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Project Portfolio Management & The Rapid Implementation HCM Methodology

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IHRIM Pre-Conference Education

Index

- Outline of Presentation
- The Industry Analysts & Direction
- Overview of Project & Portfolio Management
- HCM Rapid Implementation Methodology
 - Complete Project Life Cycle Tool-Set
- Case Study (Live)
- Moving Forward Strategy
- Leadership

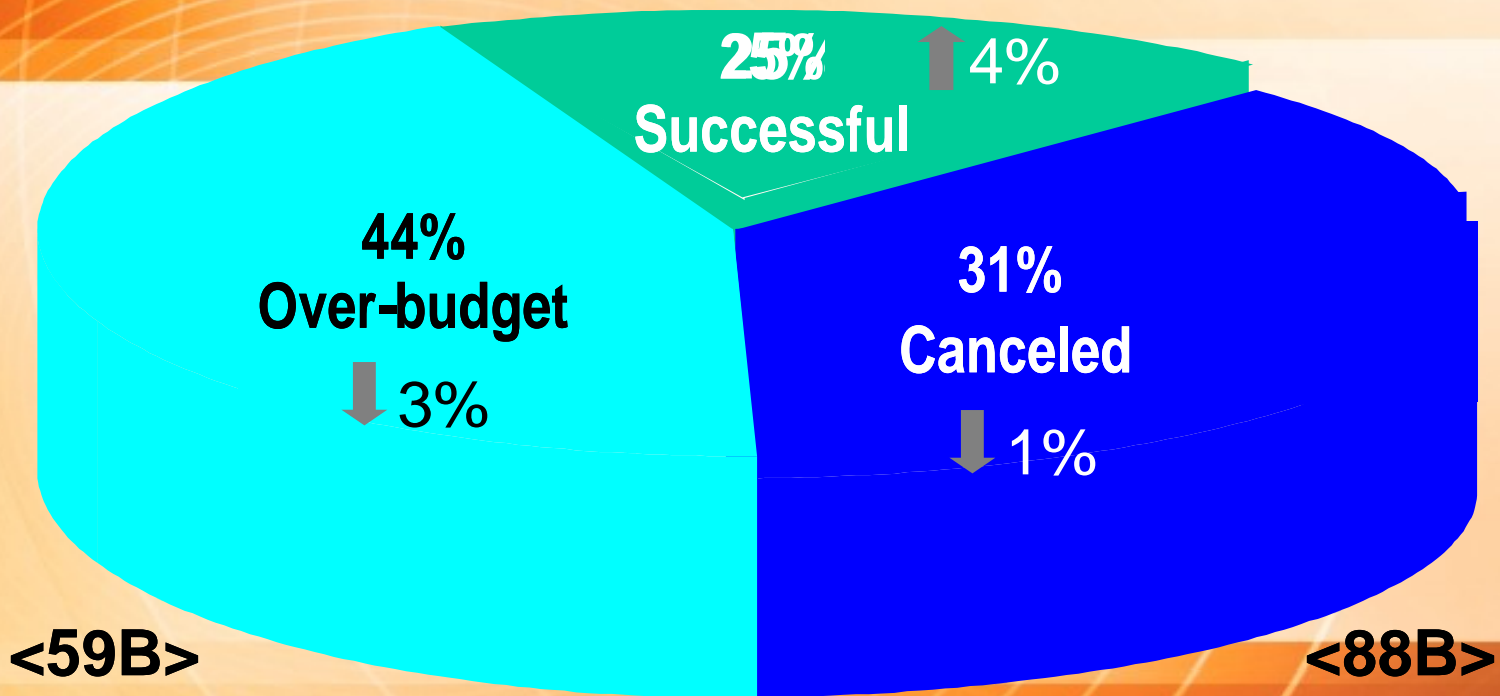
Who Gains the most:

- Executives
- Line Managers
- Project Managers
- Project Teams
- Vendors
- Anyone who can NOT risk not having the most advanced strategies, tools and network of people

You will learn...

- How to sponsor and run projects light-years ahead of industry standards – become visionaries that execute
- How to proactively run your business – learn beyond the balanced dashboard to execution
- How to proactively leverage your firm's resources (money and human capital) more effectively
- Stronger leadership to execute & secure approval for high-return projects
- Bonus: 1 hour Project Coaching session Maturity Evaluation model

1996- 2006 Average Industry Benchmarks



31% of all software projects are canceled before completion
44% of all software projects overrun cost estimates by 180%
25% of all software is considered *successful* upon completion

The Industry

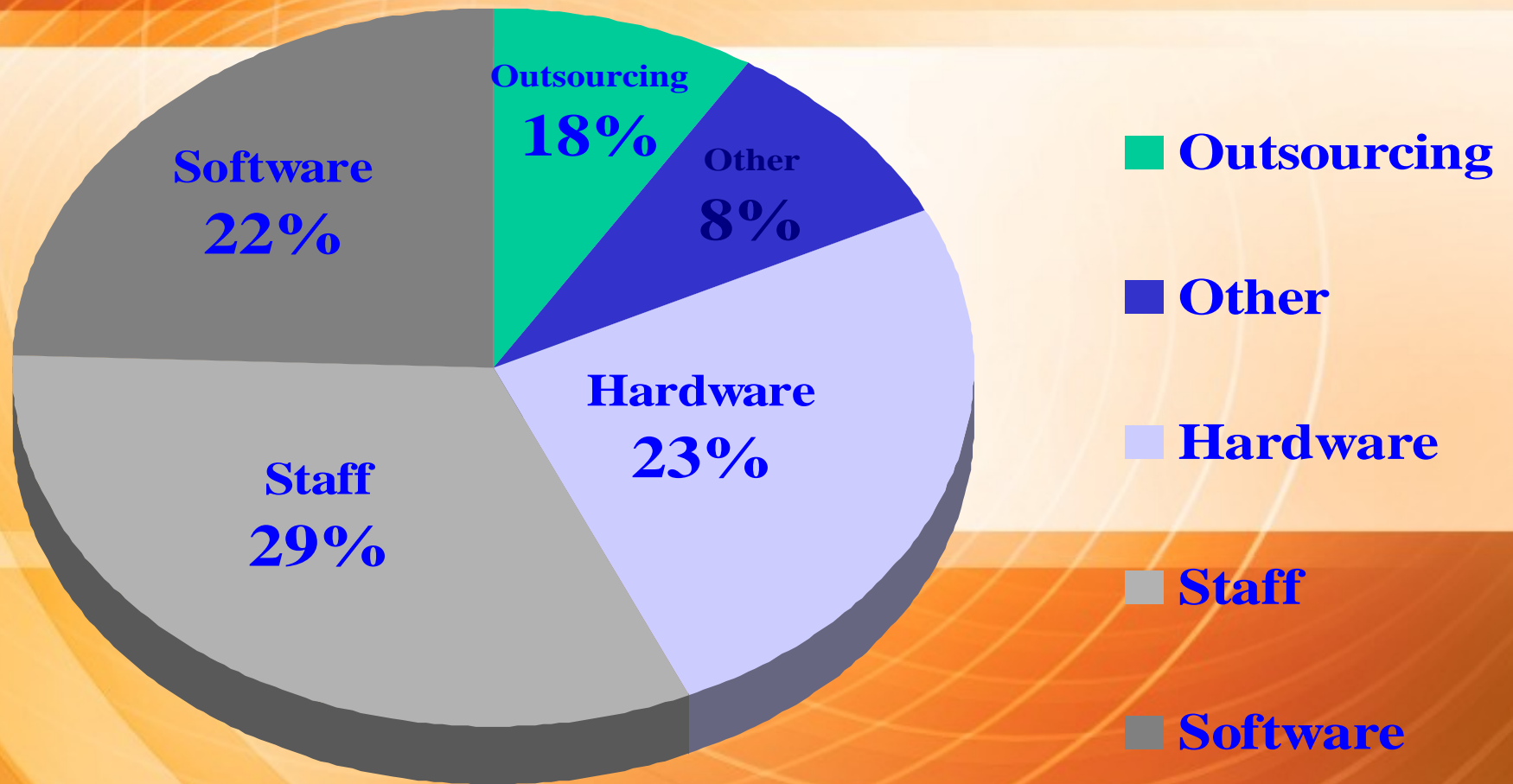
Key Reasons for Unsuccessful Projects

- Poor/lack of project planning
- Shortage of technical & project management expertise
- Lack of technology infrastructure
- Disinterested senior management
- Inappropriate project teams
- No methodology or process

* According to Gartner Group

The Technology Pit

Where companies are spending their money...



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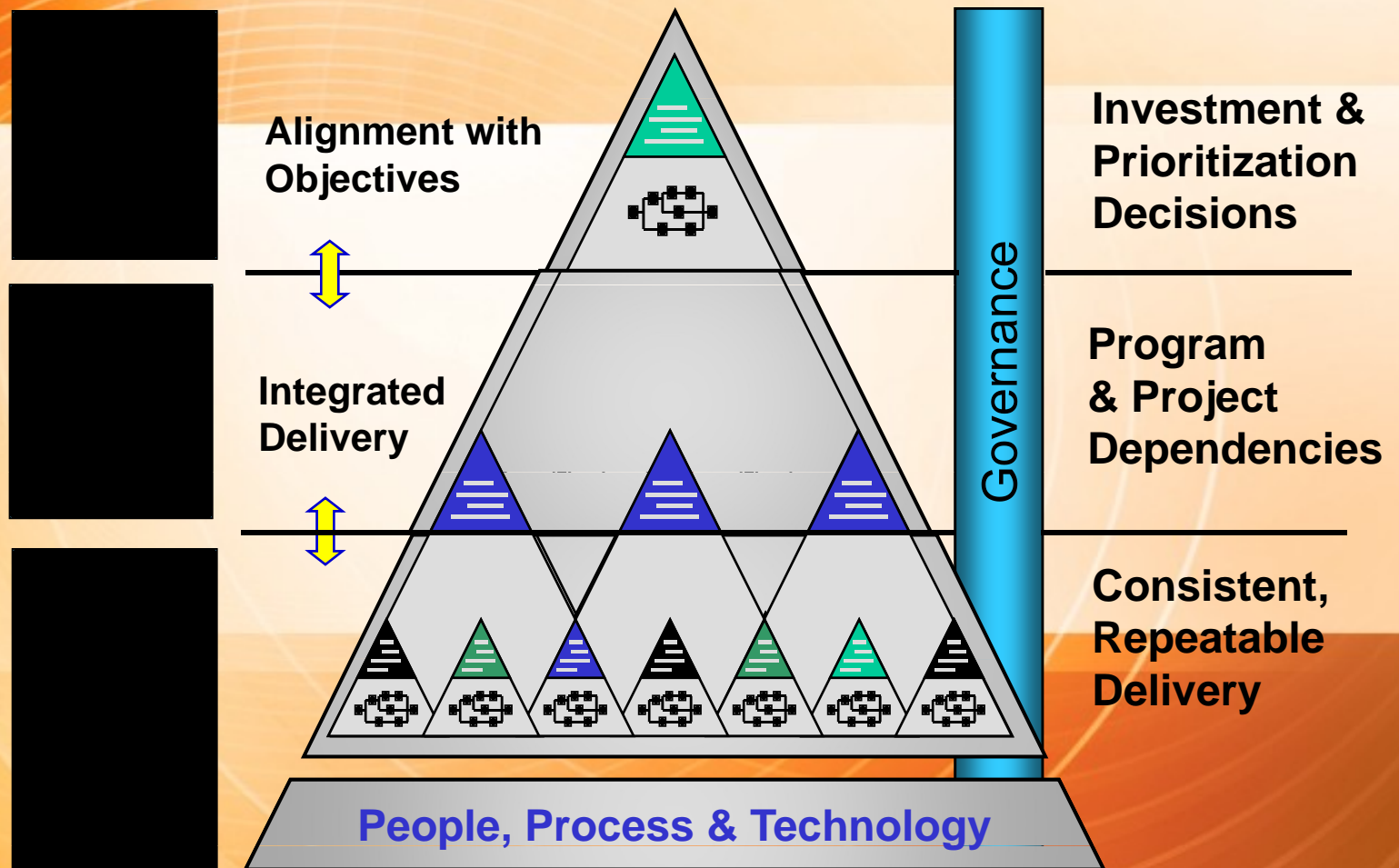
CIOs As Strategists

Gartner Inc. recently surveyed 1,400 CIOs and asked them to rate their priorities for 2007 on a scale from 1 to 10.

CIO PRIORITY	2005	2006	2007	3-YEAR CHANGE
Improving business processes	1	1	1	↔
Controlling enterprise-wide operating costs	3	2	2	↔
Attracting, retaining and growing customer relationships	*	3	3	↔
Improving the effectiveness of the enterprise workforce	*	*	4	
Need for revenue growth	6	8	5	▲
Improving enterprise competitiveness (bottom-line profitability)	*	5	6	▼
Expanding use of information/intelligence in products and services	7	6	7	▼
Deploying new business capabilities to meet strategic goals	*	*	8	
Entering new markets, new products or new services	*	*	9	
Faster innovation (shorter product/service lifecycles)	10	9	10	▼

N=1,400; *INDICATES A NEW QUESTION; SOURCE: "CREATING ENTERPRISE LEVERAGE: THE 2007 CIO AGENDA," GARTNER INC., 2007

Relationship of project, program & portfolio management



Related Terms and Concepts

- Project management is the process of planning, measuring, and taking corrective action to complete a specific project on time, within budget, and meeting scope and quality expectations
- A Program is a project or a collection of related projects which facilitate the realization of strategic business objectives.
- Program Management is the integration of a set of projects and/or programs. It involves detailed communication and insurance of conformity to process, quality, and architectural standards.

