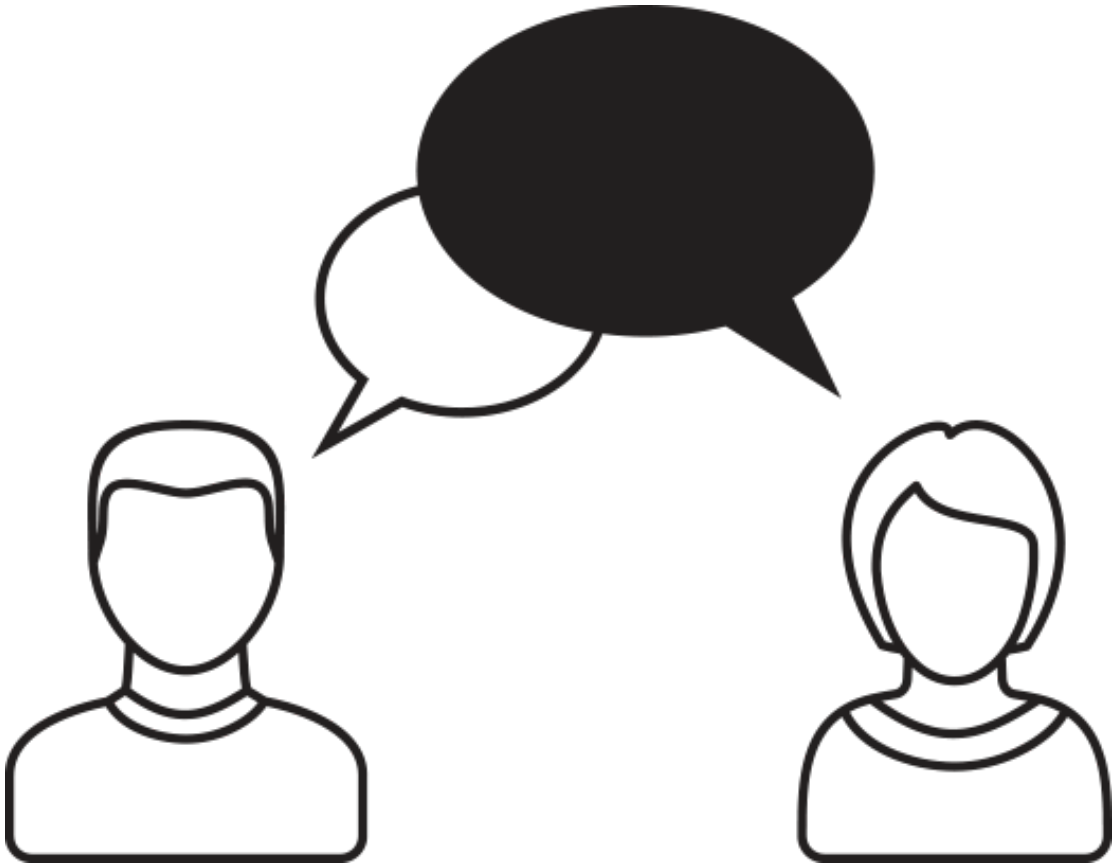
regoUniversity 2017
PPM Processes | Best Practices
Your Guides: Grant Zemont, Mark Feher, Wendy Kraly

