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SAN DIEGO

Project Manager | Best Practice "Day in the Life"

Your Guides: Mike Pokorny and Robby Elliott

Introductions

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

Agenda

- Typical PM Activities
- Use Clarity: Get Off of Excel
- Make Information Easier to Access
- Make Flags Easy to Identify
- Simplify & Automate Reporting
- Open Discussion #3
- Work with a Regular Cadence
- Sample Schedule

Open Discussion #1

- How many of you are PMs or are a part of the PMO?
- How many projects do you (or your PMs) typically manage at one time?
- What are the most common Methodologies?
  - Waterfall
  - Agile
  - Iterative

- What are your greatest challenges to successful delivery and collaboration?

Typical PM Activities

Category	Initial Set-Up	Ongoing Monitor & Control	Project Closure
General Project Management	• Create project & populate necessary data.	• Add/monitor/update risks, issues, and change requests • Create status reports (weekly/monthly)	• Set "Open for Time Entry" to no on project • Ensure all risks, issues, and changes are closed or resolved. • Complete final status report
Team Management	• Determine project work needed, estimate staffing needs and request roles or resources.	• Confirm roles filled with named resources. • View variances between planned allocation, ETCs and actual hours. • Modify resource allocations as needed.	• Set resource allocations to reflect project close date. • Set "Open for Time Entry" to no for all resources.
Task Management	• Build project schedule/WBS. • Sequence task/milestones, add dependencies, and link tasks. • Assign resources to tasks and add ETCs. • Run Auto-Schedule to identify critical path. • Set Baseline	• Update project schedule with task status (started/complete) • Monitor for proposed ETCs. Adjust ETCs as needed. • Run Auto-Schedule	• Set task/milestone status to complete. • Zero out ETCs • Close tasks for time entry • Ensure all future dates on tasks/milestones are set no later than project close date
Financial Management	• Create Cost/Budget/Benefit plans	• View project variance between budget and actuals. Introduce change requests as needed.	

Open Discussion

- How much time do you spend managing the data in Clarity?
- What functions seem to be cumbersome?
- Which parts of the tool make things easier?
- How do we make the cumbersome items easier?
- Suggested features to be added/removed?

Use Clarity: Transition Away from Supplemental Tools

- Use Clarity to manage all aspects of your Investments, wherever possible:
  - Issues / Risks / Change Requests
  - Use Action Items
  - Use Milestones / Tasks
  - Use Baselines
  - Use Financial Plans
  - Monitor Team Allocations/Availability

**Excel is offline, often unshared, not real-time and most critically, not centralized. Centralizing any and all of the modules above will reduce complexity and increase accuracy and ease in reporting information to all project stakeholders.*

** Eliminate multiple data entry points, improve data integrity*

** Sharepoint is often "one more place" to go to review project data.*

**If your stakeholder has more than one PM or set of projects, they're going to enjoy not getting emails with spreadsheets.*

Project Management in the New UX

Highlights of the New UX improvements

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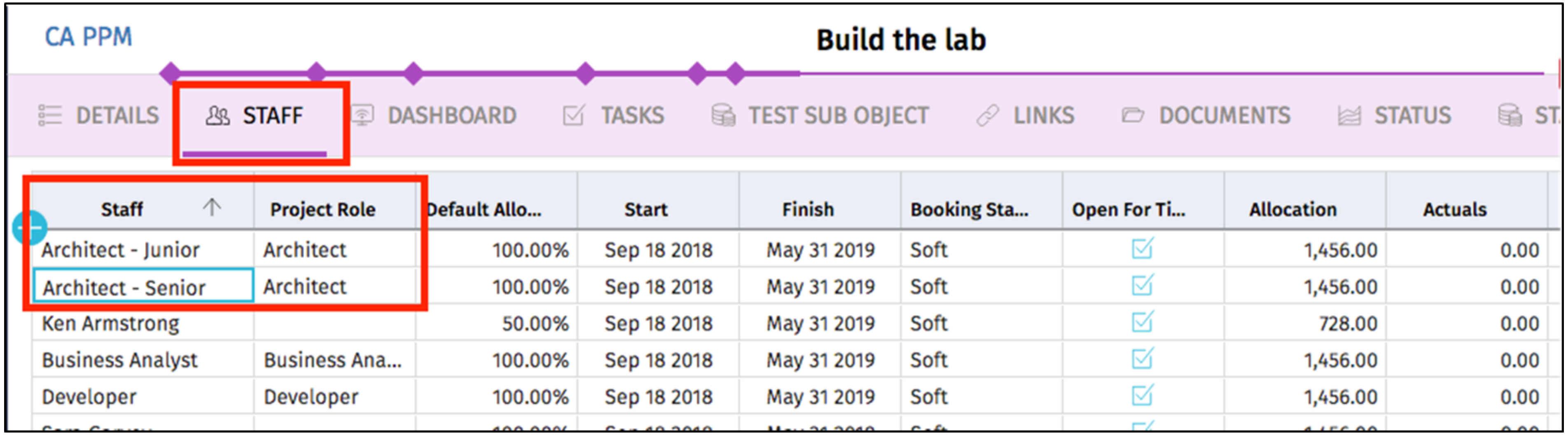
Staffing Improvements