Terms and Concepts

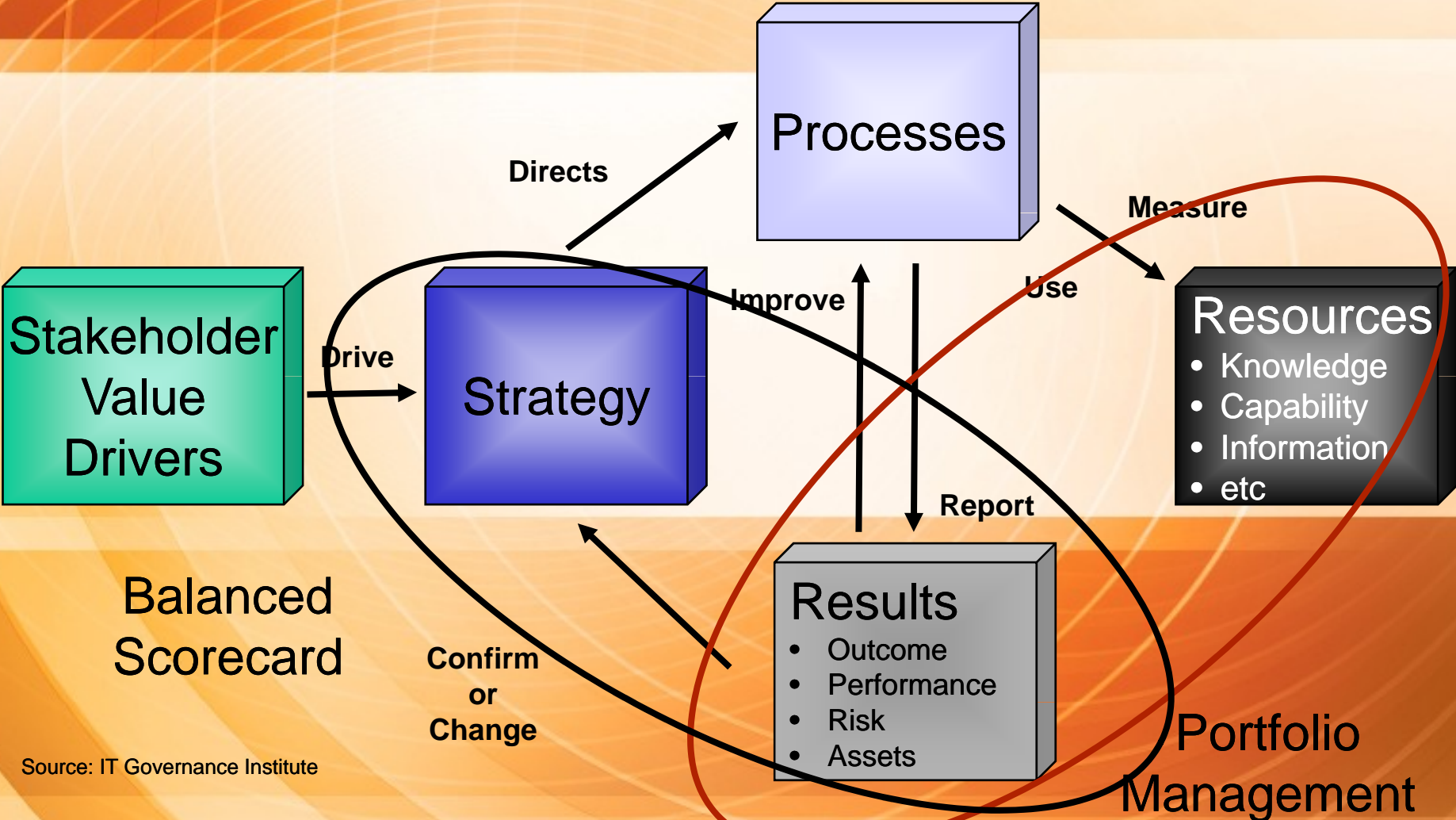
- IT Governance is the responsibility of the board of directors and executive management. It is an integral part of enterprise governance and consists of the leadership and organizational structures and processes that ensure that the organization's IT sustains and extends the organization's strategies and objectives. (IT Governance Institute)
- Portfolio Management is the process of aligning investments with corporate business needs and the analysis and proper mitigation of investment risks. It involves the selection of work to be managed and delivered as well as the oversight of progress against plan

RIM - The Balanced Dashboard

Balanced Scorecard

- The RIM Dashboard covers the complete Cycle..
- The (Norton/Kaplan) “Balanced Scorecard” is used to communicate and execute strategy and organizational performance
 - The “Strategy Map” is used to articulate and communicate strategy
 - A “Scorecard” is used for performance measurement and reporting
- The Balanced Dash Board & Scorecards are an integral part of an effective Governance framework as it facilitates
 - IT Alignment with business strategy through project prioritization
 - IT value realization – project benefits

IT Governance Overview



Source: IT Governance Institute

What are the Business Challenges that Portfolio Management can solve?

- How do I prioritize initiatives across my organization?
- What is the status of our top five initiatives?
- Do we have the right people working on the right projects?
- Do we leverage knowledge and best practices across people and projects?
- Do we have the skills and capacity within our organization to achieve our long term goals?



Live Case Study Index

➤ **The Industry, RDM & MPI Partnership**

➤ **Where Are We**

Rapid Implementation Methodology (R.I.M)

- System Implementation Lifecycle
- Project Management Discipline
- Leadership & The Maturity Model

➤ **Where Are We Going**

- Positioning BioMed, Your Teams and The Leaders

Dash - Rapid Delivery Model (R.D.M.)

- Portfolio Management for System Implementation Lifecycle
- Portfolio Management for Leadership
- Blended Portfolio for Project Management, ROI, Leadership & The Maturity Model

Today's Perceptions of Projects

- Not a disciplined approach
- Global rollouts rarely occur
- Delivery is too slow
- Too costly
- Management frustration with lack of pace
- Difficult to substantiate ROI

Accomplished


Where Are We What Did We Do!

Took Action

- Maximized Team Collaboration
- Built and Relabeled Rapid Implementation Methodology (R.I.M.)

**Reference SMM & POM for RIM & Next Slides*

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Project & Strategy Chart
presented at IHRIM

IHRIM Pre-Conference Education

Accomplished

BIOMED

Rapid Implementation Methodology (R.I.M) Portfolio Management



RDM Project
Foundation

Education &
Training – Start Building

Build RDM Team

RIM Tool-Kit
(May-June)

Execute Phase
II

*An evaluation will be
made – Build Dashboards

Rapid Product Development & Delivery

Accomplished

R.I.M. & The Dashboard



Maximum Potential International

The strong partnership, provided the following benefits to BioMed:

- Defined a disciplined model
- Reduced Time to Market – roll out systems faster
- Outstanding Quality & Service for Our clients
- Fine tuned and enhanced delivery for BioMed clients
- Reduced Total Cost of Ownership
- Leadership development embedded in methodology
- Team has enhanced collaboration, productivity & Skills

Strategic Measurement Matrix

Rapid Delivery Model Portfolio Management

OBJECTIVE	STRATEGY	INITIATIVE	PAYBACK	Est. First Year ROI
Implement Project Disciplines (New project: RDM) Proactive management reporting Lower implementation costs Enhance quality Deliver more quickly	Define a methodology that can be leveraged across projects. Constantly monitor and improve process.	Implement defined processes Utilize SMM and POM Use R.I.M. as the base to jump-start & reduce cost	Deliver projects faster Improve performance of contractors Reduce consulting costs Higher quality No rework Proactive reporting	900k
Define project milestones	Identify consistent milestones across all projects	Define phases: Project Planning Quality Controls /Organization Rapid Re-engineering Detail Fit Reports & interfaces Testing Conversion Security Production Training and Communication Leadership	Deliver projects faster Higher quality Consistent documentation Project tracking Create raving customer	

**See detail SMM & POM for RDM*

Strategic Measurement Matrix Rapid Delivery Methodology Portfolio Management

OBJECTIVE	STRATEGY	INITIATIVE	PAYBACK	Est. First Year ROI
Empower Team	Define a consistent approach owned by team	Common forms, templates, phases	Enhance productivity Enhance satisfaction Additional training and education Reduce consulting costs Greater support of management Engaged project managers No surprises to management or customers Create heightened support of management Better resource utilization Self-directed Sr. Director able to focus on global and executive issues	
Risk and Cost Mitigation	Follow a disciplined approach so risks are identified early	Benchmark costs, Evaluate people productivity	Cost savings	
Ensure Collaboration with Our Customers	Engage customers throughout project	Institute customer sign-offs throughout project	Enhance and leverage our customers experience	
Implement Project Portfolio (Phase II)	Define and implement project portfolio	Implement dashboard process	Business community involvement	
Leadership and Reporting *See Detailed Strategic Measurement Matrix	Integrate leadership within RDM Hold partnership meetings	RDM has embedded leadership disciplines	Provides for proactive delivery of projects while employees are empowered Employees have enhanced level of accountability and ownership Increase speed and quality of delivery Proactive so deadlines are not missed	

Rapid Implementation Methodology (R.I.M.)

R.I.M. is a comprehensive methodology that helps executives and project team members turn vision into reality. R.I.M. provides **a step by step process that translates vision into business deliverables while meeting project schedules and budgets.**

What is R.I.M.?

R.I.M. is a comprehensive toolkit addressing every phase of the project. It is packaged in 17 modules with a collection of over 80 tools, benchmarks, matrices, flowcharts, project plans and strategic instruments.

R.I.M. Highlights

- R.I.M. is a **repeatable** process fostering constant improvement and **momentum** through each project
- Provides a complete toolset addressing the entire project life cycle
- Compression of multiple milestones into several strategic quality steps
- Reduction in rework and project timelines
- Products delivered faster, at a higher quality, and at **one-third the cost of traditional implementations**



The Four Major Components of the Total Implementation Process:

1. Planning
2. Building Block Theory
(R.R.D., Fit Analysis, Building the System)
3. Testing and Quality Gates
4. Production & Client Deployment

* Note: The Department Training is also structured based on these four stages.

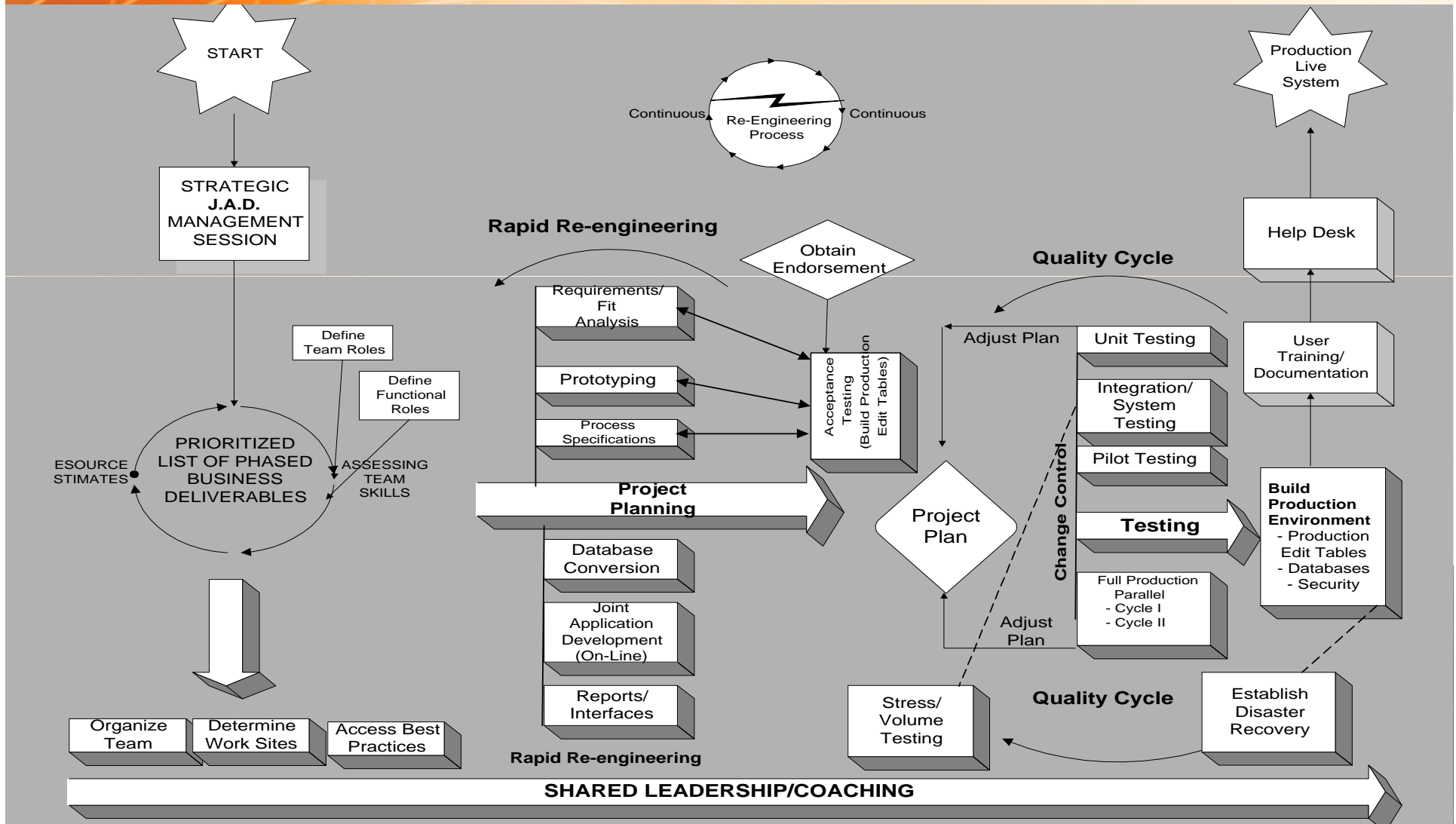
The Rapid Implementation Methodology (R.I.M.)