Introductions

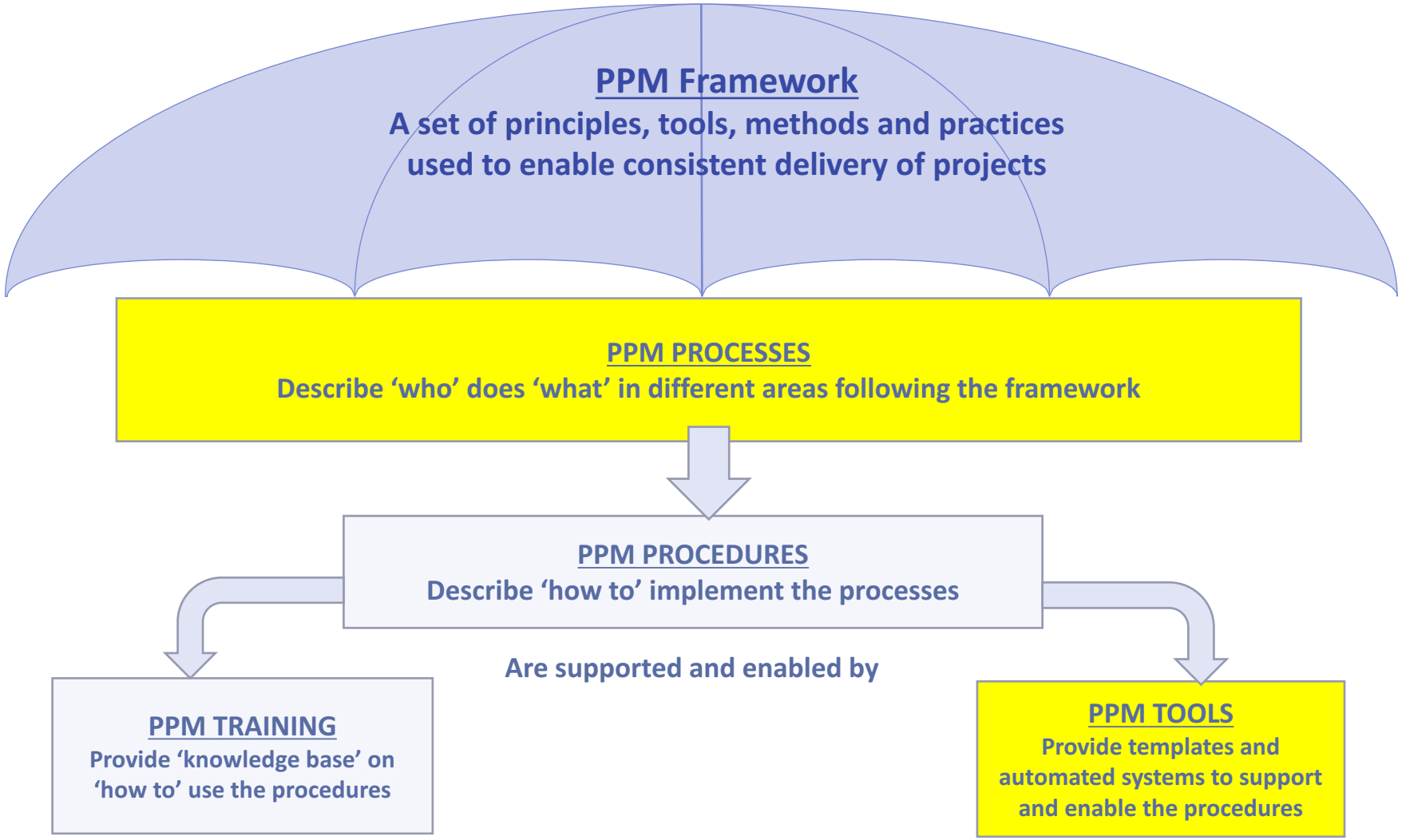
- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Did you implement tool functionality without best practice processes?
- This class will review some of the critical business processes that we recommend organizations put in place before implementing a PPM tool.
- We will provide tips and tricks on defining process frameworks while leveraging tools for successful enablement.

PPM Framework Relationships Map



Quick Poll

- How many of you have experienced purchasing a PPM tool before establishing PPM business processes?

- How many of you have established a formal PPM Framework with **BOTH**:
  - ✓ Standard business processes
  - ✓ PPM Tool to support and enable the processes

The Problem With Tool Before Process

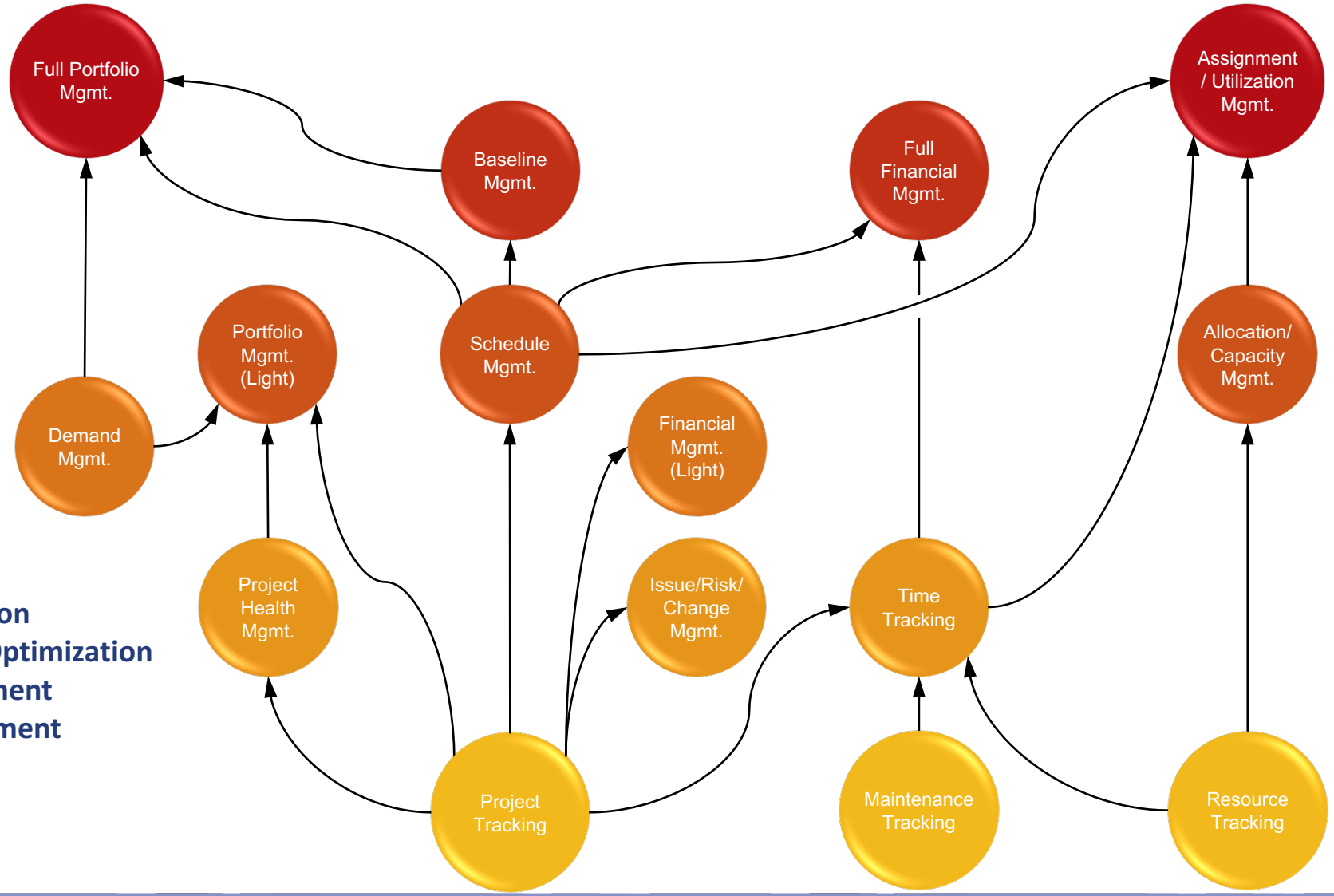
- One of the most common struggles for organizations is to decide whether they should first develop a PPM process framework or implement a PPM tool.

