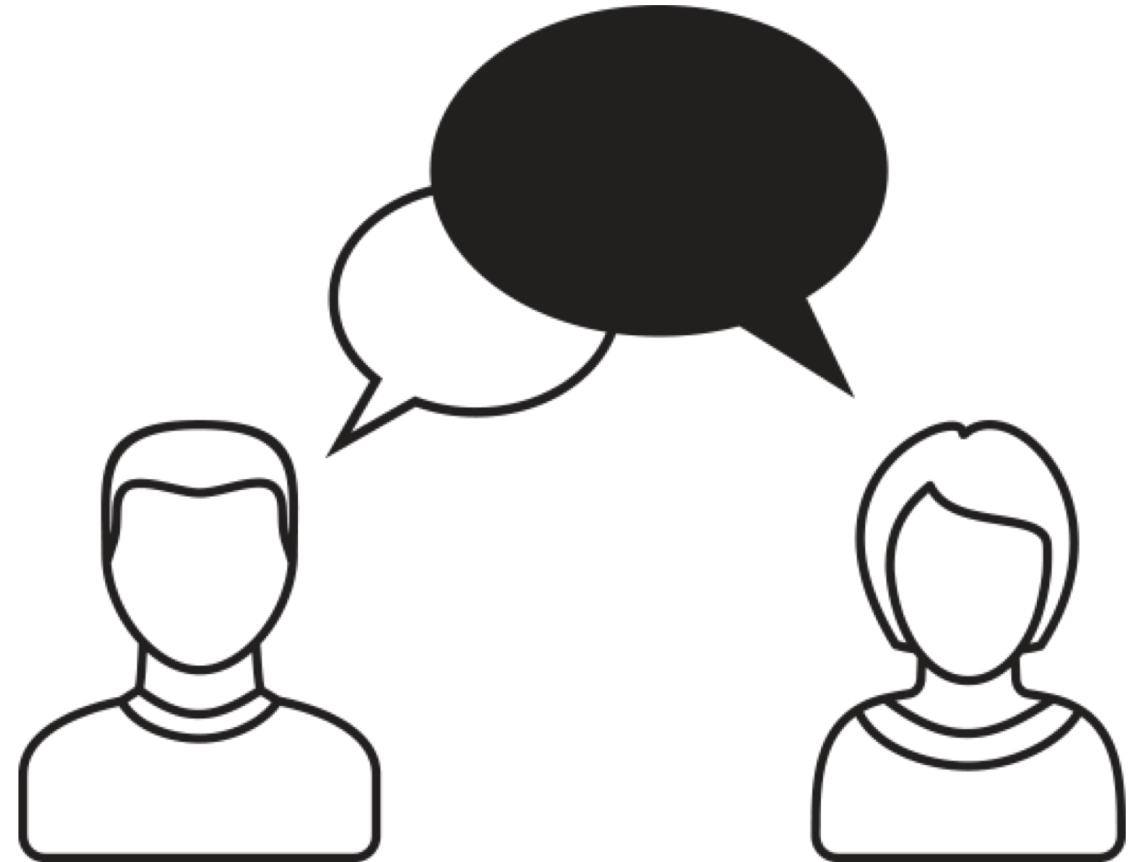


Project Manager | Best Practice “Day in the life”

Your Guides: Sara Garvey and Clayton Reynolds

Introductions

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



Agenda

- Open Discussion #1
- Typical PM Activities
- Open Discussion #2
- Use CA PPM: 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

- 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. 	<ul style="list-style-type: none"> Add/monitor/update risks, issues, and change requests Create status reports (weekly/monthly) 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Determine project work needed, estimate staffing needs and request roles or resources. 	<ul style="list-style-type: none"> Confirm roles filled with named resources. View variances between planned allocation, ETCs and actual hours. Modify resource allocations as needed. 	<ul style="list-style-type: none"> Set resource allocations to reflect project close date. Set “Open for Time Entry” to no for all resources.
Task Management	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> Update project schedule with task status (started/complete) Monitor for proposed ETCs. Adjust ETCs as needed. Run Auto-Schedule 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Create Cost/Budget/Benefit plans 	<ul style="list-style-type: none"> View project variance between budget and actuals. Introduce change requests as needed. 	

Open Discussion

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



Use CA PPM: Transition Away from Supplemental Tools ⁷

- Use CA PPM 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.*

** 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.*

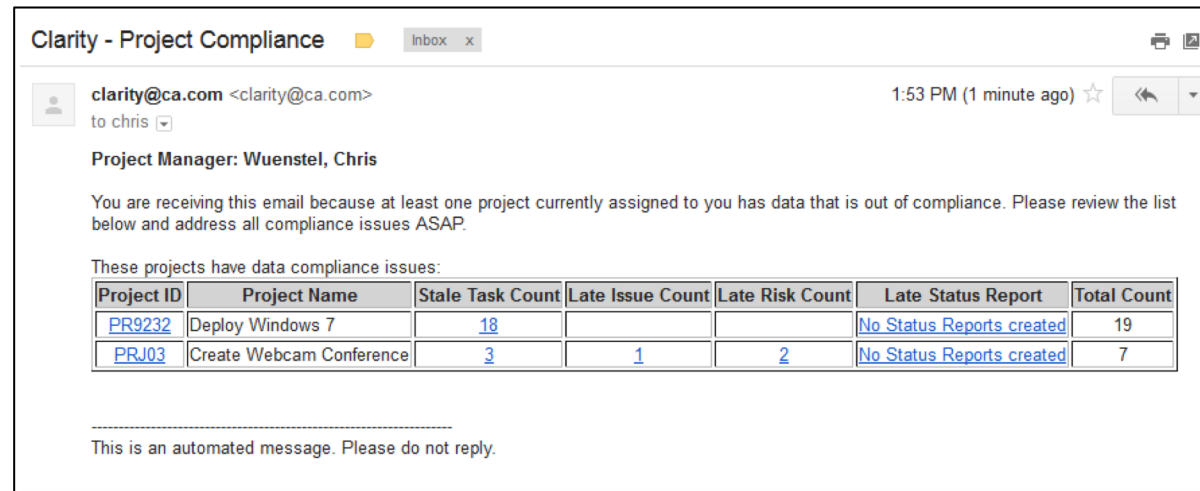
CA PPM New User Experience Facilitates Collaboration