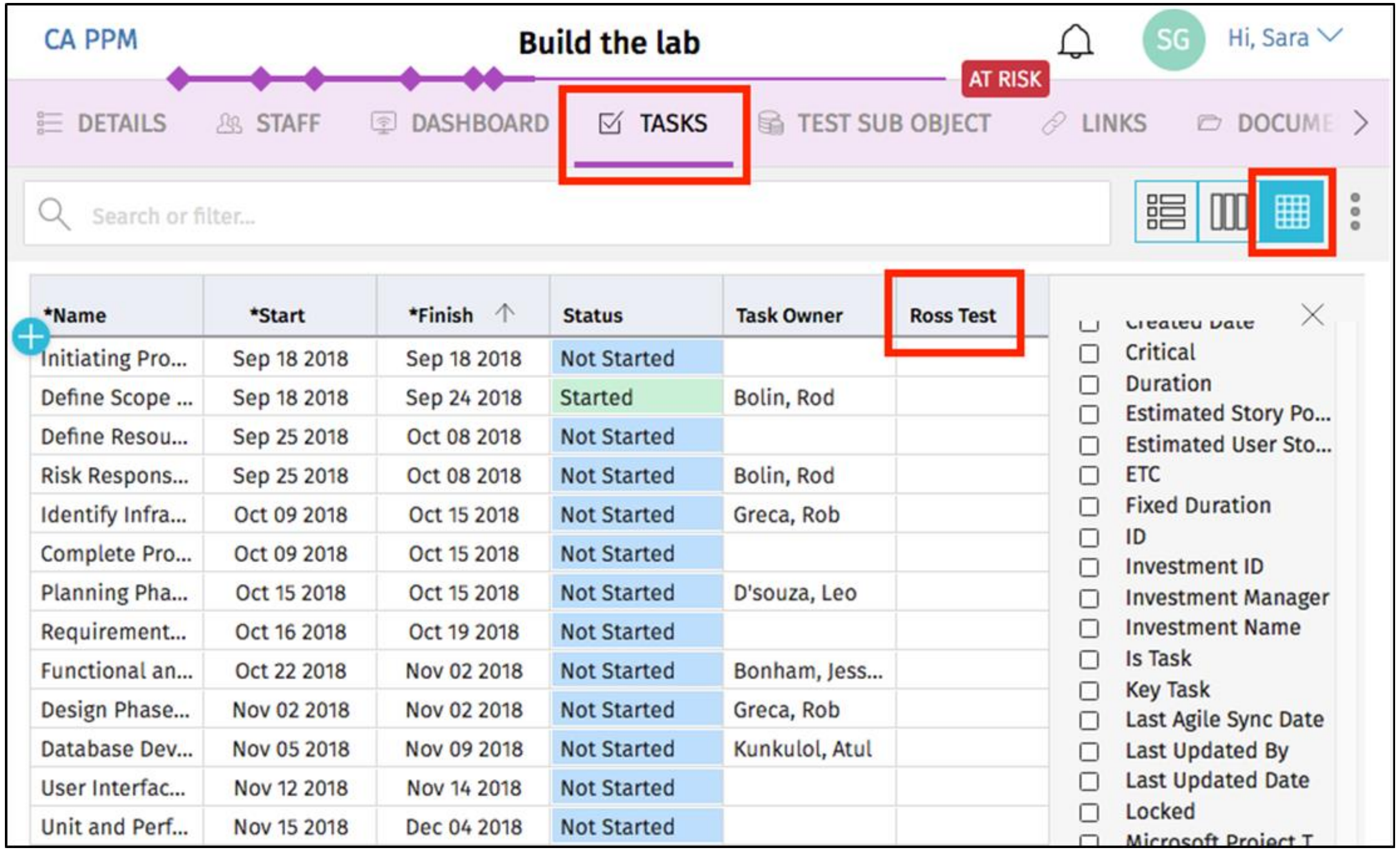
- As you can in Classic, you can now allocate multiple instances of the same role to a project, and rename the role if necessary to differentiate among the two (e.g., Developer – Junior, Developer – Senior).
- The two roles can now be assigned and replaced independently of each other.
- In 15.7, roles and resources can be replaced on the Staff tab.