- A investment in PPM can yield significant returns in the way of accurate planning and forecasting, prioritization for decision making, faster project execution, and optimized resource utilization.

Purpose Of A PPM Software

	Visibility to What is Going On	√
	Desire to Control Demand	√
	More Closely Align Investments with Business Priorities	√
	Manage Resources to Do More with the Same – Better Utilization	√
	Drive more Consistency in Delivery	√
	Identify and Mitigate Project Issues Early	√
	Address Data Privacy, Info Security, SOX	√
	Deliver Projects Faster to Market	√
	Kill Bad Projects	√

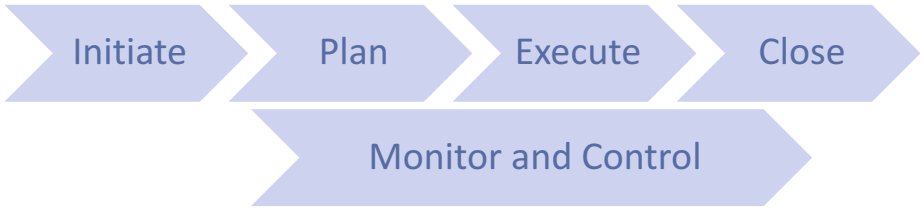
Key PPM Tool Functionality



- **Project Prioritization**
- **Project Portfolio Optimization**
- **Demand Management**
- **Resource Management**
- **Reporting**

