

Paul Major (bottom right) of Program Framework looks at what you should know before deploying enterprise project management solutions.

PREPARE TO SUCCEED

ONE IMPORTANT way organisations can reduce the risk of project failure is by investing in some good planning tools that are fit for purpose and that work!

Whilst a range of such tools have been available for a number of years, the problem for many organisations with complex projects, happening in diverse locations, starting at different times, is that simple planning aids are not enough. This demand for more “joined-up” planning has resulted in the arrival of a new breed of “enterprise” solutions specifically targeted at this need.

So if you are considering implementing such an “enterprise” solution how should you make a start?

Having spent the last five years watching, talking to and working with a wide range of organisations that have deployed – or attempted to deploy – an enterprise project management (EPM) solution, here are six common pit falls or “bear traps” that you might like to avoid for yourselves!

1. It is not about technology

Perhaps we should ask where not to start? We’re looking for a tool, a technology based answer, yes? Big mistake!

As you know very well, successfully managing complex projects is all about people and process – it’s what you do for a day job! When you move from one project to multiple projects, running in complex programmes and portfolios why would you assume you need less people and process?

The truth is a successful EPM solution is just that, a solution. A combination of people, process and technology integrated to meet a complex business need, where the technology is the least important part (see figure 1).

If you are not ready to give serious thought as to how your business processes and people interact for planning purposes, then you are not ready for an EPM solution. Why not? Read on...

2. Maturity is capability

Your ability to deploy capability in your

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organisation is dependent on your project management and process maturity. A planning solution can, for example, deliver time-sheeting functionality.

But ask yourself – can you currently get all your resources to fill in their timesheets by 11am each Monday and if you can, do their line managers ever have them signed off by 12am? Due to the functional richness of many EPM solutions it is easy to be suckered in to the “I want it all and I want it now” trap.

The reality is, however, that you will never successfully deploy more capability than your organisation is mature enough to handle.

Don’t get sold on “Gucci” functionality or sexy screenshots. Instead think pragmatically about where the biggest benefits lie for your organisation and create a roadmap that allows you to achieve these in simple steps.

Often, just the ability to collaborate effectively within project teams, sharing documents, viewing team calendars or managing issues and risks has significant benefits and from a process point of view, is very easy.

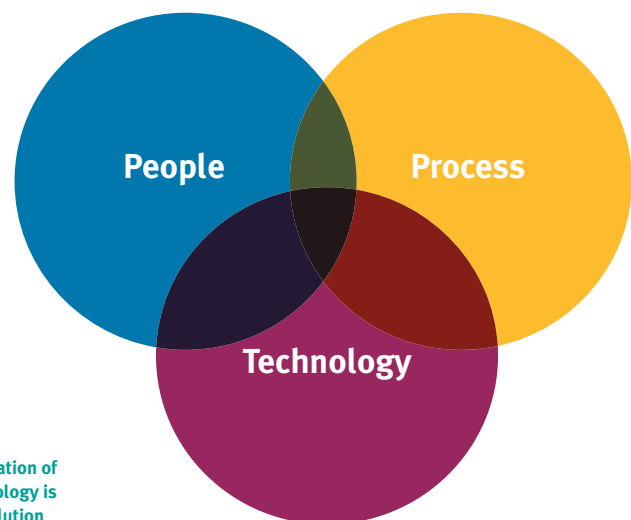


Figure 1.

INTERACTING: The combination of people, process and technology is vital to a successful EPM solution

Use the solutions to create a common understanding and language that people can work with before you take on the task of building a Space Shuttle!

3. It is more than a schedule

Speaking of collaboration, sophisticated enterprise project management solutions such as Microsoft's Project Server 2007, whether delivered as a hosted service, or running on a firm's internal infrastructure, provide far more than just a scheduling engine.

Broadly speaking these solutions offer four additional areas of capability which you need to think about when planning a deployment.

- Collaboration – the ability for all project team members to collaborate and share information e.g. reports, documents, bulletin boards, issues and risks.
- Reporting - the capability to dynamically report on any information attached to or contained in the project database e.g. costs, progress, issues, location, phase etc.
- Process adoption – the opportunity to reinforce the business's desired planning approach via tool configuration e.g. enterprise plan template's, mandatory project codes.
- Resource management - the ability to allocate, manage, forecast and track resources availability, actual work and non project work by individual, team, skill or generic resource type.