- Time compression - accomplishing multiple steps simultaneously
- Comprehensive toolset for quality testing and benchmarking/performance measurement
- Built-in process for partnering with the Business Community
- Built-in quality control at strategic integration points
- Highly motivated, self-directed project teams as a result of maximum knowledge transfer

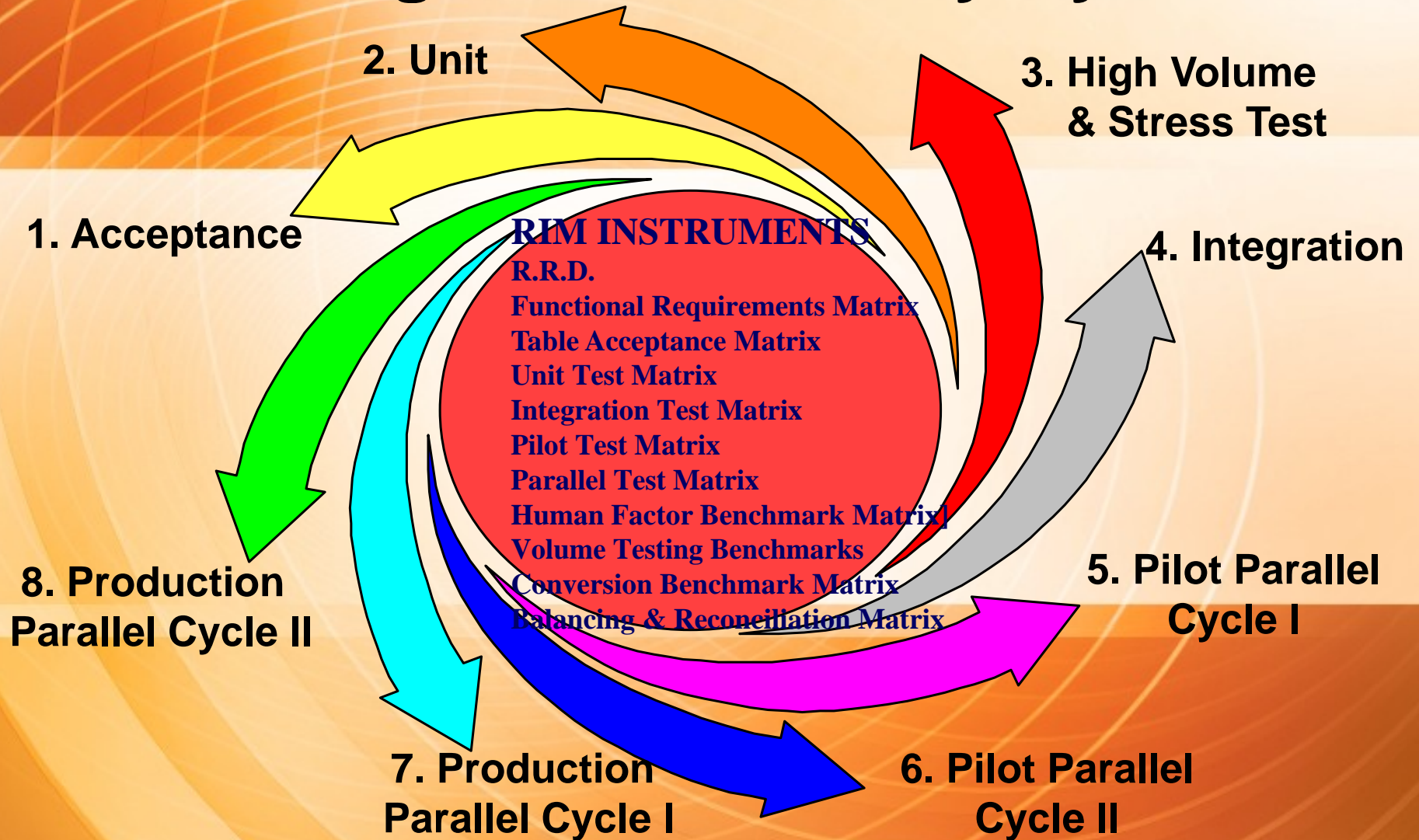
← **Leadership** →



RAPID IMPLEMENTATION METHODOLOGY



Testing and the Quality Cycle



*Note: Disaster Recovery will be discussed in further detail in 4th stage.

Figure 18A



Where we are today...

"There's a lot going on right now in this market,... everyone is trying to find ways to compete ... Desktop scheduling is still a piece of the picture, but perhaps it's no longer the biggest piece."

*Jim Johnson, chairman
The Standish Group*



"The project office was trendy a couple of years ago. Those who used it during Y2K found that it was also pretty effective."

*Matt Light,
research director
Gartner Group*

Today, industry analysts have identified a number of emerging trends in the project management space. Perhaps the most striking is the re-emergence of the "project office" model.

Software Magazine

Gartner Group has predicted that IS organizations that establish appropriate project management standards, and set up project offices to administer them, will experience half the major project cost overruns, delays, and cancellations of those who do not.

"Winning the race in today's intensely competitive marketplace demands we immediately address **Speed**, (time to market) **Quality** and **Performance**. This requires strong leadership, direction and tools."

M.A. McIlraith

MAXIMUM POTENTIAL INTERNATIONAL

NOW

**Ask Yourself
How do We
Jump-Start
R.I.M. Portfolio
Dashboard**

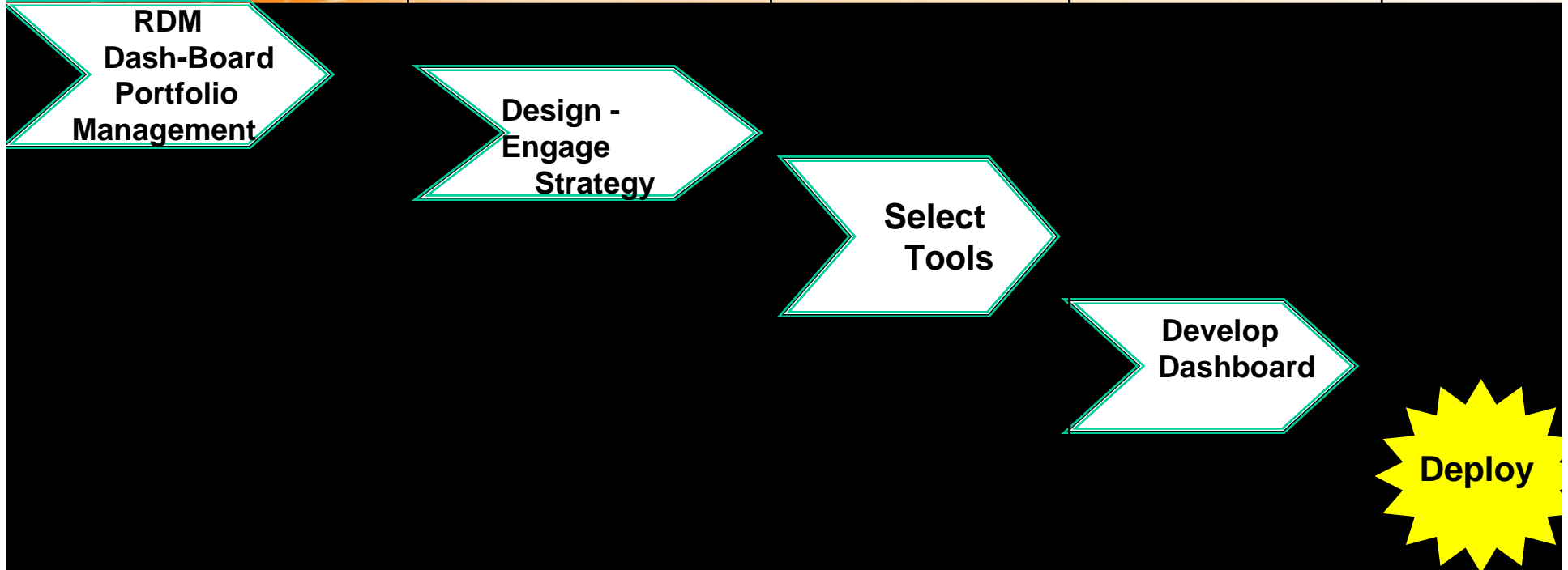


Project Chart presented at IHRIM

IHRIM Pre-Conference Education

BioMed Moving Forward Strategy
Rapid Delivery Model (R.D.M.)
Portfolio Dash-Board

Deliver: 90 days



RDM Dashboard
Foundation

Design

Build Dash Boards

RDM Tool-Kit

Roll-Out

R.D.M. Dashboard Strategy

See:

Vision Map &

Shared Vision – Shared Leadership – Shared Success

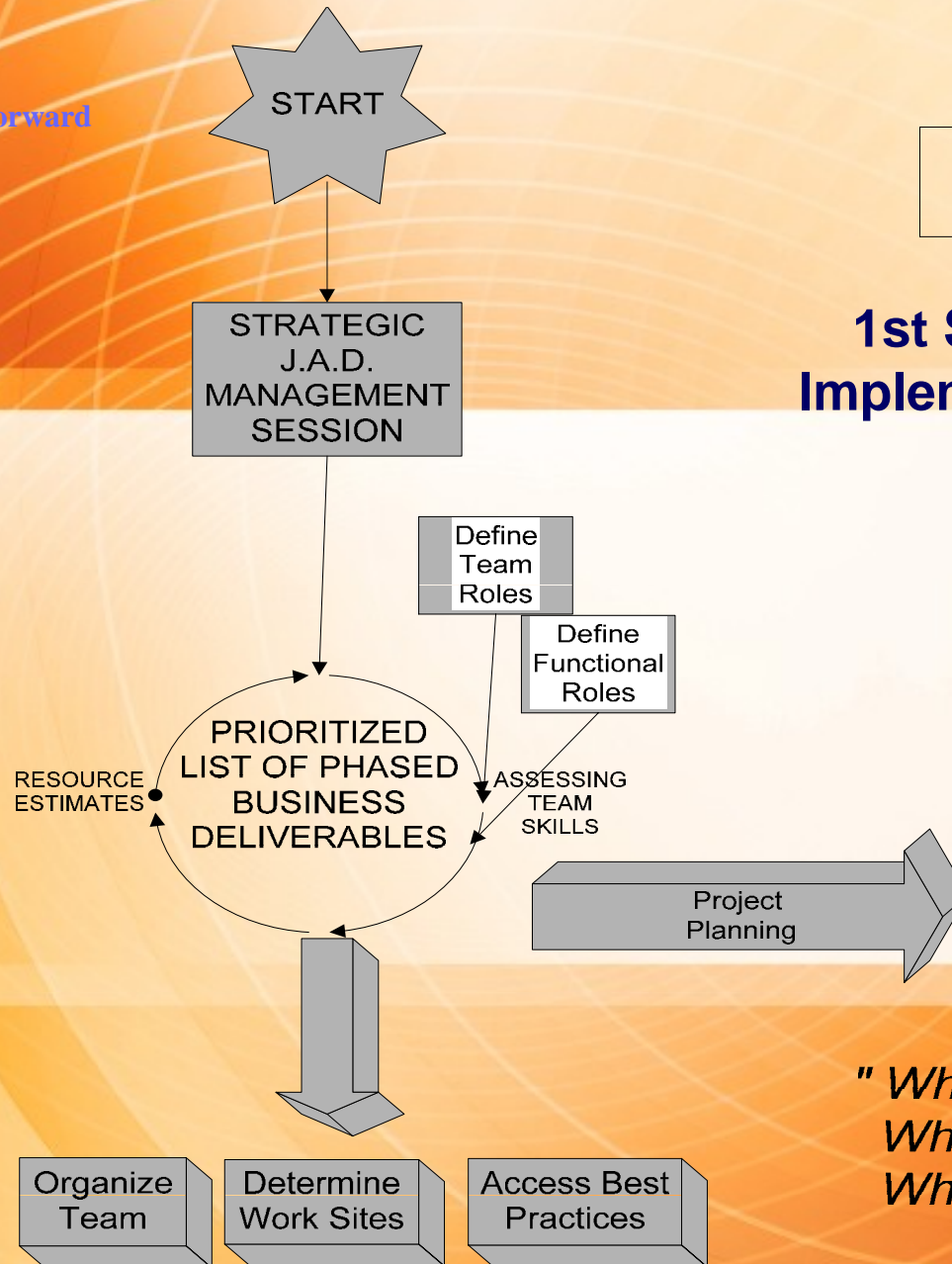
Rapid Re-engineering Hi-Level Design Document

** Delivered in Detailed Workshop*

*Moving Forward

PLANNING

1st Stage of the R.D.M. Implementation Dashboard

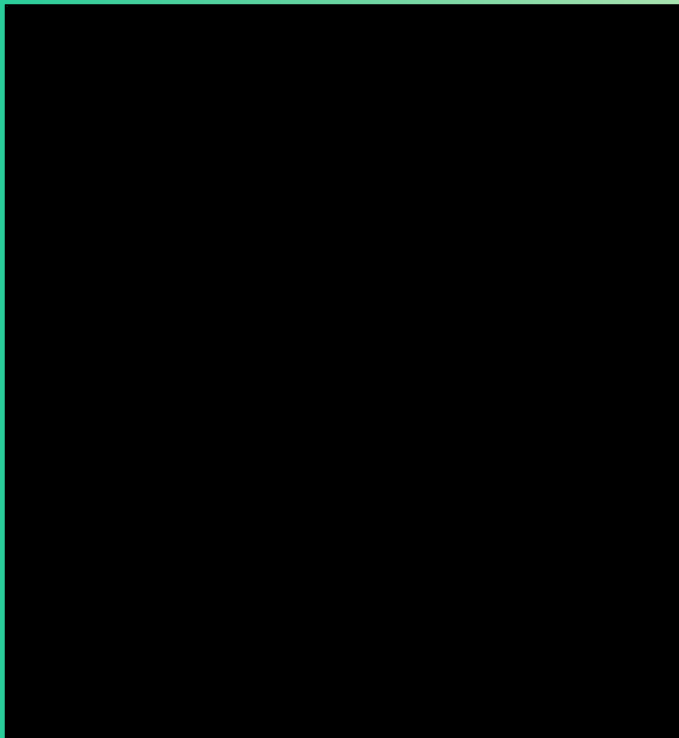


*" What is the benefit?
What is the impact?
Why are we doing this?"*

RIM Dash-Board
Moving Forward Strategy - Start

Executive Joint Application Design

Executive JAD



First Quality Gate

- ◆ Group Brainstorming Session
- ◆ Identify Client Organizational Goals & Specific Objectives
 - * Strategic Measurement Matrix
 - * Project Objective Matrix
- ◆ Create Shared Project Vision
- ◆ Create Mutually Agreed Upon Expectations