Key Project Management Processes

Process Groups



Knowledge Areas

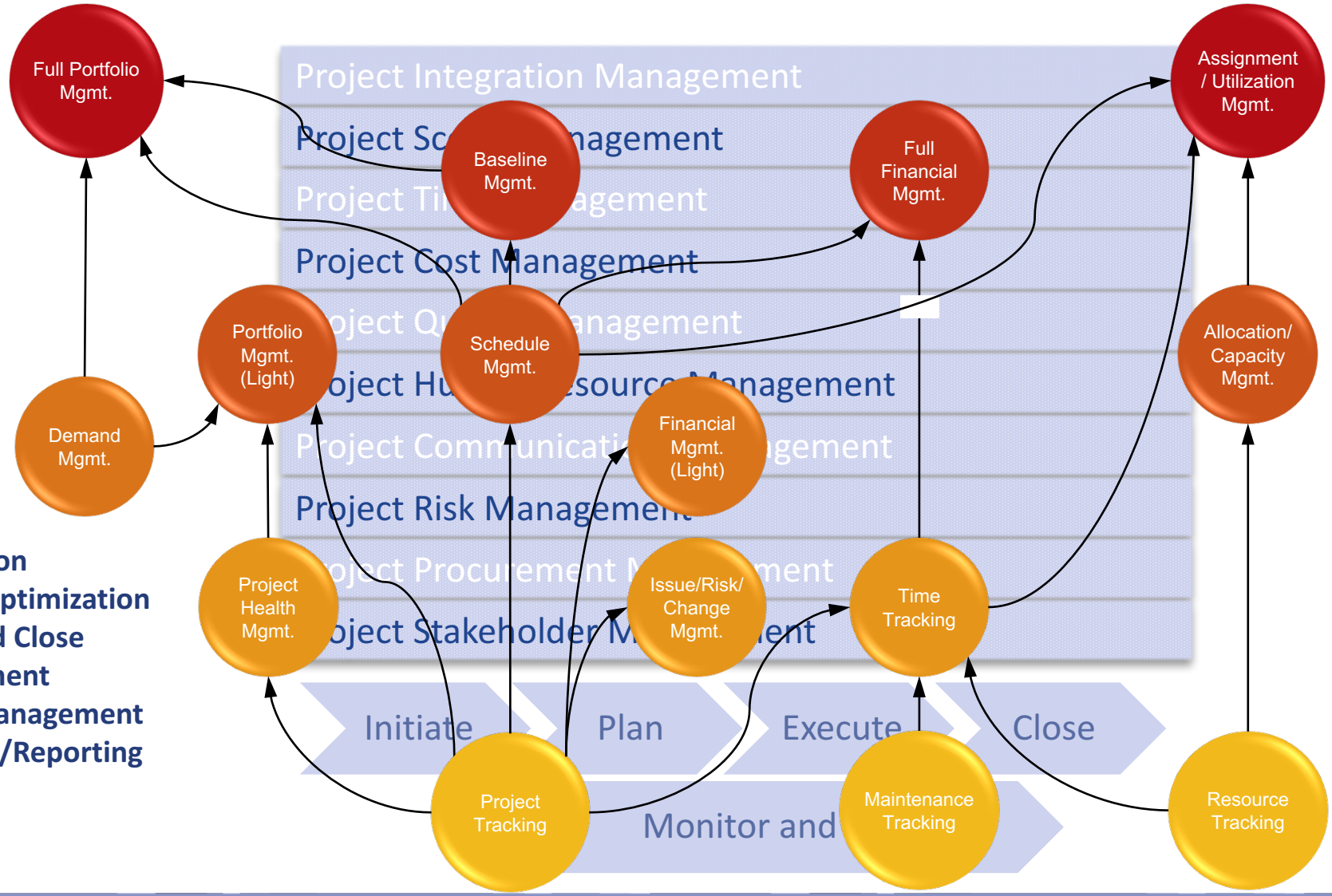
- Project Integration Management
- Project Scope Management
- Project Time Management
- Project Cost Management
- Project Quality Management
- Project Human Resource Management
- Project Communications Management
- Project Risk Management
- Project Procurement Management
- Project Stakeholder Management

- **Initiate**
- **Monitor and Control**
- **Close**
- **Team Management**
- **Risk Management**

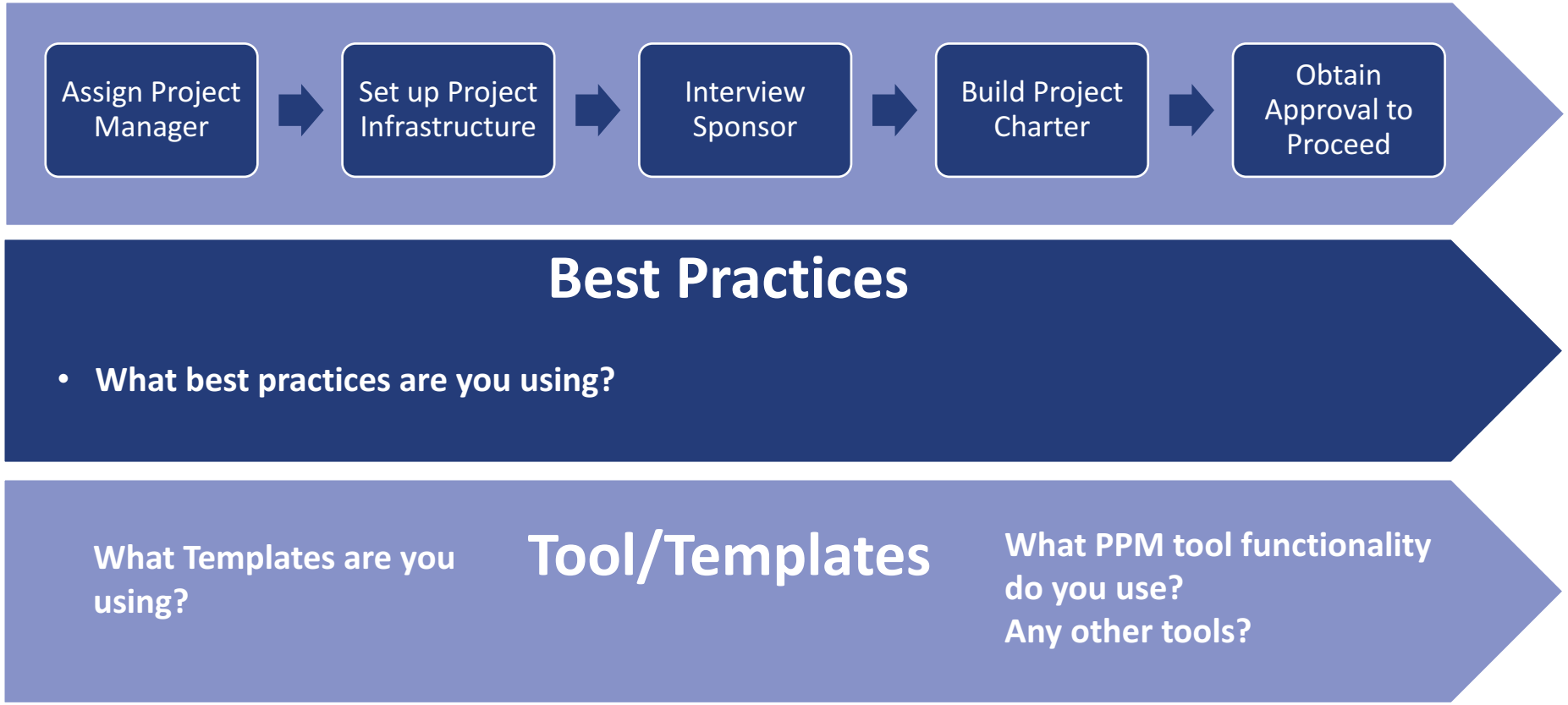
PMBOK® Guide 5th Edition, Project Management Institute