Staff	Project Role	Default Allo...	Start	Finish	Booking Sta...	Open For Ti...	Allocation	Actuals
Architect - Junior	Architect	100.00%	Sep 18 2018	May 31 2019	Soft	☑	1,456.00	0.00
Architect - Senior	Architect	100.00%	Sep 18 2018	May 31 2019	Soft	☑	1,456.00	0.00
Ken Armstrong		50.00%	Sep 18 2018	May 31 2019	Soft	☑	728.00	0.00
Business Analyst	Business Ana...	100.00%	Sep 18 2018	May 31 2019	Soft	☑	1,456.00	0.00
Developer	Developer	100.00%	Sep 18 2018	May 31 2019	Soft	☑	1,456.00	0.00

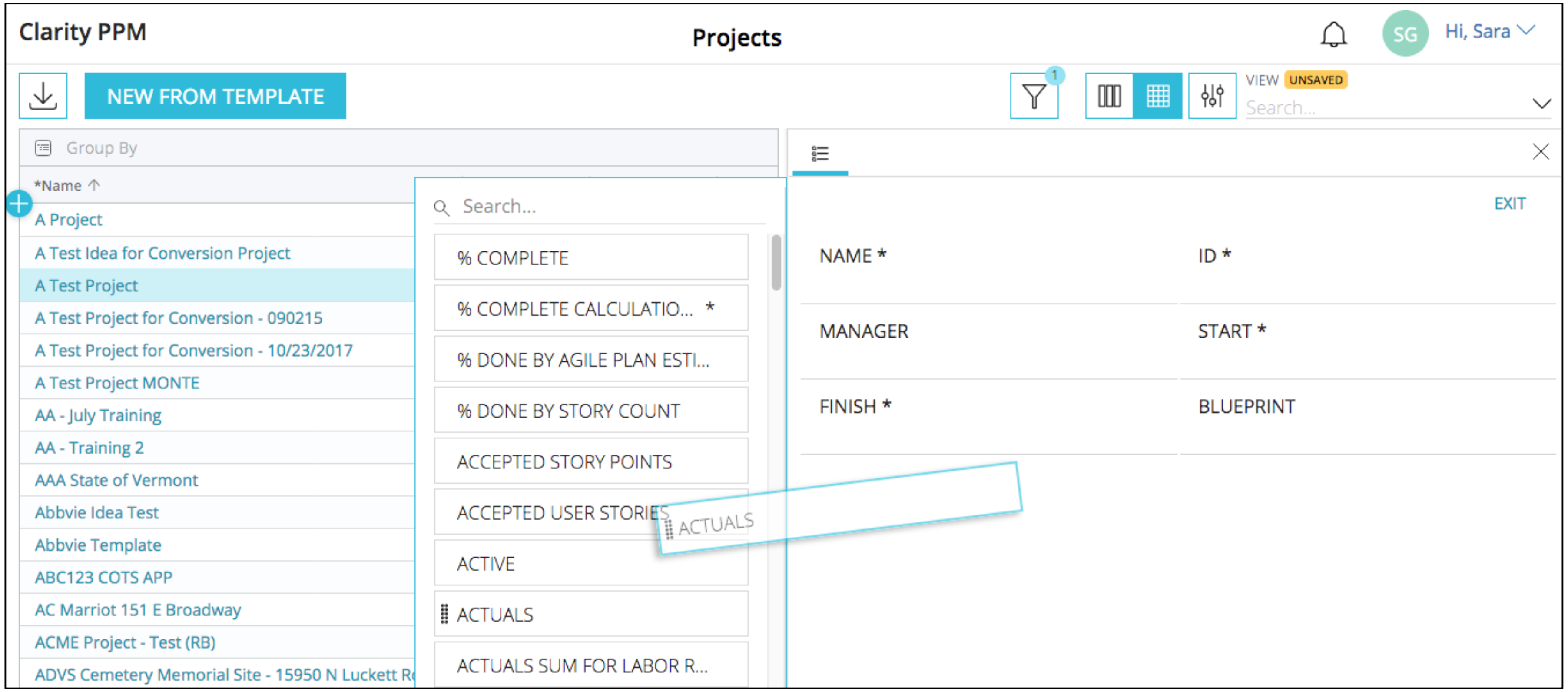
Common Grid Layout for Tasks

- The Common Grid layout has been applied to tasks.
- Custom task fields can be added to the view, and can be edited here. This is the first time you've been able to edit custom task attributes in the New UX.