RIM Discipline - JAD

R.D.M. Dashboard

Moving Forward

Strategic Measurement Matrix

Future: Lead the Way

OBJECTIVE	STRATEGY	SUPPORTING INITIATIVES	IMPACT	RETURN ON INVESTMENT
<ul style="list-style-type: none"> •Embrace RIM Position as a Global Leadership Tool for Portfolio & Leadership Management. •Consistency and strategy with effective measurement tools. •Rapid Delivery Model (R.I.M) Web Portfolio Management for System & Implementation Lifecycle. •Portfolio Management for Leadership. •Blended, Portfolio for Project Management, ROI, Leadership & The Maturity Model. 	<ul style="list-style-type: none"> •Integrate RIM methodology •Use low hanging fruit from RDM. •Position for Merger into IT. •Leadership Training for PM's (R.E.M.) 	<p>RIM</p> <p>Phase 2 Client Role-out</p> <p>RIM\REM Leadership</p>	<ul style="list-style-type: none"> •Positioned for Growth. •Reduced costs •“Web of Influence” Management and Sponsors. 	<p>Estimated 5x ROI, in first year of use.</p> <p>Successful Merger or Independence of Department within the IT Organization.</p>

RIM Dashboard Project Objective Matrix

New: Project Objective Matrix

PROJECT OBJECTIVE	DETAIL	MEASUREMENT	TARGET COMPLETION DATE
<p>Build Dashboard Continue to enhance methodology that is global & scalable</p>	<p>Educate the Client in Base RDM; Sponsors, Executives and SME's.</p> <p>Next: Provide a simple, easy to use, web tool for Project Teams, IT Management, Sponsors and PM's. Integrate and build; leveraging the base foundation of RDM templates and processes.</p>	<p>Project Managers can manage more projects concurrently, larger projects while keeping the cost down and enhance the quality.</p> <p>PM's will be the internal Consulting Brain-Trust for the Corporation; cross all Global Business Units</p>	<p>7/07</p>

RIM Project Objective Matrix Results

R.I.M. Dash-Board Tools

*Future – Moving Forward

The Tools to Include and Add in Dash-board

- Strategic Measurement Matrix
- Project Measurement Matrix
- Process Matrix
- Rapid Re-engineering Discipline (RRD)
- Unit Test Matrix
- Project Planning Instruments
- Risk, Assumption, SOW
- Roles/Responsibility Matrixes & Job Descriptions
- The Quality & Performance Instruments
- New ROI models
- New Leadership Dash-board
- New Benchmark Tools
- New Sponsor Dash-board

Moving Forward Strategy Notes

➤ During Design Phase

Evaluate 2 – 3 Vendors (For Best of Breed Knowledge & To Provide the Core Team with Creativity)
Potentially PeopleSoft and Microsoft
(Core Team - no more than 4 internal employees)

*Our Vision & Design is beyond any Product available on the Market today

*Potentially utilize Company Tools owned, ie.

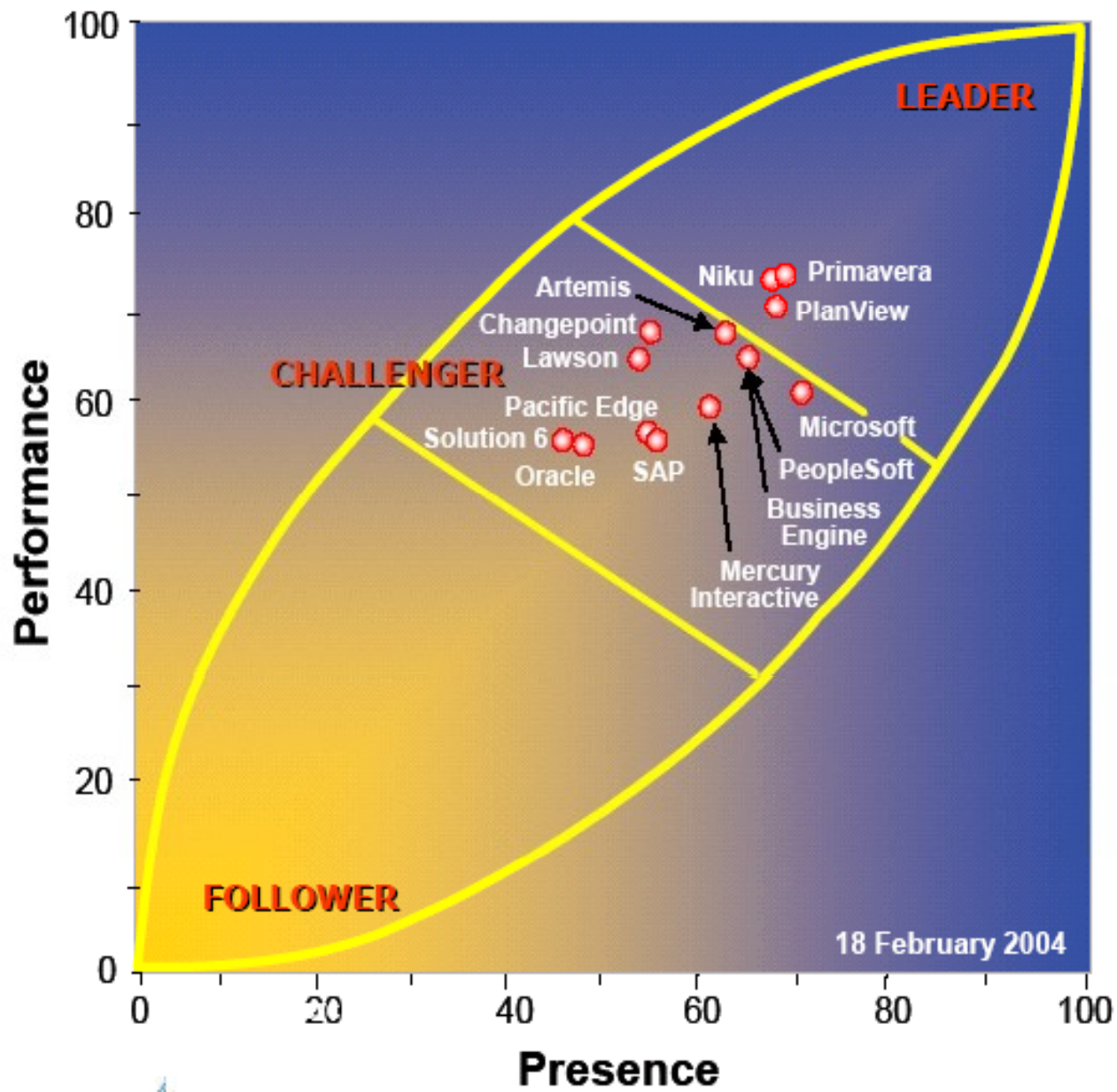
Mopps (?), InfoPath, Shared Point Services, Visio, PS with Workflow and Trigger capability

We may have to be build API (Application Program Interfaces), if not delivered

**The Following are Magic Quadrant Vendors by Gartner*

Moving Forward MetaForum* Market Summary

This market includes products that coordinate, manage, and prioritize project and program portfolios and related resources, linking them in a single repository with appropriate views to categorize, assess the value/risk of, and score current and future projects in the context of business imperatives (financials, resources, competitive position, etc.).



*Magic Quadrant= from Meta \Gartner

MetaForum Market Summary

➤ Leaders:

- Primavera, Niku, and PlanView
- Even the leaders are considered “emerging” with regard to maturity

➤ Challengers:

- ERP: Lawson, PeopleSoft
- Standalone: Pacific Edge, Business Engine, and Artemis.
- Microsoft: Project Server 2003, (MS Just Released MOPPS (1/07)

➤ Followers:

- SAP and Oracle
- Resources and commitment to PPM
- No mature products nor a strong user presence
- These vendors will improve

Moving Forward

R.D.M./ Dash-board Achieves

- A Maturity Model in-line with Company Growth
- Enhance and Speed Decision Making
- Lower Project Costs
- Increased Potential to Seize Market Opportunities
- Earlier Achievement of Business Benefits
- Position the Department for IT Merger
- Engages the Global Sponsors & Business Communities
- Foster Cross Business Unit Collaboration

Benefits of R.I.M. Dashboard

- 1. Lower implementation costs**
- 2. Faster & Consistent implementation**
- 3. Quality product to customer**
- 4. Ownership & accountability**
- 5. Pro-Active for future Expansion**
- 6. Customers, Partner using the Dash-board**
- 7. Information available immediately to Management Team – enhanced decisions**

Benefits of R.I.M. for Clients

- 8. Scalable & Repeatable process**
- 9. Teams are empowered - minimal dependency on consultants**
- 10. Maximize on investment while minimizing risk with the Dash-board**
- 11. Customer expectations (project deliverables, timeframe, resources and costs) are realistic and set up-front**
- 12. Customers are “going live” faster**

Where Are We Going!

Leverage R.I.M.

Build Dash-Board To:

- Maximize The Company Collaboration
- Pro-Active in Positioning for the Future
- We must provide our Teams, Executives and Sponsors with Outstanding Tools

In Summary

Next Step:

Execute JAD with Management, then Select Core Team.

JAD's are a high level, client oriented method to:

- develop a shared project strategy**
- establish mutual relationship expectations**

JAD's deliver more than outputs. They source the creation of:

- a common vision**
- a common vocabulary and,**
- a commitment to the resulting strategy**
- a long-term Clients for Life pro-active partnership**
- a path to enhance clients Human Capital & Business (revenues)**
- a partnership alignment**

R.D.M. /JAD Achieves

- Early and Upfront Buy In
- Enhanced Pace of Delivery
- Lower Costs
- Increased Potential to Seize Market Opportunities
- Earlier Achievement of Business Benefits

Minimize Your Risk while Maximizing Your Investment

Positioning The Building Blocks:

Company

Department

Executive Team

NOW

**Ask Yourself
When do We
Jump-Start
R.I.M. Dashboard**

Rapid Delivery Methodology

Mission Statement

We will enhance our maturity model for project implementation by utilization of consistent processes across the organization. We optimize human resources and technology in order to deliver projects with lower cost and higher quality. To engage and collaborate with the business community in order to meet or exceed expectations.

Lead with
Energy,

Attitude &
Passion

Leap



Medtronic
Alleviating Pain • Restoring Health • Extending Life

- Appendix Presented at IHRIM



Modify Shared Pa

- Project Documents
- Agendas/Minutes
- Project Plans
- Project Status
- Documents
- Issues
- Lists
- Contacts
- Project Calendar
- Discussions
- Surveys
- Links
- A-Z Index
- About this Site

Welcome ▼

Welcome to the HR Systems Rapid Implementation Methodology (RIM) Website!
Here you will find valuable documentation and templates for your use to help you become more effective and efficient in your work.



Announcements ▼

Documents ▼

Type	Name	Description	Modified By
Folder	RIM Module 18 - Shared Team Leadership		Toni Walton
Folder	RIM Module 17 - Communications Initiatives		Toni Walton
Folder	RIM Module 16 - Rapid Training Development and Delivery		Toni Walton
Folder	RIM Module 15 - Back-ups and Disaster Recovery		Toni Walton
Folder	RIM Module 14 - Production Operations and Environment		Toni Walton
Folder	RIM Module 13 - Database Environments		Toni Walton
Folder	RIM Module 12 - Conversion		Toni Walton
Folder	RIM Module 11 - Testing and Quality Gates		Toni Walton
Folder	RIM Module 10 - Reports and Interfaces		Toni Walton
Folder	RIM Module 9 - Joint Application Design and Development		Toni Walton
Folder	RIM Module 8 - Rapid Re-Engineering Discipline		Toni Walton
Folder	RIM Module 7 - Risk Analysis		Toni Walton
Folder	RIM Module 6 - Project Planning		Toni Walton
Folder	RIM Module 5 - Project Team Tools		Toni Walton
Folder	RIM Module 4 - Project and Team Performance Controls		Toni Walton
Folder	RIM Module 3 - Strategic Planning		Toni Walton
Folder	RIM Module 2 - Overview and Processes		Toni Walton
Folder	RIM Module 1 - Introduction		Toni Walton
Folder	RIM Forward and Table of Contents		Toni Walton

▢ Add new document

Project Status

Type	Name	Modified By
Document	Status Report Template NEW	Toni Walt

▢ Add new document


Issues

Type	Name	Modified By
Document	Open Issues Log NEW	Toni Walton

▢ Add new document

The following is the screen that displays when someone clicks on the Module 4 folder. The Module 4 text document and all the various templates and figures for Module 4 display as well as a section to show who has checked out the document.

Home Documents and Lists Create Site Settings Help































































 Rapid Implementation Methodology
Documents
 RIM Module 4 - Project and Team Performance Controls

Select a View
 All Documents
 Explorer View

Actions
 Alert me
 Export to spreadsheet
 Modify settings and columns

Share a document with the team by adding it to this document library.