Working Together

- **Project Prioritization**
- **Project Portfolio Optimization**
- **Project Initiate and Close**
- **Demand Management**
- **Team/Resource Management**
- **Monitor & Control/Reporting**
- **Risk Management**



Initiate- Audience Best Practices



Initiate- Rego Best Practices

Best Practices

- **Review Lessons Learned from similar projects**
- **Begin building a relationship and commitment from Sponsor**
- **Align project objectives to company strategic goals**

Project Charter

Tool/Templates

Project SharePoint Site
Properties Tab
Stage Gate Approval

Monitor and Control- Audience Best Practices

Best Practices

- **What Best Practices are you using?**

What templates are you using?

Tool/Templates

What PPM tool functionality do you use?
Any other tools?

Monitor and Control- Rego Best Practices

Best Practices

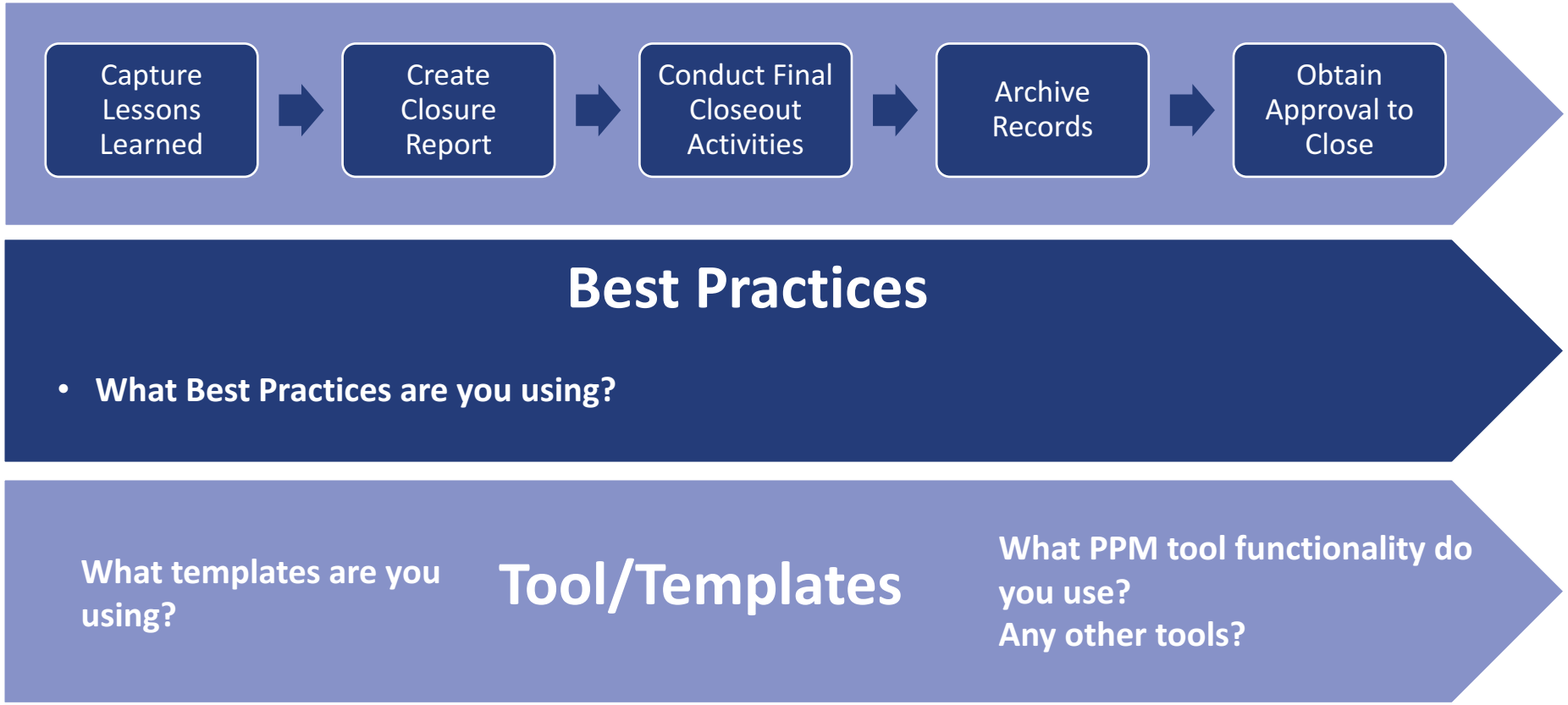
- Control scope, cost, and issues
- Monitor time, risks, and benefits
- Create reports that contain the information needed for effective decision-making