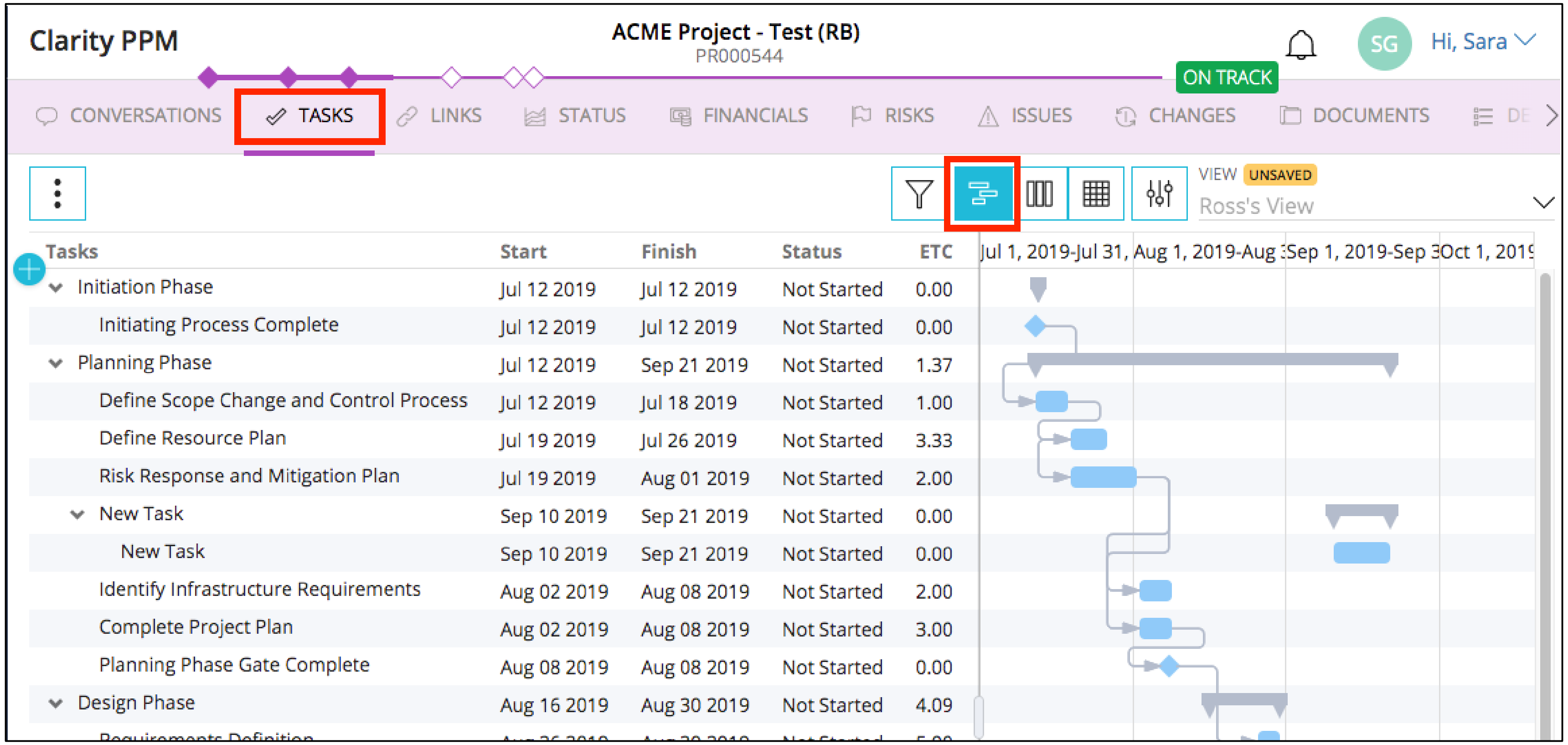
Details Panel for End User Configuration

- PMs can use the Details flyout to update Project data on the fly.