8

- Discussions are the primary landing page upon accessing a project in the new User Experience, available beginning in v15.1.
 - Team members can be tagged in conversations (15.2), and notifications and alerts can be managed within the tool.
- Resource requests can be tagged to a Resource Manager, and RMs can re-assign requests if necessary.
 - Notes/discussions remain tied to the request.

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”)



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)
PRUS100974	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

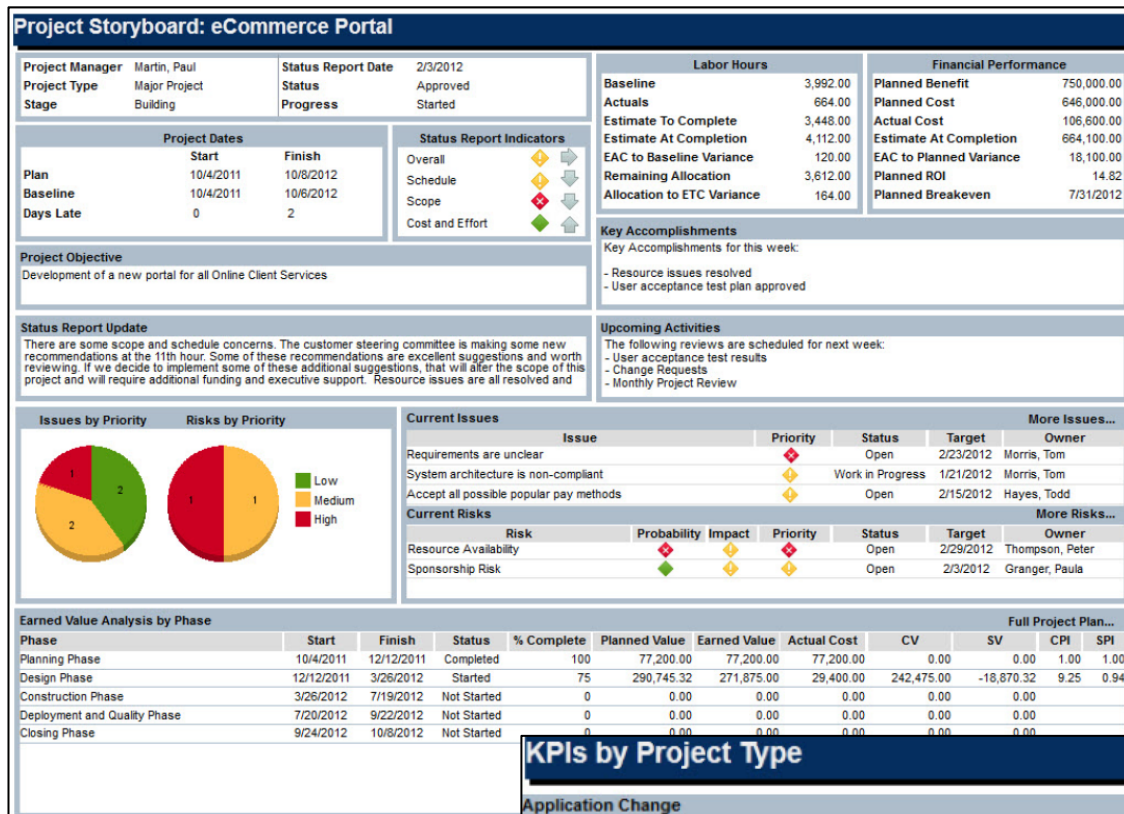
Page 4 of 6 Displaying 31 - 40 of 57

Simplify & Automate Reporting

- Status Reports should be automated based on CA PPM 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 Schedule

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

Page 1 of 15 Displaying 1 - 10 of 142

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	Green Diamond	Red X	Green Diamond	Yellow Diamond	2,280.00	1,496.00
Global Expense Application	McCarthy, John	1/2/2012	2/2/2012	Red X	Red X	Green Diamond	Green Diamond	90.00	35.00
Global Order Processing	Granger, Paula	5/8/2012	8/17/2012	Red X	Green Diamond	Green Diamond	Red X	3,064.00	0.00
HR Claims Enhancement	Sutherland, Joy	2/1/2012	5/22/2012	Red X	Green Diamond	Green Diamond	Yellow Diamond	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 CA 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 CA PPM 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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- Click on **Report PDU's**
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- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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- Click on **I agree** and **Submit**



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