Tool/Templates

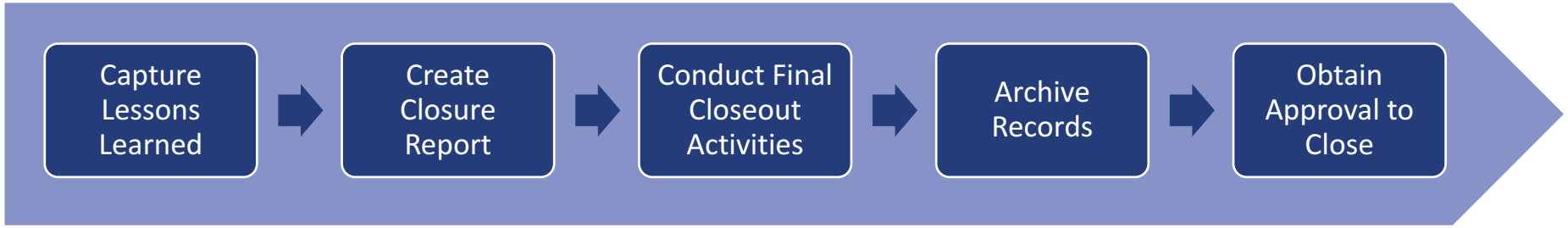
Risk Log
Issues Log
Change Requests
Status Reports
Communications/Meetings

Risks/Issue/Change Tab
Financial Plans/Actuals
Time Tracking
Baselines
Portlets/Dashboards