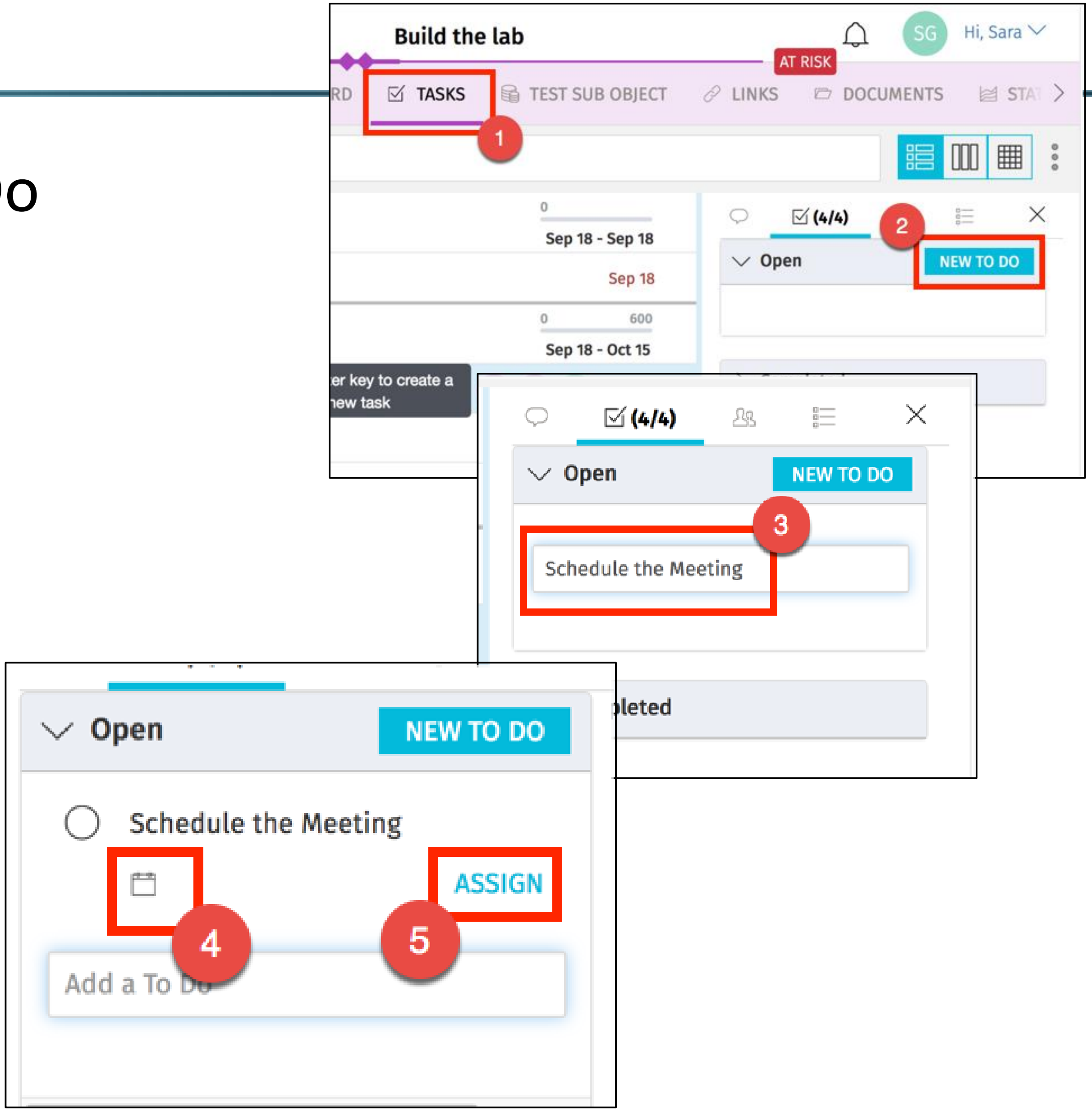
Tasks Tab – Timeline (Gantt) View – BETA in 16.7

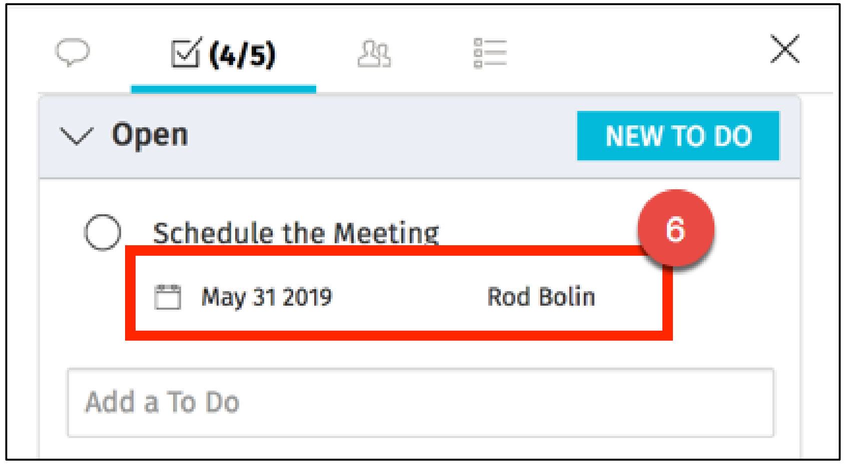
- A BETA Gantt/Timeline view is available in 15.7 for Project Tasks.
- Can still launch Classic Gantt and MSP/OWB using the 3 dot menu in upper left.
- No inline editing of tasks, but can edit in Details flyout view.
- Supports multiple levels of indent.
- Drag and drop to create dependencies in timeline portion.