[New Document](#) | [Upload Document](#) | [Up](#) | [New Folder](#) | [Filter](#)

Type	Name	Description	Modified	Modified By	Checked Out To
	Module04	Module 4	4/2/2007 5:40 PM	 Toni Walton	
	RFIG04A	Figure 4A	4/3/2007 4:19 PM	 Toni Walton	
	RFIG04B	Figure 4B	4/3/2007 4:20 PM	 Toni Walton	
	RFIG04C	Figure 4C	4/3/2007 4:20 PM	 Toni Walton	
	RFIG04D	Figure 4D	4/3/2007 4:20 PM	 Toni Walton	
	RFIG04E	Figure 4E	4/3/2007 4:20 PM	 Toni Walton	
	RFIG04F	Figure 4F	4/3/2007 4:20 PM	 Toni Walton	
	RFIG04G	Figure 4G	4/3/2007 4:20 PM	 Toni Walton	
	RFIG04H	Figure 4H	4/3/2007 4:21 PM	 Toni Walton	
	RFIG04I	Figure 4I	4/3/2007 4:21 PM	 Toni Walton	
	RFIG04J	Figure 4J	4/3/2007 4:21 PM	 Toni Walton	
	RFIG04K	Figure 4K	4/3/2007 4:21 PM	 Toni Walton	
	RFIG04L	Figure 4L	4/3/2007 4:21 PM	 Toni Walton	
	RFIG04M1	Figure 4M1	4/3/2007 4:21 PM	 Toni Walton	
	RFIG04M2	Figure 4M2	4/3/2007 4:21 PM	 Toni Walton	
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	RFIG04P	Figure 4P	4/3/2007 4:22 PM	 Toni Walton	
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	RFIG04P2	Figure 4P2	4/3/2007 4:22 PM	 Toni Walton	
	RFIG04Q	Figure 4Q	4/3/2007 4:22 PM	 Toni Walton	
	RFIG04R	Figure 4R	4/3/2007 4:23 PM	 Toni Walton	
	RFIG04S	Figure 4S	4/3/2007 4:23 PM	 Toni Walton	
	RFIG04T	Figure 4T	4/3/2007 4:23 PM	 Toni Walton	
	RFIG04U	Figure 4U	4/3/2007 4:23 PM	 Toni Walton	
	RFIG04V	Figure 4V	4/3/2007 4:23 PM	 Toni Walton	
	RFIG04W	Figure 4W	4/3/2007 4:23 PM	 Toni Walton	
	RFIG04X	Figure 4X	4/3/2007 4:24 PM	 Toni Walton	
	RFIG04Y	Figure 4Y	4/3/2007 4:24 PM	 Toni Walton	
	RFIG04Z	Figure 4Z	4/3/2007 4:24 PM	 Toni Walton	
	RFIG04ZZ	Figure 4ZZ	4/3/2007 4:24 PM	 Toni Walton	

Documents related to Project

The screenshot shows a web browser window displaying a SharePoint document library. The browser's address bar shows the URL: `http://projectdemo/sites/sample_p10/Shared%20Documents/Forms/AllItems.aspx`. The browser's search bar contains the word "Google". The browser's toolbar includes icons for home, RSS, print, page, and tools.

The SharePoint interface has a blue navigation bar with the following links: [Home](#), [Documents and Lists](#), [Create](#), [Site Settings](#), and [Help](#). Below the navigation bar, the page title is "Accounts Receivable Mods for Sarbannes Oxley" and the main heading is "Shared Documents". A search box is located on the right side of the page.

On the left side, there is a "Select a View" section with "All Documents" selected. Below it, there is an "Explorer View" section. In the "Actions" section, there are several options: Alert me, Export to spreadsheet, Modify settings and columns, and Synchronize with Project Server.

The main content area displays a message: "Share a document with the team by adding it to this document library." Below this message, there is a toolbar with the following options: [New Document](#), [Upload Document](#), [New Folder](#), [Filter](#), [Edit in Datasheet](#), and [All Document Libraries](#).

The document library contains the following documents:

Type	Name	Modified	Owner	Status	Modified By	Checked Out To
	Module02 !NEW	3/6/2007 10:23 AM		Draft		
	Module03 !NEW	3/6/2007 10:23 AM		Draft		
	Module08 !NEW	3/6/2007 10:23 AM		Draft		
	RRD template !NEW	3/6/2007 10:24 AM		Draft		

Edit directly from the project site

RRD template.doc (Read-Only) - Microsoft Word

File Edit View Insert Format Tools Table Window Help

Type a question for help

Title Times New Roman 14 **B** *I* U

1 2 3 4 5 6 7

Business Procedures
Meeting Business Objectives through Profit & Performance
****RAPID RE-ENGINEERING FORM****

1. Define Business Objectives

SHARED VISION – SHARED LEADERSHIP – SHARED SUCCESS

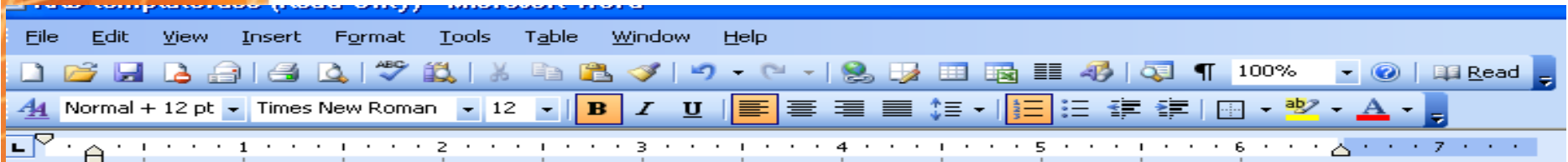
**You may have one or many Processing Logic Tables (below) per (the above) Business Objective.*

2. Business Processing Logic

Specific details of how the function will be executed. If you have documentation on how this procedure will process, attach a copy of the documentation. You may include a Data Flow Diagram.

Process/Step\Milestone Question	Triggers\Events	Rule or Result	Work Flow (Automatically)	Comments

RIM Guidance online



- **Examples:**

1. Letter	2. Workflow	3. Customer	4. Trigger	5. Prospect
6. Point - incentive	7. Contact ID	8. Title and Prof. Codes		

***All Tables Developed should be company wide or Business Unit Specific.**

2 tiers are required as some B.U. 's may share the same table, ie... such as letter code table, while another B.U. may have a unique table all together---Another example could be the Workflow Table; which will vary by B.U.

- **Panels:**

List Panel Name. Attach copies of new panels (web pages).

1. COI	2.	3.	4.	5.
6.	7.	8.	9.	10.

Page Break

Elements Listing:

Attach Element List per screen (identifying the Field Name, Field Type, Length number of Decimal places, and indicate if the field is required.

- **Edits:**

Identify edits by element, including the specific table.

- **Reports\Analytics:**

When identifying reports seriously consider reduction of paper. The system should provide you with on-line analytics. List the selection criteria, fields, sorts, totals, calculations and frequency for each report or on-line analytic. Provide a sample layout of the reports. Any trend analysis reports, key performance indicators and metrics, sales performance analysis reports, Bonus referrals, graphs, charts, etc.,

All Reports will be on-line	

Identify Issues

Issues - Windows Internet Explorer

http://projectdemo/sites/sample_p10/Lists/Issues/AllItems.aspx

Home Documents and Lists Create Site Settings Help

Accounts Receivable Mods for Sarbannes Oxley
Issues

Select a View

- All Issues
- All Issues Assigned to Me
- All Issues Owned by Me
- All Issues Opened by Me
- All Active Issues
- All Closed Issues
- All Postponed Issues

Actions

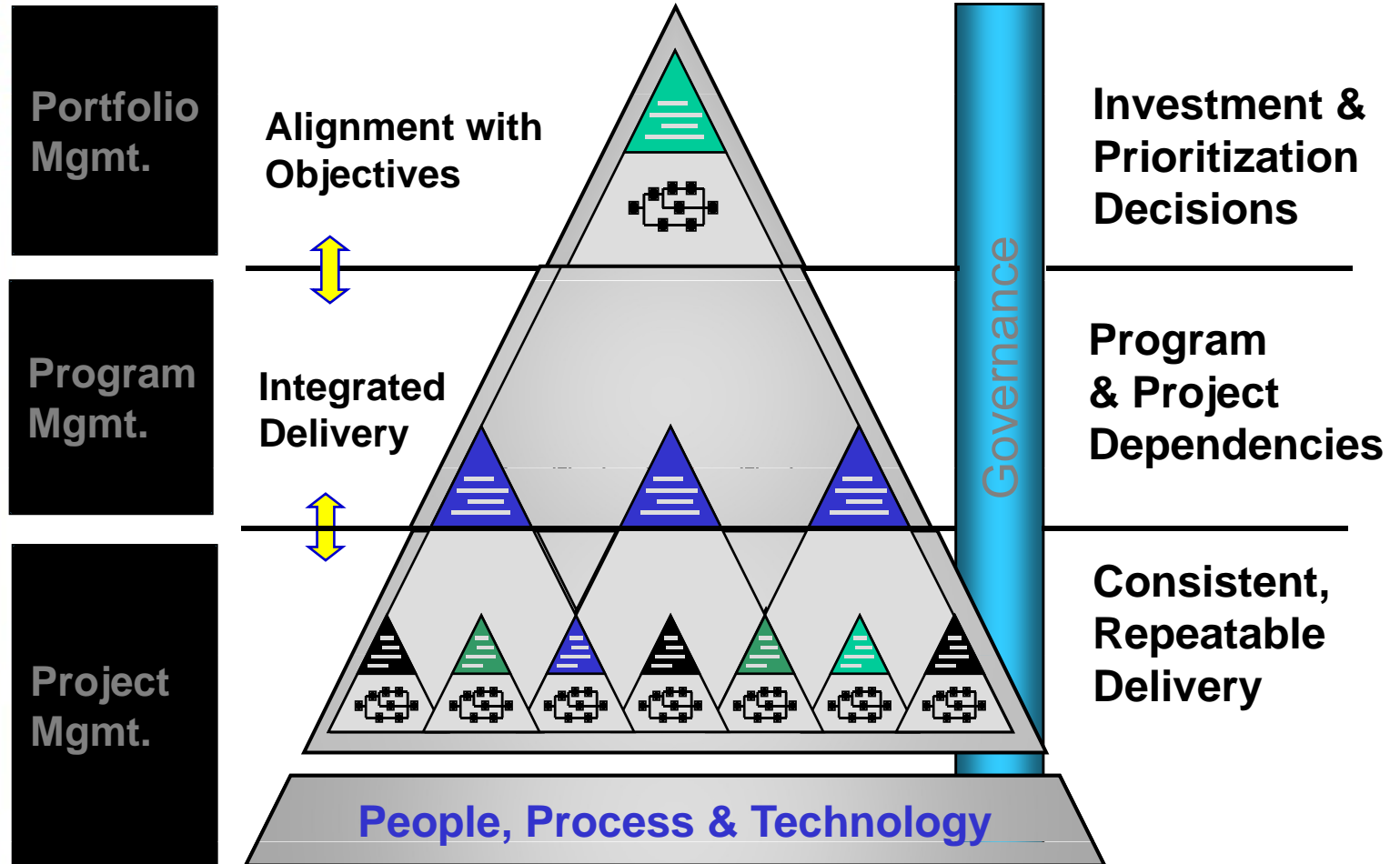
- View reports
- Alert me
- Export to spreadsheet
- Modify settings and columns
- Synchronize with Project Server

Use the Issues list to track issues that have occurred in your project.

New Issue | Filter | Edit in Datasheet

Issue ID	Title	Assigned To	Status	Priority	Category	Due Date
Count = 1						
1	Procurement Delay	epkadmin	(1) Active	(1) High	(3) Category3	3/24/2006 12:00 AM

Relationship of project, program, portfolio management

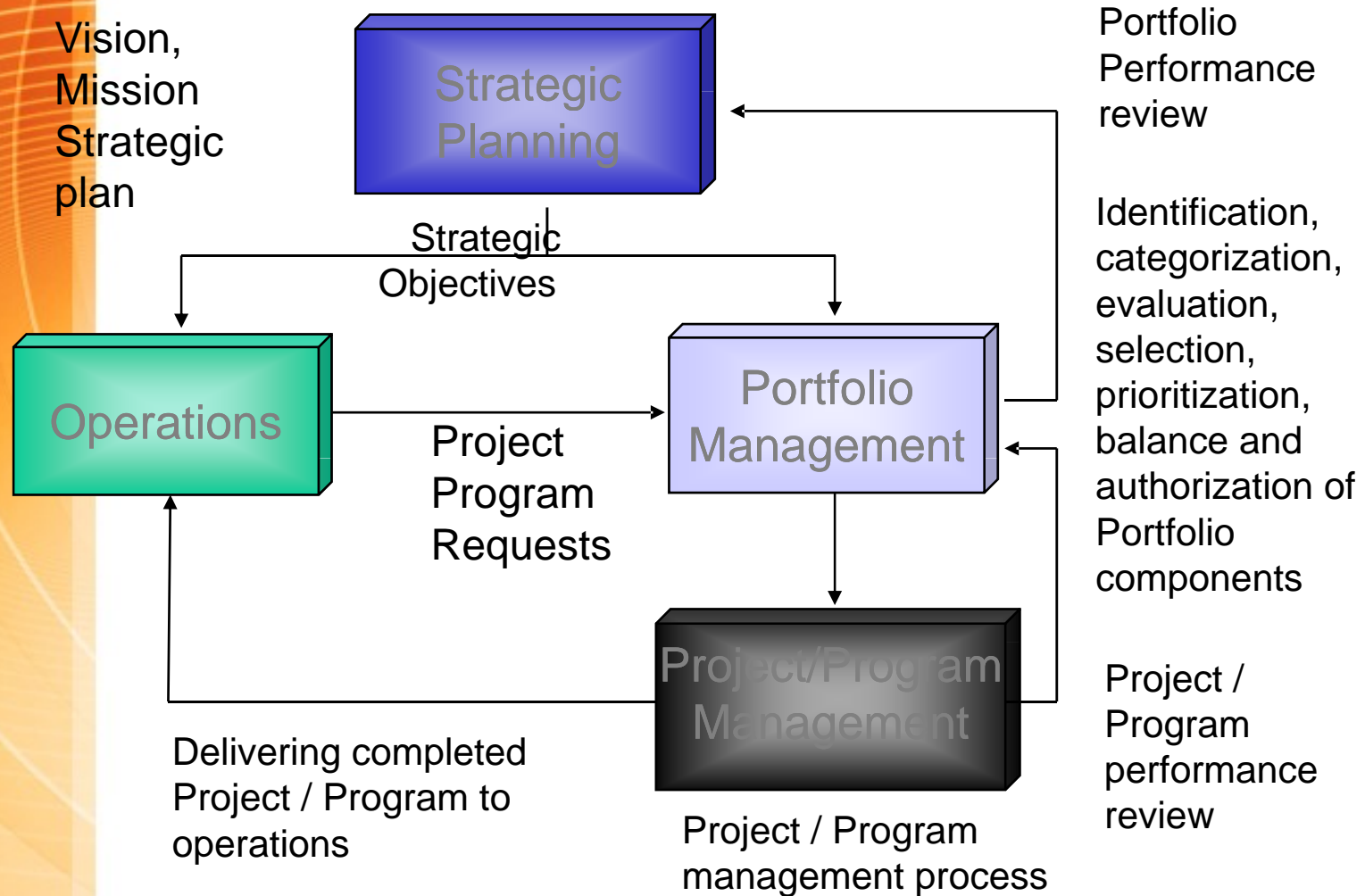


Portfolio Management

...is a process ...something we do, to answer these questions like:

- Which projects best support the corporate strategy?
- Where should the resources from a project nearing completion best be allocated?
- Which programs, projects, and infrastructure support efforts are currently behind schedule, over budget, and why?
- Do we have enough of the right people to successfully take on a key initiative?
- How is the resource plan impacted when a new project is added to the portfolio?

