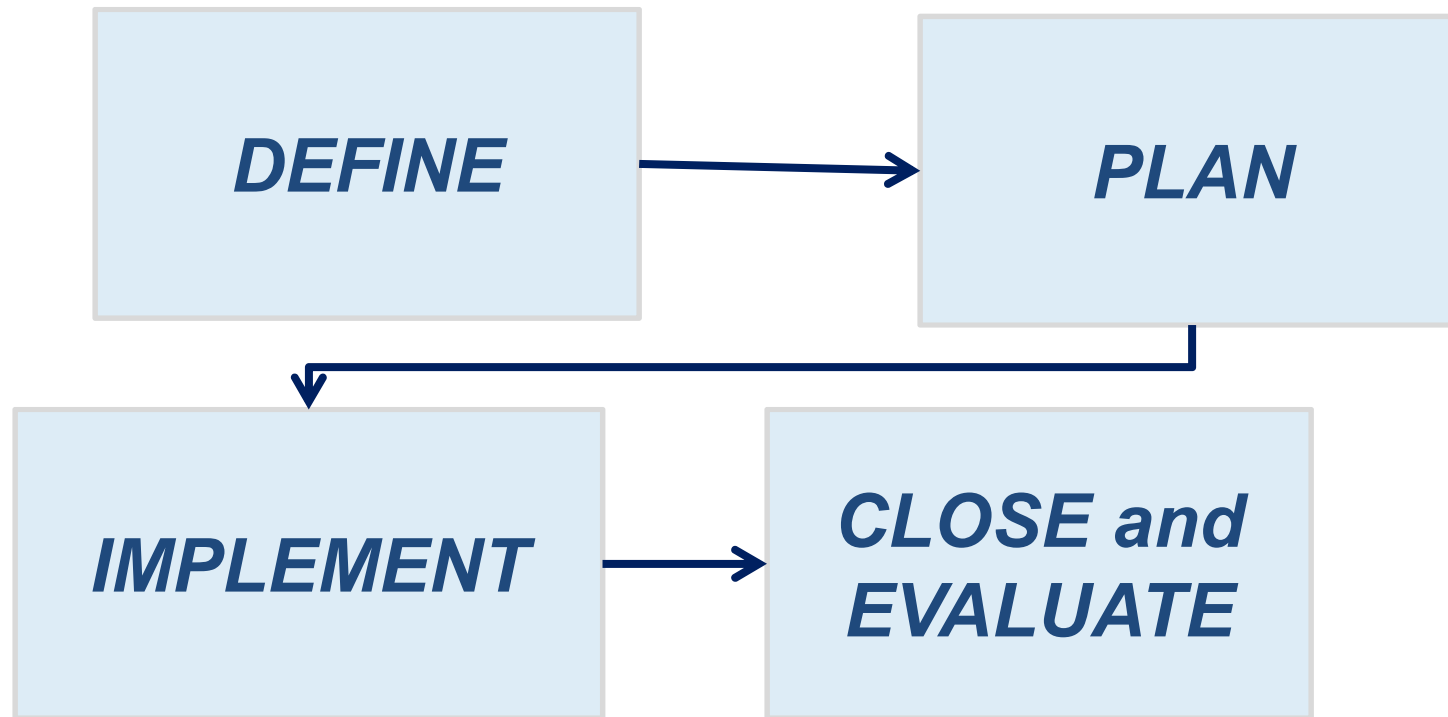
Phase 1: Define

- **Define: The business need for the project is defined**

- **Tasks/deliverables in the Define phase:**
  - Authorization for the project (project charter)
  - Initial conversations with key stakeholders
  - Development of the scope statement
  - Resource needs considered
  - Initial timeline and budget for project shared by sponsor

> *Significant time spent in this early phase enables for increased success on the project.*
>
> *Engage your stakeholders early on in the initiative – begin to establish relationships and get the support you need.*

Best Practice

Phase 2: Plan

- **Plan: Project is well-defined and a plan is developed**

- **Tasks/deliverables in the Plan phase:**
  - Finalized scope statement
  - List of activities or tasks – prioritized along with dependencies (project schedule with major milestones)
  - Project budget finalized
  - List of potential risks with a plan to address
  - Finalized project team roles and responsibilities
  - Communication requirements and plan
  - Status reporting requirements and plan
  - Change management plan

- **And…continue to engage stakeholders**

Phase 3: Implement

- **Implement: Executing, monitoring and controlling the project**

- **Tasks/Deliverables in the Implement phase:**
  - Management of project to budget and schedule
  - Lead team meetings
  - Regular status reports and communications
  - Track project against risk plan
  - Manage changes to the project

Check in regularly with the team outside of project team meetings – but empower them to take the lead on getting their work done! Continue to engage stakeholders.

Best Practice

Phase 4: Close and Evaluate

- **Close and Evaluate: Project ends and moves to operations/process**

- **Tasks/deliverables in the Close and Evaluate phase:**

  - Officially close out project – transition to Operations

  - Pay all invoices, close out all contracts

  - Hold a Lessons Learned meeting

  - Provide stakeholders with a final project report

  - Celebrate with the team!

> *Ask the team and stakeholders 3 questions:*
>
> *1. What went well?*
> *2. What could be done better?*
> *3. What else should we share?*

Best Practice

Summary and Questions

Following a simple process for managing projects enables for greater project success and management of day-to-day activities with project responsibilities.

How will you apply these skills?

Utilizing Technology in Your Project Management Process

- What's your return on investment in your Project Management system?

- Project Management is not an all-or-nothing proposition.

- Find your firm on the Project Management Continuum:

Project Management Progression

Back Office Only: 0%   Spent Vs. Fee: 20%   Budget Vs. Actual: 50%   Some Scheduling: 70%   Full ERP: 100%

Best Practice Project Management Process Tools

1. **Defining your Deliverables** – Project Work Breakdown Structure and Project Setup

2. **Project Review** – From Back office to at least checking the "Actuals" against your Contract Fees

Best Practice Project Management Process Tools

3. **Vision Navigator**

   - Define Timelines for Deliverables

   - Finalize the Budget

   - Assign Resources

   - Communicate with Team via Deltek Kona

   - Maintain Schedule and monitor Progress

     › Estimate to Complete (ETC)

     › Estimate at Completion (EAC)

4. **Vision Resource Planning – the Full ERP**

   - Resource Utilization

   - Aggregate Reporting

Presentation Resources:

Resources

- **Deltek Vision Navigator:**

  - Info Page: http://bit.ly/10PUVcG

- **Deltek Kona:**

  - Blog - What is Kona?: http://bit.ly/VPw2vi

  - Kona Website: http://bit.ly/d5n1xa

- **Client Feedback Tool:**

  - What is the Client Feedback Tool?: http://bit.ly/UG0rAp

  - Blog – 6 Simple Keys to Project Success: http://bit.ly/14xBEyk

Questions?

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Thank you for attending!

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helps us provide you better information and service.

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