To Do

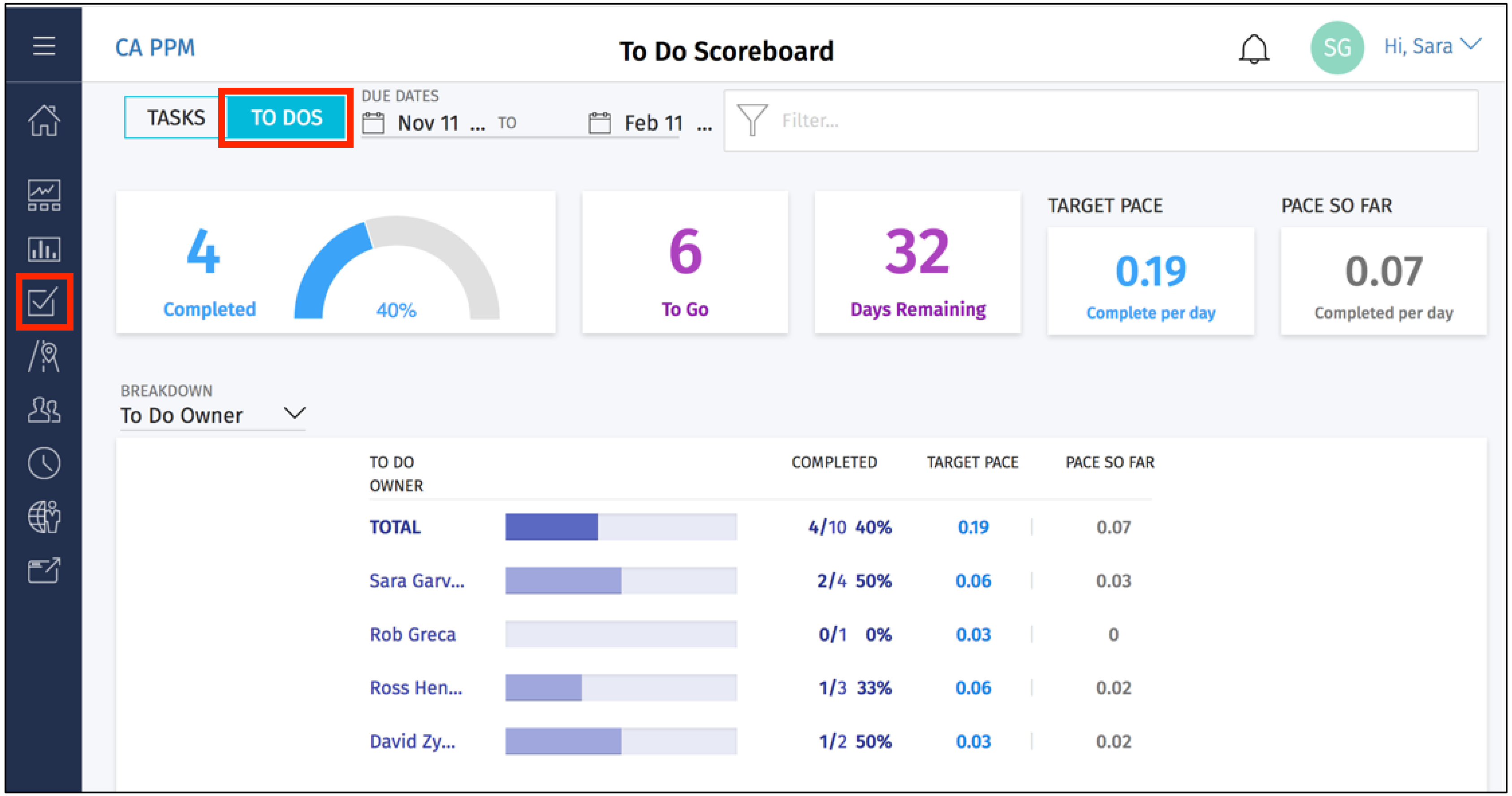
- PMs and Task Owners can capture To Do items on Projects
- To Do items may be assigned to one resource, or to one Team
- Date must fall within the Project dates.





To Do – Scoreboard

- To Do Scoreboard is available on the *Tasks* page that summarizes the pace and completion of To Do items.
- Adjust the Dates and filters to analyze completion data.