Close- Audience Best Practices



Close- Rego Best Practices



Best Practices

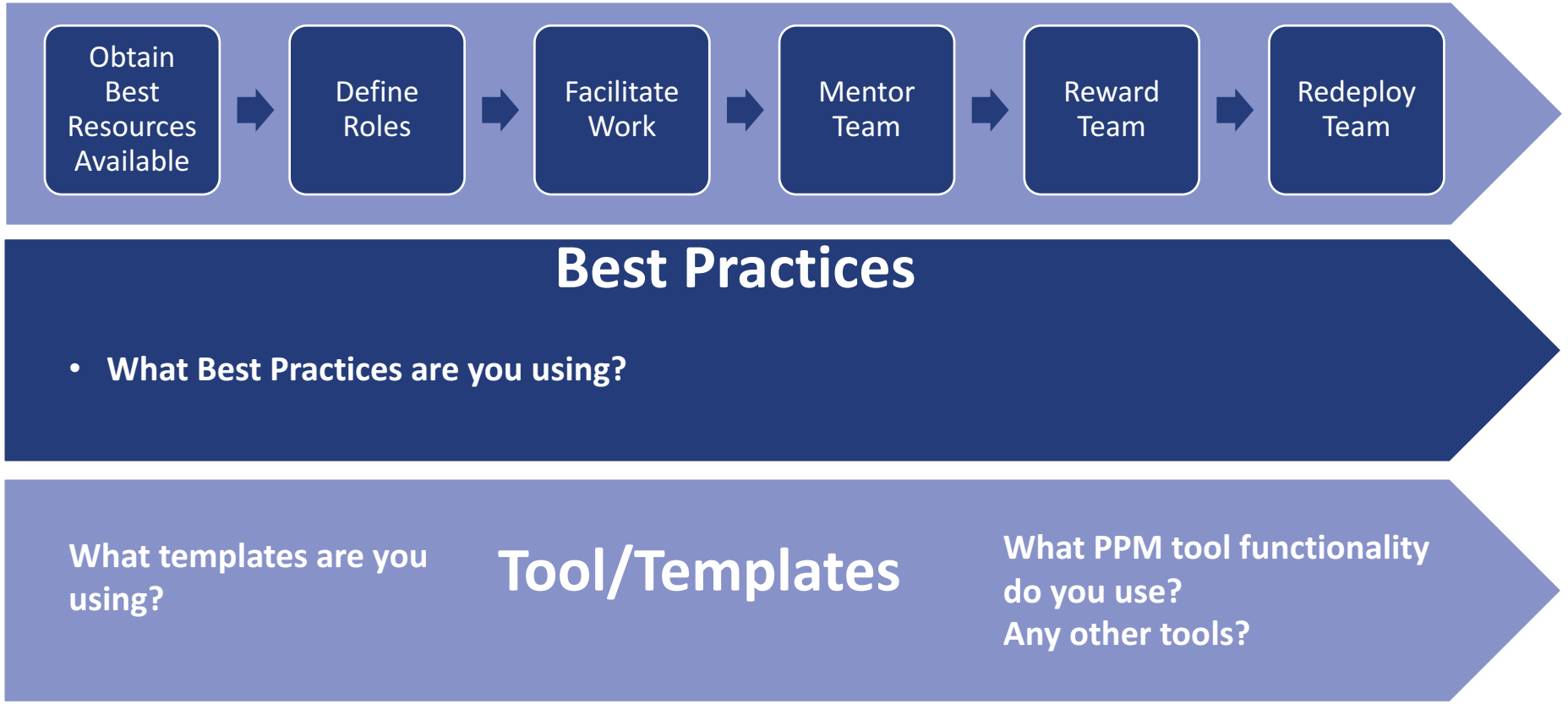
- **Disposition and assign all open change requests, issues and defects**
- **Close down workspaces and archive documents according to Company retention policies**
- **Release project resources and deliver project assets to owners**

Team/Customer Survey
Post-Mortem Meeting
Project Closure Report
Project Closeout Checklist

