



regoUniversity 2019

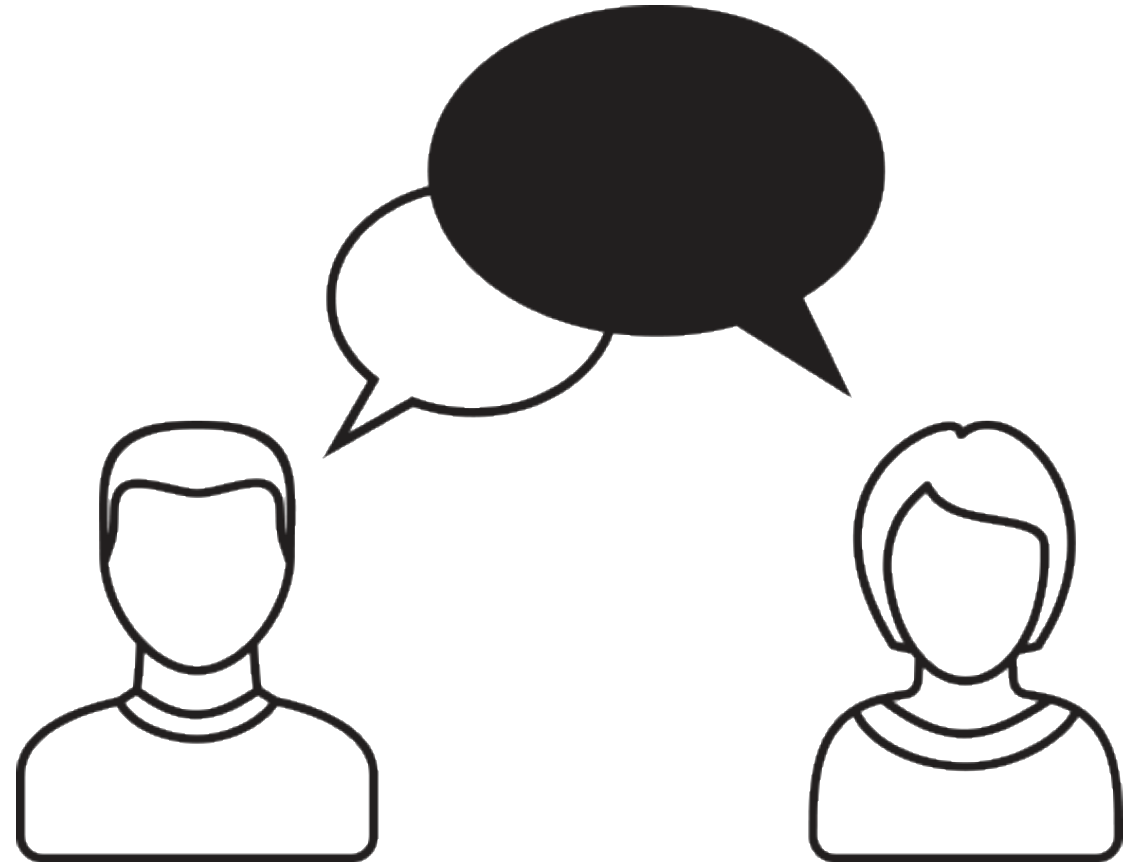
SAN DIEGO

Project Manager
Best Practice | “Day in
the Life”

Your Guides: Michelle Alexander and Mark Lindquist

Introductions

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



Agenda

- Open Discussion #1
- Typical PM Activities
- Open Discussion #2
- Use ServiceNow PPM: Get Off of Excel
- Make Information Easier to Access
- 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?



