

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/T5SqBl>
- 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

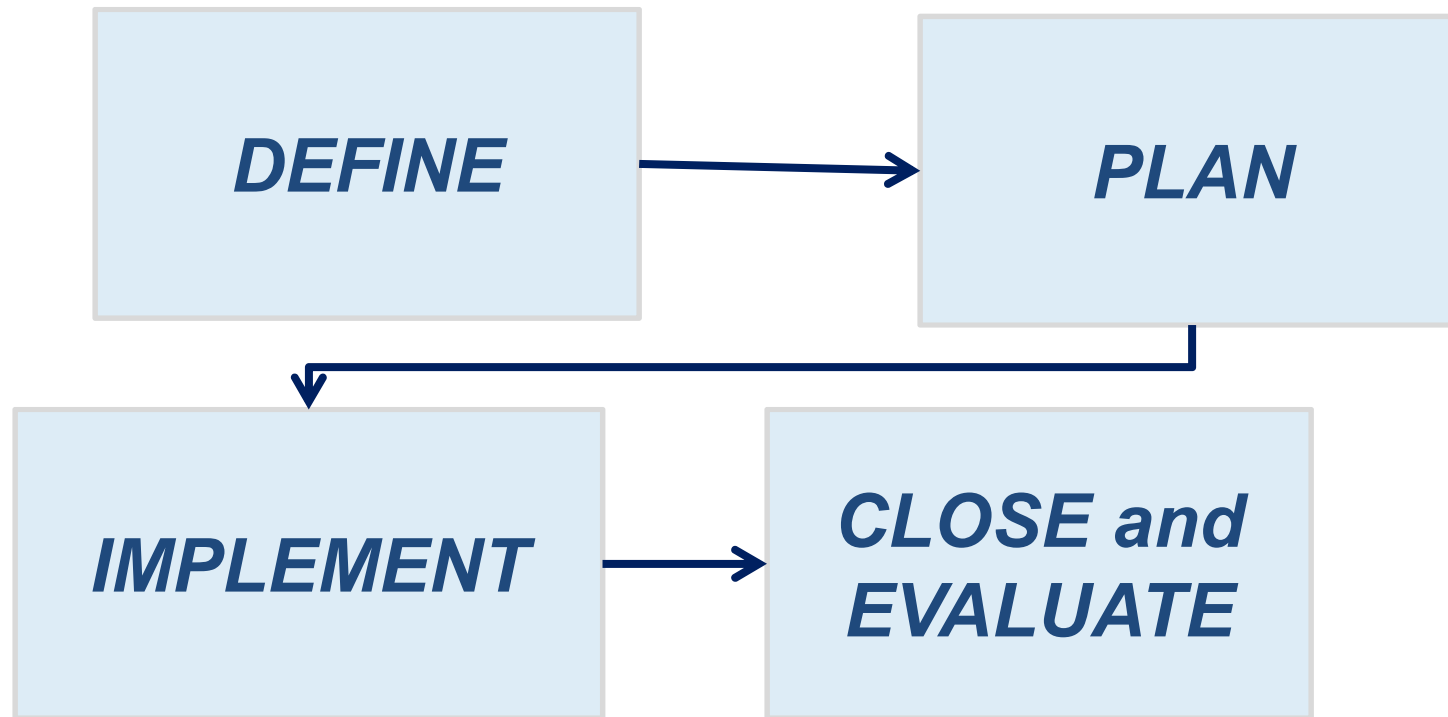
- Follow a simple 4 step process for managing projects in order to:
 - Increase the success of your projects
 - More effectively communicate to and engage stakeholders
 - Motivate and engage project team members
 - Effectively manage project changes

PROJECT SUCCESS



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Project Management Phases



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



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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.



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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?*



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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?



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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



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

The screenshot displays the 'Project Review' window for project '106322-01 - Benson Research Lab'. The interface includes tabs for 'General', 'Accounts Receivable', 'Purchasing', and 'Inventory'. The 'General' tab is active, showing fields for 'Principal-In-Charge' (Hicks, Lance), 'Project Manager' (Washington, Isaac), 'Supervisor' (Hicks, Lance), 'Compensation' (1,025,000.00), and 'Consultant Fee' (50,000.00). The 'Budget Source' is set to 'Budget Worksheet' and the 'Currency' is 'USD'. The 'Cost Analysis' section contains two tables: 'Budget' and 'Actual'. The 'Budget' table lists various cost categories with their respective budgeted amounts, while the 'Actual' table shows the actual costs incurred. The 'Bill Analysis' section also contains two tables: 'Budget' and 'Actual', showing the budgeted and actual bill amounts. The 'Total Hours' are listed as 4,830.00.

	Budget	Actual
Comp + Consult Fee/JTD Revenue	1,075,000.00	245,258.25
Labor	260,500.00	139,961.49
Overhead	390,750.00	16,939.68
Direct Consultant	225,000.00	
Other Direct Expenses		
Profit/Variance Amount	198,750.00	66,603.81
Profit/Variance Percent	18.49	27.16
Reimb Allowance	12,000.00	
Reimb Consultants	167,000.00	19,828.27
Other Reimbursable	2,000.00	1,925.00
Total Hours	4,830.00	4,006.75

	Budget	Actual
	1,075,000.00	245,258.25
	687,270.00	402,185.50
	225,000.00	
	162,730.00	-180,563.41
	15.14	-73.62
	62,500.00	21,361.16
	2,000.00	2,275.00



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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