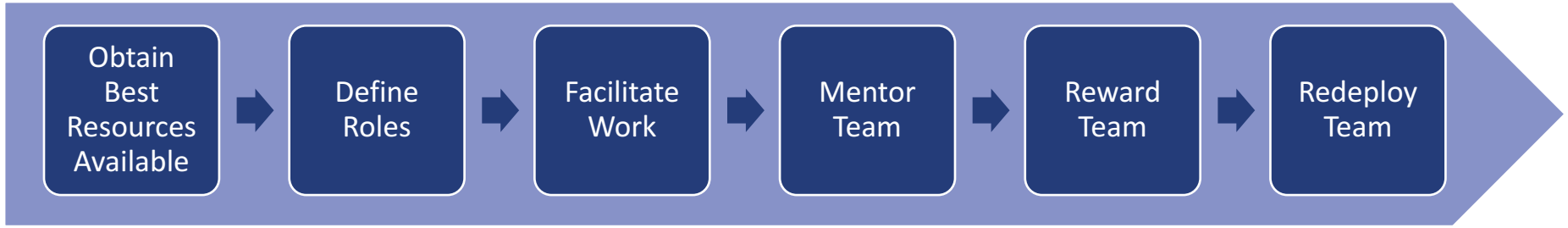
Tool/Templates

Project SharePoint Site
Team Tab
Properties Tab
Tasks Tab

Team Management- Audience Best Practices



Team Management- Rego Best Practices



Best Practices

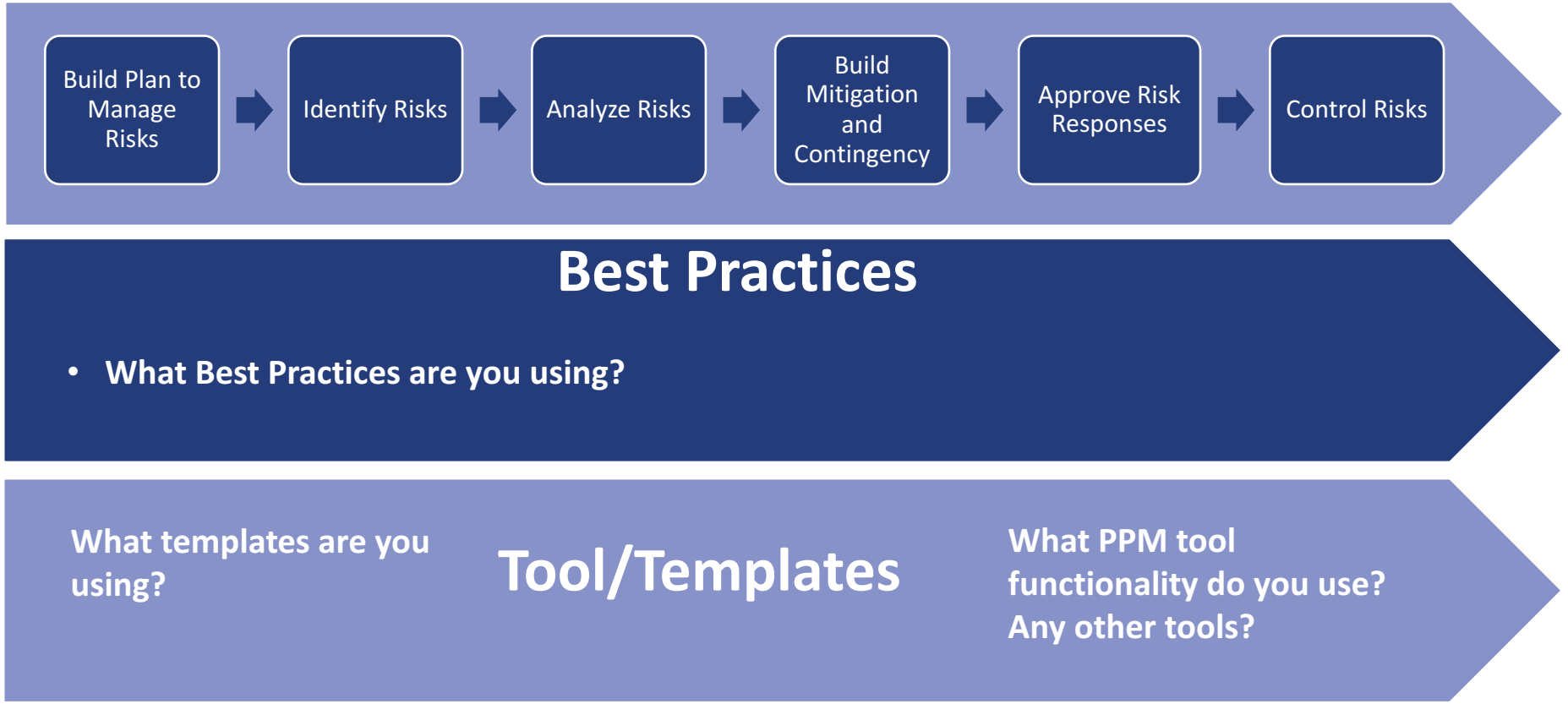
- Negotiate for resources before they are needed
- Provide training/mentoring
- Actively remove roadblocks to work

Tool/Templates

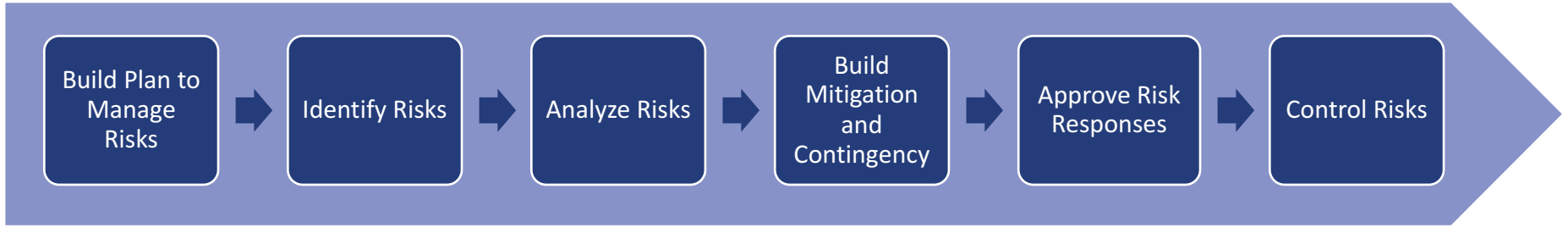
RACI
Training
Team Meetings
Communication Plan

Team Info Tab
Resource
Allocations/Assignments/ETC
Time Tracker

Risk Management- Audience Best Practices



Risk Management- Rego Best Practices



Best Practices

- **Identify risks early and on a regular basis through the life of the project**
- **Develop options and actions to enhance opportunities and reduce threats**
- **Keep all stakeholders informed and tradeoffs required to ensure project success**

Risk Management Plan
Risk Log
Status Reports

Tool/Templates

Risks/Issues/Changes Tab

Remember

- Think about establishing key PPM processes before or at least in conjunction with implementing a PPM tool.

- The PPM tool should support and enable procedures and processes as a part of the overall PPM Framework.

- Key processes to consider when building the PPM framework:
  - ✓ Initiate Phase
  - ✓ Monitor and Control
  - ✓ Close Phase
  - ✓ Team Management
  - ✓ Risk Management

Questions?

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- Enter **Date Completed**
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