Typical PM Activities

Category	Initial Set-Up	On-going Monitor & Control	Project Closure
General Project Management	<ul style="list-style-type: none"> • Create project & populate necessary data • Ensure business case is fully defined 	<ul style="list-style-type: none"> • Add/monitor/update risks, issues, decisions, actions, and change requests • Create status reports (weekly/monthly) 	<ul style="list-style-type: none"> • Ensure all risks, issues, decisions, actions, and changes are closed or resolved • Complete final status report
Team Management	<ul style="list-style-type: none"> • Determine project work needed, estimate staffing needs and request resources, roles, or skills through resource plans 	<ul style="list-style-type: none"> • Confirm and allocate resource plans with named resources • View variances between planned hours, allocated hours, and actual hours • Modify resource plans as needed and create corresponding change requests 	<ul style="list-style-type: none"> • Complete resource plans
Task Management	<ul style="list-style-type: none"> • Build project schedule/WBS • Sequence phases, tasks, milestones; add dependencies • Assign tasks to appropriate team members • Set Baseline • Review Critical Path 	<ul style="list-style-type: none"> • Ensure project team members are updating task states and percent completes • Communicate with team members via task work notes 	<ul style="list-style-type: none"> • Ensure all phases, tasks and milestones are Closed Complete
Financial Management	<ul style="list-style-type: none"> • Create cost plans • Create benefit plans • Assign project budget 	<ul style="list-style-type: none"> • View project variance between budgets, planned costs, and actuals; create corresponding change requests • Calculate Estimate at Completion • Monitor ROI%, Discount Rate %, IRR\$, NPV 	

Open Discussion #2

- How much time do you spend managing the data in ServiceNow PPM?
- What functions seem to be cumbersome?
- Which parts of the tool make things easier?
- How do we make the cumbersome items easier?



Use ServiceNow PPM: Transition Away from Supplemental Tools

- Use ServiceNow PPM to manage all aspects of your Investments, wherever possible:

- Risks / Issues / Decisions / Actions / Change Requests
- Use Phases / Milestones / Tasks
- Use Baselines
- Use Cost Management
- Use Status Reports
- Monitor Team Allocations/Availability



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

ServiceNow PPM User Experience Facilitates Collaboration

- Tasks assigned to project team members appear in their My Work.
- Use ServiceNow Connect to instantly share ideas, knowledge, progress, and documents instead of communicating via disparate systems.
- Tag project team members in work notes to generate an email communication using the “@John Doe” tagging feature.
- Work together with resource managers to request, confirm, and allocate resource plans.

Make Information Easier To Access

- *Having your data organized, structured and current will allow for better communications and decisions.*
- Use Project Workspace....
 - Analytics tab to easily track:
 - Risks, issues, decisions, actions, and changes
 - Phases, tasks, and milestones
 - Resource allocations and logged project hours
 - Planning tab to easily build projects tasks through the Project Workbench or the Planning Console
 - Resource tab to manage resource plans
 - Financials tab to manage cost plans and benefit plans
 - Status Report tab to create status reports and view the latest

Note: One Project Workspace per Project

Make Information Easier To Access

Use the Investment Portal to manage your full portfolio of projects

- Understanding overall planned costs, estimates at completion, budgets, and actual costs
- View all projects on an overall timeline
- View all cost plans, benefit plans, and expense lines
- Share with other users for ease of communication

Simplify & Automate Reporting

- Status Reports can be created directly in the system – no time to build a separate PowerPoint.
- Easily create and schedule reports for ease of communication
- Create dashboards with appropriate widgets to streamline data

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

Report Examples

Project Manager Summary - Dashboard

Status: ✔ Percent Complete: % Risks: 0 Issues: 0 Actions: 0 Change Requests: 0

Overdue Tasks and Milestones

Number | Short description | Planned end date | Assigned to | State

No records to display

Upcoming Tasks (until next 2 weeks) With No Assignee

Number | Short description | Planned start date | Assignee

No records to display

Project Member Allocation Details (Hrs)

User	Total Hours
Corinne Cowan	~800
Millicent Ekstrom	~200

Project Member Allocation Details - Monthly (Hrs)

Month starts on	2018-07-01	2018-08-01	2018-09-01	2018-10-01	2018-11-01
Corinne Cowan	104	199	153	184	110
Millicent Ekstrom	30	40	39	40	30

PMO Director Dashboard

PMO | PMO Financial

Open Risk: **263** Open Issues: **94** Active Projects: **61**

Open Risk

Risk Category	Risk Count
Low	~75
Moderate	~68
High	~63
Absolute	~58

Group by: Probability | Stacked by: -- None --

Open Issues

Issue Priority	Issue Count
4 - Low	~94

Group by: Priority | Stacked by: -- None --

Late Projects by Portfolio

30

Active Projects by Project Manager

12

Open Discussion #3

- 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 dashboards in ServiceNow PPM 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 ServiceNow PPM features used

Process	Time per Project	Sun	Mon	Tue	Wed	Thu	Fri	Sat
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, decisions, actions, 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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- Access your account at pmi.org
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- 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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