Portfolio Management Process

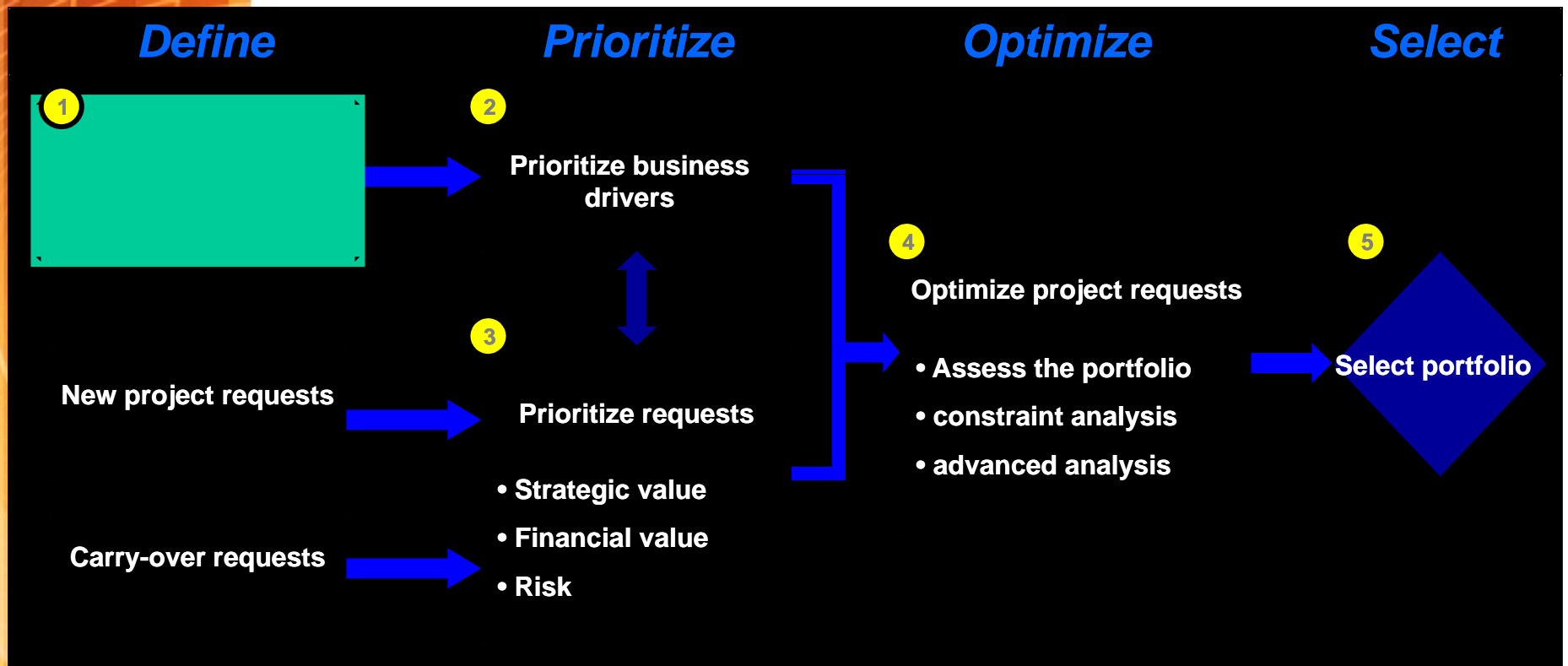


Source: PMI draft Portfolio Management Standard

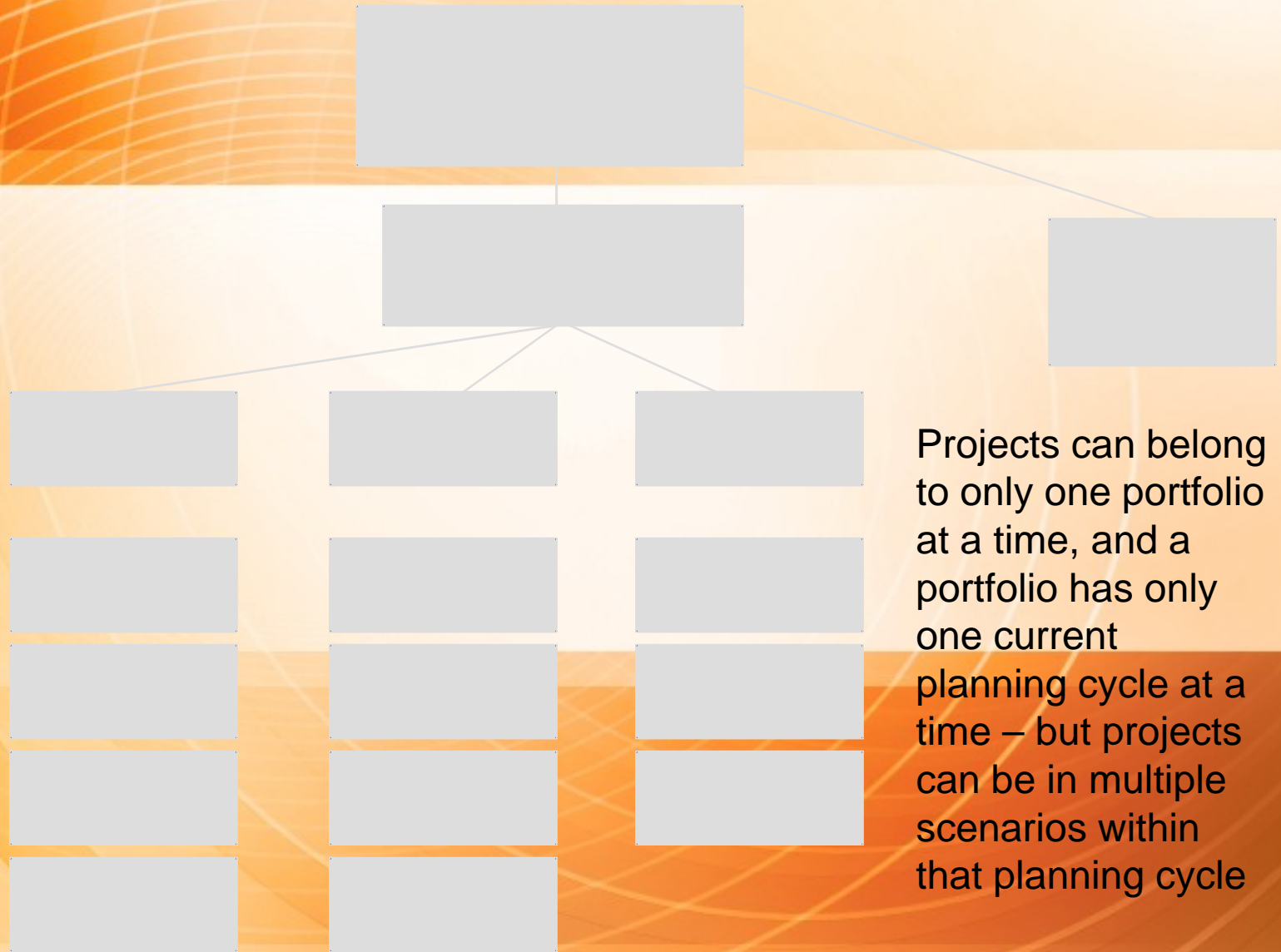
Embedded Portfolio Management best practices

Business alignment framework

The Business Alignment Framework ensures a rational rather than emotional approach to project selection'



Concept Mapping: Portfolios, Planning Cycles, Scenarios



Projects can belong to only one portfolio at a time, and a portfolio has only one current planning cycle at a time – but projects can be in multiple scenarios within that planning cycle

Benefits

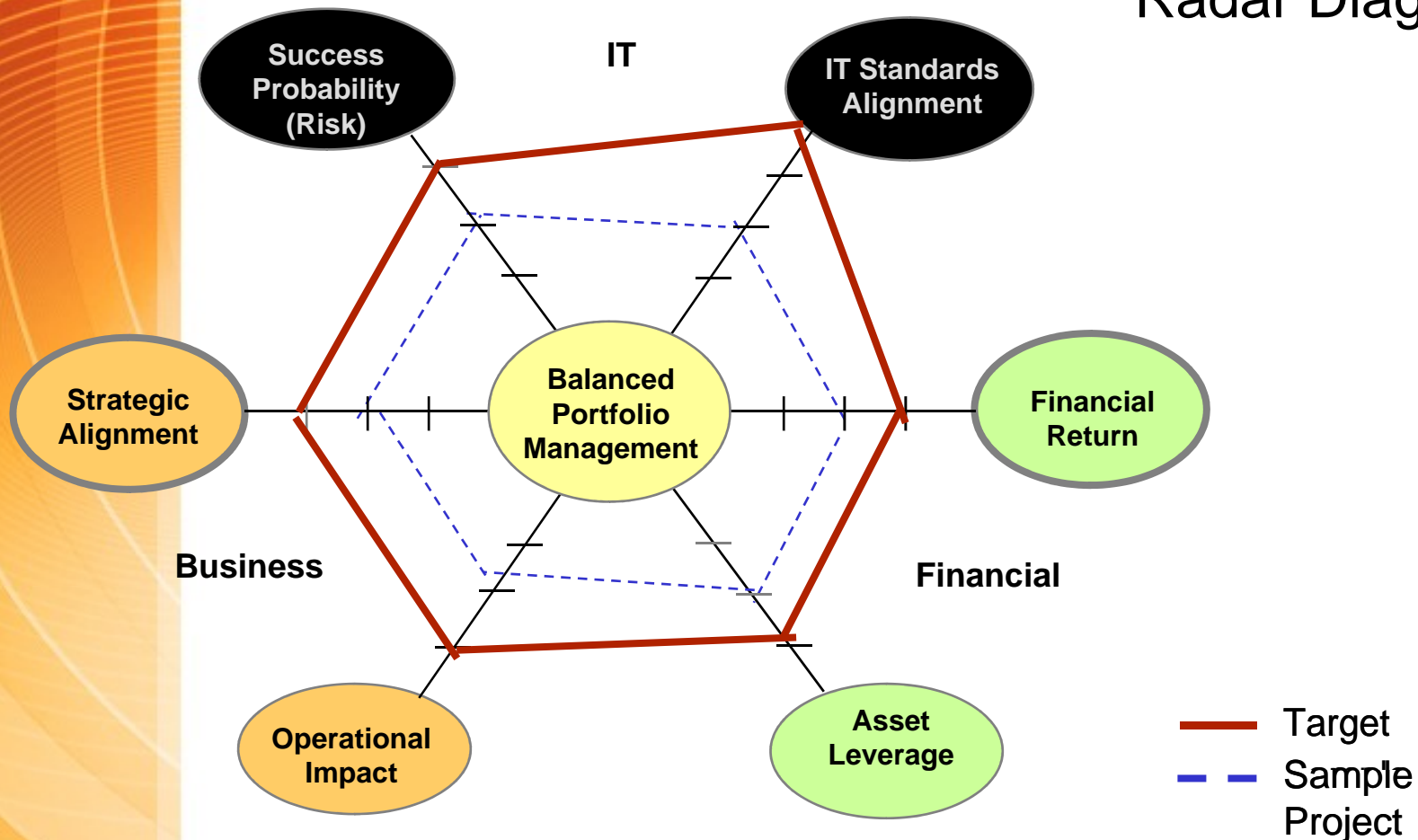
- Quickly evaluate capital requests to identify high value (strategic and/or financial)
- Increase competitive advantage by executing on real-time strategy changes
- Reduce risk by planning for “What If” scenarios
- Speed the planning process with automated workflow for the planning & approval process

Sample Project Scoring Model

SCORING MODEL EXAMPLE								
List of Criteria	Weight	Evaluation			Score	Total		
		Low	Medium	High				
Financial Return	20%	0	5	10	10	2	Value	
Asset Leverage	20%	0	5	10	10	2		
Operational Impact	10%	0	5	10	5	0.5		
Strategic Alignment	15%	0	5	10	10	1.5		
IT Standards Alignment	10%	0	5	10	5	0.5		
Project Complexity	10%	0	5	10	10	-1	Risk	
Risk of Failure	15%	0	5	10	5	-0.75		
	100%	Value					6.50	
		Risk					-1.75	
Total Score						4.75		