Optimize Clarity

Improve Visualization, Productivity and Classic user experience

Make Information Easier To Access

**Having your data organized, structured and current will allow for better communications and decisions.*

- Save filters and configure list views specific to you & your projects
  - Targeted information – they emphasize areas you need to manage
- Keep data current by using email reminders (e.g., regoXchange "stalkers")

Clarity - Project Compliance Inbox x

clarity@ca.com <clarity@ca.com> 1:53 PM (1 minute ago)
to chris

Project Manager: Wuenstel, Chris

You are receiving this email because at least one project currently assigned to you has data that is out of compliance. Please review the list below and address all compliance issues ASAP.

These projects have data compliance issues:

Project ID	Project Name	Stale Task Count	Late Issue Count	Late Risk Count	Late Status Report	Total Count
PR9232	Deploy Windows 7	18			No Status Reports created	19
PRJ03	Create Webcam Conference	3	1	2	No Status Reports created	7

This is an automated message. Please do not reply.

Make Flags Easy To Identify

- Use indicators to identify what needs attention - red highlights issues.
- Allows you to focus on the items putting the team, department, or company at risk.

Power Filter [Build Power Filter]

Filter | Show All | Save Filter | Clear

ID	Name▲	Overall Status	Schedule Status	Scope Status	Cost/EFT Status	Resource Status	Late Action Items	Late Issues	Late Risks	Late Milestones	Late Tasks	Schedule Var %	Days Over Base	Effort Var %	Hrs Past Base
PRUS100035	Colleague Conversion Phase II						0	0	0	0	2	(35)	82	(3,297)	(363,393)
PRUS100053	Compensation - Salary & Bonus Administration						0	0	0	0	0		0		(54,969)
PRUS100047	ESS and MSS (Employee Self Service) & CM						0	0	0	0	1	(20)	38	(20,537)	(588,504)
PRUS100228	PeopleNet Implementation - Phase I						0	0	0	5	14	(165)	301	(60)	(3,415)
PRUS100513	PeopleNet Implementation Phase II						0	2	3	26	62	(127)	302	(22)	(776)
[illegible]	Specialty PeopleSoft rollout - High Level Planning						0	0	0	0	0	(45)	24	43	0
	2011 NA PSFT Modernization						2	0	0	0	0	(3)	12	(132)	(68,846)

Milestones

	Project	Milestone	Finish▲	Schedule %	Days Late
	KI Training Project 1	Technical design complete	2/16/16		3
	KI Training Project 2	Technical design complete	2/16/16		3
	ERP Integration	Deployment Phase Gate Complete	2/17/16		2
	Radiology QPI Study	Initiation complete	2/17/16		1
	Revised Technologies Financial System Integration	Deployment Phase Gate Complete	2/17/16		2
	mcm Major Project Onsite Training for Avis	Design Phase Gate Complete	2/18/16		1
	Retina Scan - Project	Post Launch Review	2/22/16		0
	ERP Integration	Closing Phase Gate Complete	2/23/16		0
	Revised Technologies Financial System Integration	Closing Phase Gate Complete	2/23/16		0
	Radiology QPI Study	Design Complete	3/2/16		1

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Simplify & Automate Reporting

- Status Reports should be automated based on Clarity information you already update – no time to build a separate PowerPoint.
- Stakeholder information should be just the most important things:
  - More icons, less text.
  - Focus on key milestones, not tasks.
  - Highlight changes from last time, not everything.

**Scheduled reports or a formatted/filtered portlet will reduce the time and complexity required to compile stakeholder reports!*

Report Examples

Project Storyboard: eCommerce Portal

Project Manager	Martin, Paul	**Status Report Date**	2/3/2012
Project Type	Major Project	**Status**	Approved
Stage	Building	**Progress**	Started

Labor Hours

Baseline	3,992.00
Actuals	664.00
Estimate To Complete	3,448.00
Estimate At Completion	4,112.00
EAC to Baseline Variance	120.00
Remaining Allocation	3,612.00
Allocation to ETC Variance	164.00

Financial Performance

Planned Benefit	750,000.00
Planned Cost	646,000.00
Actual Cost	106,600.00
Estimate At Completion	664,100.00
EAC to Planned Variance	18,100.00
Planned ROI	14.82
Planned Breakeven	7/31/2012

Project Dates

	Start	Finish
Plan	10/4/2011	10/8/2012
Baseline	10/4/2011	10/6/2012
Days Late	0	2

Status Report Indicators

Overall		
Schedule		
Scope		
Cost and Effort		

Key Accomplishments

Key Accomplishments for this week:

- Resource issues resolved
- User acceptance test plan approved

Project Objective

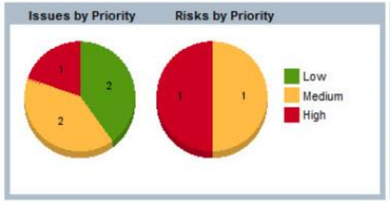
Development of a new portal for all Online Client Services

Status Report Update

There are some scope and schedule concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. Resource issues are all resolved and

Upcoming Activities

The following reviews are scheduled for next week:
- User acceptance test results
- Change Requests
- Monthly Project Review



Current Issues — More Issues...