It is important to consider the capability required in each of these areas and, in the context of your organisation's maturity as described above, decide on a pragmatic approach to deploying these capabilities over time.

4. It is a database

EPM solutions are all about joining up your project data, allowing you to look at resources by type across all projects or look at cost performance on manufacturing projects in your Asian division.

To collate and aggregate all this information requires a database. As you probably know, if you have spent many years trying to collate project information with "home made" access-based reports, the key to getting a database to work properly is to think about how you structure it.

This is particularly true of complex databases that combine different data dimensions such as cost, time, documents, dependencies and skills. The key to successfully setting up these databases is to have a good (and future proofed) sense of what information you really want to capture.

Start perhaps by asking yourself, "if I had one sheet of paper to tell me how my world was performing, what information would I want on it?"

Also think about what are the fundamental building blocks of your planning world. Do you plan by geography, market, team or phase? And what is a plan anyway – is it a work package or a product?

Remember, if you don't ask the right questions now you won't get the right answers. Understanding how you want to structure your

project data is all about asking the right questions.

5. Big bangs tend to cause big disruption!

An EPM solution is complex and implementation requires a structured, phased approach. This is less about the difficulty of making the technology work (in most instances at least) and more about understanding how it interfaces with the business. Think of an EPM solution deployment as a small scale version of an ERP or supply chain solution implementation and you won't go far wrong! This doesn't mean EPM isn't suitable for small or growing organisations or teams.

Indeed, solutions like Microsoft's can even be provided as a fully hosted "Software as a Service" in pre-configured formats for rapid deployment, if required.

For larger organisations, though, experience suggests taking a measured approach, typically associated with four key phases:

- Envisioning – creating a common start point both in terms of an understanding of what an EPM solution can provide and also gaining agreement on what the organisation needs from a planning solution.
- Proof of concept – demonstrating enough functionality for the business to really understand how the EPM solution would work in their environment. The PoC will make sure the business is going to get what it wants before committing significant budget.
- Pilot - A pilot should involve a live deployment of the solution with all accompanying business processes implemented in a small part of the organisation. The pilot is not a test; it should be configured as the end solution and it is there to prove that your people can live with the processes and functionality you have designed.
- Phased deployments – follow a successful pilot and are simply a case of scaling the solution from a "user" point of view e.g. training users. Significantly, the functionality should never be increased between pilot and deployment with any additional functional requests being saved instead for future phases of deployment.

6. Get the right skills

If all of the above sounds far too daunting and more trouble than it's worth, then don't worry – it needn't be. Getting the right skills in place to support your EPM solution

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deployment is critical to success and something to be addressed from the start.

A successful EPM deployment needs a specific set of skills that rarely reside in one organisation or even more in one person.

In a typical EPM deployment there are three different sorts of expert required:

*An EPM consultant who typically has an understanding of how business works, is process oriented, aware of the technology and is used to shape the engagement and facilitate business change;

*An EPM configurer who is akin to a business analyst with good project management and process knowledge, but critically who has very good enterprise project tool configuration knowledge and experience.

*An EPM Technician who has knowledge of the software installation requirements and can architect both hardware and software requirements.

Interestingly the majority of the deployment will be undertaken by the configuration specialist with support from an EPM consultant. The technician is typically only involved for 15% of the deployment (see figure 2).

So if you want the benefits of “joined up” project management, visibility of all your projects’ progress, control of resources and where they are allocated, insight into the real cost of project overruns, then perhaps an enterprise project management solution

Figure 2.

KEY TO SUCCESS: A successful EPM deployment needs a specific set of vital skills - each using a set proportion of time and effort

is for you. If it you think it is, then pay heed to the warnings above and you could reap significant rewards: ignore them and proceed at your peril!

Paul Major is a director of Program Framework, a Microsoft EPM partner, who has been advising organisations in EPM for five years.

	Business Skills	Configuration Skills	Technical Skills
Traditional Technology Department	10%	20%	70%
Successful EPM Deployment	25%	60%	15%

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