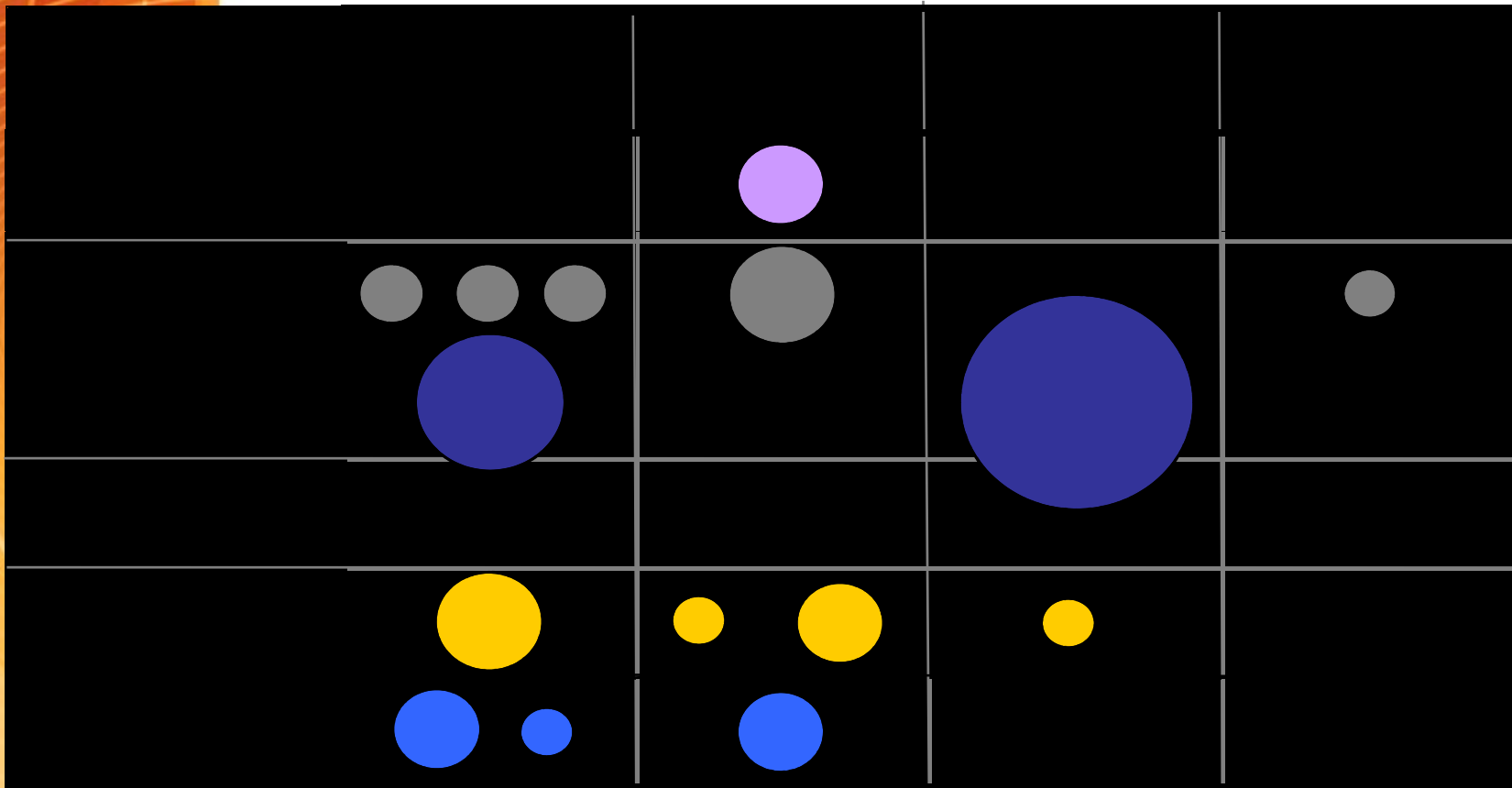
Balanced Portfolio Management Model – weighted criteria showing targets for portfolio return

Radar Diagram



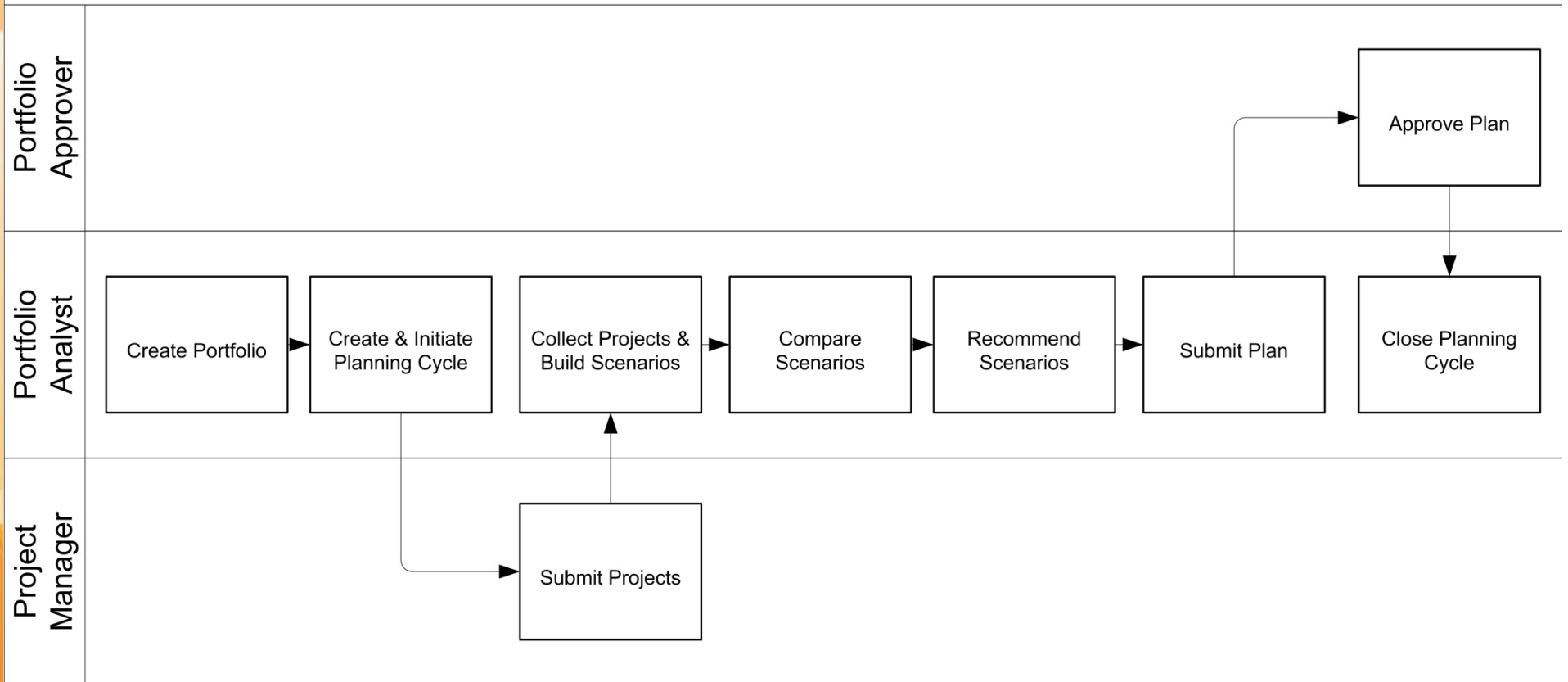
Source: PMI draft Portfolio Management Standard

Sample Project Portfolio Categorization



Portfolio Planning Flow

Oracle Project Portfolio Planning - Flow



***Sample Dashboards
presented at IHRIM**


Create Portfolio


Create Portfolio

*Indicates required field

* Portfolio Name

* Portfolio Type

* Owner 

Start Organization 

Description

Portfolio Access can be controlled, and stakeholders given visibility

Planning Cycle History

Portfolio Access

Name	Role	Organization	Job	Effective From	Effective To	Delete
Amy Marlin	Financial Analyst 	Enterprise Apps	Financial Analyst	28-Feb-2005 	20-Oct-2005 	
Joe		Enterprise Apps	CEO	28-Feb-2005 		
David Johnson		Supply Chain	Project Manager	28-Feb-2005 		

The History of all Planning Cycles and their approved scenarios retained on each portfolio

Define Investment Criteria

Investment Criteria

[Expand All](#) | [Collapse All](#)

⊕ Investment Index

Focus	Objectives by Group	Weight			
	▼ Investment Index	100%			
	Financial Criteria	<input type="text" value="60%"/>			
⊕	▼ Strategic Criteria	40%			
⊕	▼ Market Fit	65%			
	High Tech Manufacturing	<input type="text" value="25%"/>	+		
	Healthcare and Pharmaceutical	<input type="text" value="10%"/>	+		
	Public Sector	<input type="text" value="20%"/>	+		
	Retail Sector	<input type="text" value="20%"/>	+		
	Process Industries	<input type="text" value="25%"/>	+		
⊕	▶ Technical Fit	<input type="text" value="10%"/>	+		
⊕	▶ Operational Impact	<input type="text" value="5%"/>	+		
⊕	▶ Risk		+		

“Market Fit” is a Strategic Group.
“High Tech Mfg” is a Strategic Objective in that group

- Weights must sum to 100% for:
- Financial vs. Strategic
 - All strategic groups
 - All objectives within each strategic group

Users may configure the set of strategic groups & objectives to meet their particular business needs

Create Planning Cycles

Investment Mix, Financial Options & Targets

Checklist Investment Criteria Basic Information **Financial Information** Distribution List

* Discount Rate %

* Funds Available USD

* Display Factor

(Enter divisor for displaying amounts.)

Users can define for each planning cycle target ranges for financial metrics including NPV, ROI, IRR and Payback Period

Targets

Financial Metrics	From	To
Net Present Value	<input type="text" value="5,000"/>	<input type="text" value="6,000"/>
Internal Rate of Return	<input type="text" value="11"/>	<input type="text" value="12"/>
Payback Period	<input type="text" value="40"/>	<input type="text" value="50"/>
Return on Investment	<input type="text" value="1.3"/>	<input type="text" value="1.5"/>

Users may also model planning assumptions

Investment Mix

Class Code	Description	Percentage of Funds
Operation	Operation	<input type="text" value="30"/>
Growth	Growth	<input type="text" value="20"/>
Foundation	Foundation	<input type="text" value="50"/>

Target mix for a portfolio will compare what-ifs in context of the goals

Create Planning Cycles

Set Weights and Targets for Investment Criteria

[Checklist](#) |
 [Investment Criteria](#) |
 [Basic Information](#) |
 [Financial Information](#) |
 [Distribution List](#)

Project Score Source Last Approved Score
 New Score

Project Score Scale

[Expand All](#) | [Collapse All](#)

Investment Index

Focus	Objectives by Group	Criteria	Weight Group	Objective	From	To
	▼ Investment Index	100%				
<input type="checkbox"/>	▼ Financial Criteria	<input type="text" value="40%"/>				
	Net Present Value Percentile					
<input type="checkbox"/>	▼ Strategic Criteria	<input type="text" value="60%"/>			<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	▼ Market Fit		<input type="text" value="65%"/>		<input type="text"/>	<input type="text"/>
	High Tech Manufacturing			<input type="text" value="25%"/>		
				<input type="text" value="10%"/>		
				<input type="text" value="20%"/>		
				<input type="text" value="20%"/>		
	Process Industries			<input type="text" value="25%"/>		
<input type="checkbox"/>	▶ Technical Fit		<input type="text" value="10%"/>		<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	▶ Operational Impact		<input type="text" value="5%"/>		<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	▶ Risk		<input type="text" value="20%"/>		<input type="text"/>	<input type="text"/>

Users can choose how to balance a portfolio's payback against its strategic alignment

Target scores allow organizations to define internal standards for portfolio & project assessment

Collect Projects & Build Scenarios

Score and Rank Projects

View Project Details

Cancel Apply

Project **ABC Financials Implementation**
 Funding Approval Status **Approved**

Funds Required **210,420**
 Recommended Funding Approval Status **Rejected**

Overview **Project Scorecard**

Project Score Scale: **1-10**

Recalculate

Expand All | Collapse All

Investment Index

Focus	Objectives by Group	Weight	Weighted Score	Submitted Score
	Investment Index			
	Financial Criteria	60%		
	Strategic Criteria	40%	8.1	
	Market Fit	65%	7.7	
	High Tech Manufacturing	25%		10
	Healthcare and Pharmaceutical	10%		8
	Public Sector	20%		10
	Retail Sector	20%		4
	Process Industries	25%		10
	Technical Fit	10%	10.0	
	Technical Risk - How will the complexity of the systems architecture and software design affect the development of the project?	80%		10
	Compatibility of Technical Architecture - How will proposed technology be integrated into existing systems?	20%		10

Drill down on project scores submitted by project managers and revise scores based on your judgment and comments. As a reviewer, you contribute to decision making by determining that "ABC Financials Implementation has a much lower technical fit and should be scored lower".