Issue	Priority	Status	Target	Owner
Requirements are unclear		Open	2/23/2012	Morris, Tom
System architecture is non-compliant		Work in Progress	1/21/2012	Morris, Tom
Accept all possible popular pay methods		Open	2/15/2012	Hayes, Todd

Current Risks — More Risks...

Risk	Probability	Impact	Priority	Status	Target	Owner
Resource Availability				Open	2/29/2012	Thompson, Peter
Sponsorship Risk				Open	2/3/2012	Granger, Paula

Earned Value Analysis by Phase — Full Project Plan...

Phase	Start	Finish	Status	% Complete	Planned Value	Earned Value	Actual Cost	CV	SV	CPI	SPI
Planning Phase	10/4/2011	12/12/2011	Completed	100	77,200.00	77,200.00	77,200.00	0.00	0.00	1.00	1.00
Design Phase	12/12/2011	3/26/2012	Started	75	290,745.32	271,875.00	29,400.00	242,475.00	-18,870.32	9.25	0.94
Construction Phase	3/26/2012	7/19/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		
Deployment and Quality Phase	7/20/2012	9/22/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		
Closing Phase	9/24/2012	10/8/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		

Project Schedule

Project	Project Type	Risk	Planned Cost	Feb 16	Mar 16	Apr 16	May 16	Jun 16
A Fantastic Project			700,000 USD					
Anesthesia Delivery			2,629,620 USD					
Atropia Retina Scan - Project			682,080 USD					
Aurascope XA - Project			1,102,080 USD					
Avis - Project for Cost Plan Conversions			113,000 USD					
Brightlight 3000 - Project			829,520 USD					
BYOD Management			343,020 USD					
Centricity			2,357,460 USD					
Change Mgt for Internal Portal			264,400 USD					
Change Mgt for Online Order Entry			61,560 USD					
Total			**215,411,858 USD**					

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KPIs by Project Type

Application Change

Project Name	Project Manager	Start Date	Finish Date	Status	Schedule	Alignment	Risk	Resource Allocations	Resource Actuals
CRM Enhancements	Reed, Henry	11/3/2011	3/5/2012					2,280.00	1,496.00
Global Expense Application	McCarthy, John	1/2/2012	2/2/2012					90.00	35.00
Global Order Processing	Granger, Paula	5/8/2012	8/17/2012					3,064.00	0.00
HR Claims Enhancement	Sutherland, Joy	2/1/2012	5/22/2012					1,600.00	0.00
Total								**7,034.00**	**1,531.00**

Open Discussion

- How many of you have more work than hours in the day?
- What helps you make sure you get everything done?

Work With A Regular Cadence

- A predictable cadence allows the project manager to make sure they are continually focused on the right tasks at the right time.
  - Reports and portlets in Clarity are only as good as their data. It is critical that your data is always up to date. If you don’t have a regular schedule for updating your projects, you risk reporting (and managing your project) on stale or inaccurate data.
- The real power of cadence is in the habits it forms.
  - Cadence encourages discipline & discipline results in predictability. A predictable cadence helps to set expectations and provides a less stressful environment.
- Set up a consistent work schedule, one that makes sense for your team.
  - Schedules are critical, without them we have a harder time committing to a task. Like exercise, managing a project takes commitment and discipline. Making a weekly chart of tasks helps encourage this discipline.

Sample Schedule

- The following is an example of a Project Manager's weekly schedule.
  - Based on a Friday status/project team meeting.
  - Can be adjusted based on the Clarity features used.

Process	Time per Project	Sat	Sun	Mon	Tue	Wed	Thu	Fri
Team members submit their time sheet	5 min							X
Project Managers Review Pending Actuals (morning)	10 min			X				
Resource Managers Approve Timesheets (afternoon)	30 min			X				
Posted hours show up on project. PM reviews hours.	10 min				X			
Project Manager compares the planned vs actual cost to budget	30 min				X			
Project Manager updates the WBS	20 min					X		
Project Manager updates allocation for resources	10 min					X		
Project Manager reviews/updates risks, issues, changes (as needed)	30 min						X	
Project Managers Publish Status Report	20 min						X	
Weekly Team Meeting	30-60 min							X

Questions?

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Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

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