Collect Projects & Build Scenarios

Score and Rank Projects

View Project Details

Cancel Apply

Project **ABC Financials Implementation**
 Funding Approval Status **Approved**

Funds Required **210,420**
 Recommended Funding Approval Status **Rejected**

Overview Project Scorecard

Organization **Northeast-Apps**
 Project Type **Time & Materials**
 Status **Active**

Project Manager Marlin, Ms. Amy
 Start Date **26-Apr-2003**
 Finish Date **25-Sep-2003**

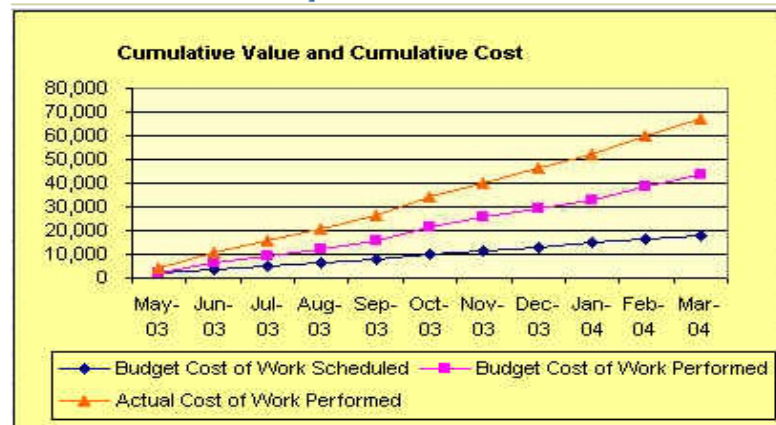
Description **This project is the first phase of an Oracle Apps R11i implementation, which was closed in August 2001 to install Financials and Human Resources/Payroll. This project comprises of the Oracle Financials Implementation and conversion of existing legacy system.**

Phases

Outline Number	Phase	Current Phase	Task Status	Progress Status	Score
1	Business Requirement Definition		In Progress	On Track	24-
2	Operation Analysis		In Progress	On Track	01-
3	Solution Design		In Progress	At Risk	08-
4	Build		Not Started		20-
5	Production		Not Started	At Risk	26-

Drill down on project details - view gives visibility on exact project details stored and tracked in the project management system, such as phases, earned value summary, and cost summary.

Earned Value Summary



Cost Summary

Indicator	Value	Value
Current Budget		
Pending Change Orders		
Revised Budget		
Total Cost	48,250	128,250
% Spent	96.67%	35.97%
% Complete	35%	37%
Committed Cost	500	750
Total Cost + Committed Cost	48,750	129,000
ETC	4,658	285,000
Forecast Cost(at completion)		413,340
Forecast Variance %		15.94%

Overview Project Scorecard

Collect Projects & Build Scenarios

Score and Rank Projects

Select Projects: Recommend Go | Add Projects

Select All | Select Recommend
Hold
Reject

Select	Project Name	Organization	Investment Category	Funding Approval Status							User Rank	Funds Required	Funds Allocation	Recommend Funding Approval Status	
<input type="checkbox"/>	CRM Wireless Access	Corporate IT	Enhance	Approved	1,439,300	719,650	8,220,000	1,548,434	1.08	21.52%	21	1	479,000	✓	Approved
<input type="checkbox"/>	Financial System Upgrade	Corporate IT	Operate	Approved	305,000	581,000	206,893						210,420		Rejected
<input type="checkbox"/>	Service Systems	Corporate IT	Operate	Propose	0	641,000	299,969								On Hold
<input type="checkbox"/>							470,696								Approved
<input type="checkbox"/>							413,848								Approved
<input type="checkbox"/>							909,318								Approved
<input type="checkbox"/>							179,242								Rejected
<input type="checkbox"/>							208,409								Approved
<input type="checkbox"/>	Order Management System	Corporate IT	Enhance	Approved	489,900	244,950	894,400	299,969							Approved

Perform prioritization based on financial measures - Return on Investment, Net Present Value, Payback Period, and Internal Rate of Return. These financial metrics are calculated based on the costs and benefits from the start of the Funding Period up through the Effective To Period.

“CRM Wireless Access” is an expensive on-going project in your portfolio, you already invested to the “sunk cost” calculation. At the same time, it has a high rate of return and will reach its breakeven point in 21 months, which is the shortest among all investments in your portfolio. Very strong financial justification to keep investing.

Compare Scenarios

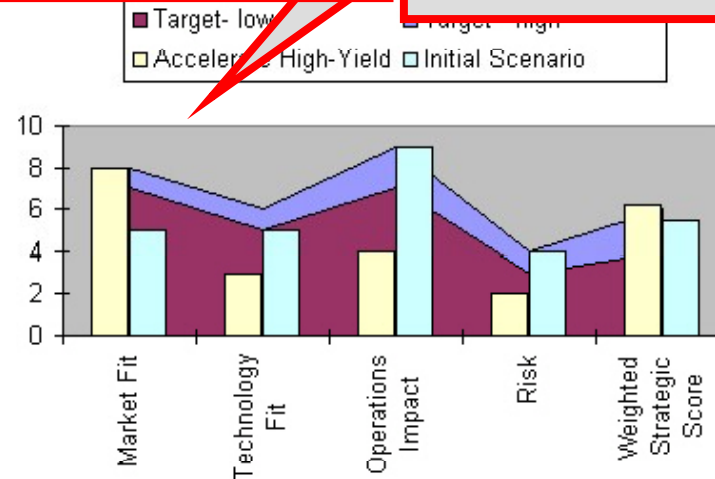
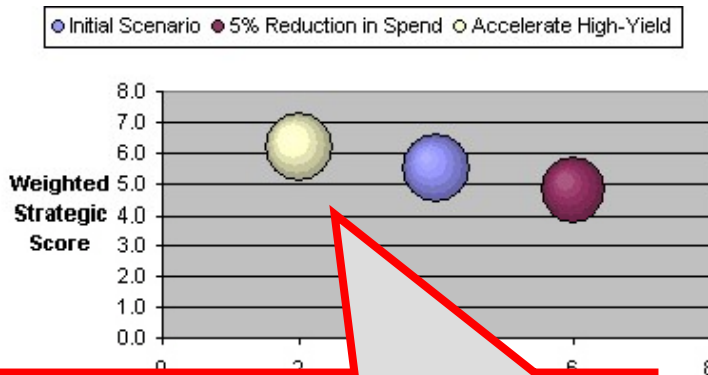
View Comparisons

Description: Replan for revised financial targets
 Portfolio Type: Global Departmental Portfolio

Scenario 1: Initial Scenario | Scenario 2: 5% Reduction in Spend | Scenario 3: Accelerate High-Yield

Analyze multiple scenarios to find the best fit, and to gain insight to how they measure up against goals & each other

Risk Analysis



Evaluate trade-offs to support decisions

Scenario	Strategic Score	Market Fit	Operations Impact	Risk	Technology Fit	Recommended
Initial Scenario	5.5	5	9	4	5	
5% Reduction in Spend	4.8	4	8	6	5	✓
Accelerate High-Yield	3.2	8	4	2	3	✓



How this inventory can help.

An actual situation

- An organization with \$750M in annual revenues; 5,000 employees, and 150 IT staff.
- Historically successful, but struggling to reduce costs to keep pace with economic downturn
- “Silo” culture where projects are “thrown over the wall to other departments”
- CEO hires a new CIO with a clear mandate to turn things around.



First Steps for CIO

- Initiates a 6-week review of current portfolio:
 - 200 “projects” on the original list
 - Not much data on each effort
 - Some projects used Project, other Excel, other Word
 - Many projects had no plans at all!
 - Low confidence in the list, even by those who created it
- Tells senior staff he wants them to recommend a standard set of measures and planning approach for all work
- Wants recommendations for retaining, consolidating or canceling projects.
- Also wants assessment and recommendations on organizational project management maturity

Cost Structure/Fiscal periods

Portfolio Item: Data Recovery Service

Category	UoM	Apr 05		May 05		Jun 05		Jul 05		Aug 05		Sep 05	
		Qty	Cost	Qty	Cost	Qty	Cost	Qty	Cost	Qty	Cost	Qty	Cost
Totals			39810		16560		19250		14960		18160		18600
Labor	hr	240	12960	240	12960	300	16200	240	12960	240	12960	300	16200
In House	hr	160	7680	160	7680	200	9600	160	7680	160	7680	200	9600
Sub Contract	hr	80	5280	80	5280	100	6600	80	5280	80	5280	100	6600
Hardware	units	8	1850	3	600	9	2050	5	1000	6	1200	7	1400
Data Center	units	3	600	3	600	4	800	5	1000	6	1200	7	1400
Servers	units	5	1250			5	1250						
Software			24000										
Server			24000										
Desktop													
Overhead			1000		1000		1000		1000		1000		1000
Contingency					2000						3000		

FTE Display
 %

Resource Planning Process

Resource Plan for: Dev Support of Help Desk

Save | Replace | Commitments | FTE

Team Member	Prior Hours	Jan	Feb	Mar	Apr	May	Jun	Jul
Angela Barbariol		100	100	125	100	100	125	100
Roger Lengel		100	100	125				
Jay Jamison					100	100	125	100

Add Candidates | Delete Rows | Commitments | Remaining (Hours)

Resource Candidates	1/2/2005	1/30/2005	2/27/2005	4/3/2005	5/1/2005	5/29/2005	7/3/2005
Angela Barbariol	20	60	75	60	60	75	60
Roger Lengel	60	60	75	60	-40	56	160
Elizabeth (Liz) Keyser	60	80	80	56	-14	50	-38
Florian Voss	0	80	200	100	160	66	-88
Jay Jamison	60	80	160	0	20	55	-20
Jim Stewart	80	-28	96	40	20	40	-200

Close

Early Warning of Resource Problems

Microsoft Office Project Web Access 2003 - projectdemo - Microsoft Internet Explorer

Address: http://projectdemo/sample/EPK/Portfolio.asp?_id=1

Project Web Access Log Off | Help

EPK | Resources | Admin

Roadmap Status Date: 1/29/2005

Choose a view: Resource Plan vs MSP Forecast

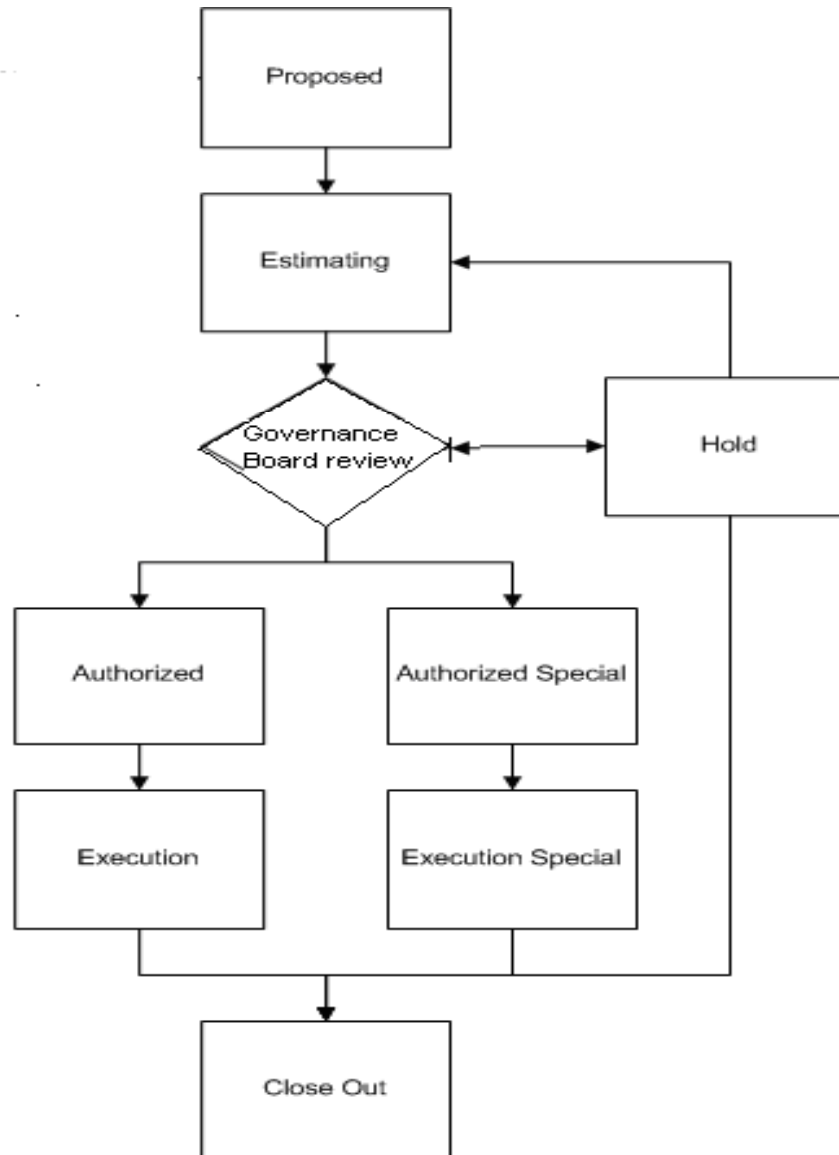
Options Sort and Group + Filter Search Projects

Create Details Analyze Close

Name	Estimate Total	Schedule Cost	Remaining Cost	Category	Jan 05 hr	Feb 05 hr	Mar 05 hr	Apr 05 hr	May 05 hr	Jun 05 hr	Jul 05 hr	Aug 05 hr	Sep 05 hr	Oct 05 hr	Nov 05 hr
Corporate	\$2,096,286	\$1,243,103	\$1,069,113	MSP Forecast	48	978	1572	1327.46	1541.57	2039.17	1467	1968.29	1822.51	908.46	483.2
				Summary Resource Plan	2116	2014	2036	1637	2121	2511	2268	2159	2156	1388	1122
IT	\$2,096,286	\$1,243,103	\$1,069,113	MSP Forecast	48	978	1572	1327.46	1541.57	2039.17	1467	1968.29	1822.51	908.46	483.2
				Summary Resource Plan	2116	2014	2036	1637	2121	2511	2268	2159	2156	1388	1122
Development	\$381,008	\$520,113	\$488,503	MSP Forecast		166	490	575.46	307.57	1336.17	895	830.29	1063.51	725.46	327.2
				Summary Resource Plan	1626	1524	1546	1337	1821	2061	1898	1778	1706	1008	742
Accounts Payable Mods for Sarbanes	\$62,600	\$63,060	\$63,060	MSP Forecast							150	136	166	266	164
				Summary Resource Plan							156	174	190	230	270
Accounts Receivable Mods for Sarbanes	\$104,400	\$153,580	\$122,070	MSP Forecast		102	200	194	469	430	200	320	164		
				Labor		102	200	194	469	430	200	320	164		
				Summary Resource Plan	260	160	200	184	384	360	424	344	270	199	72
				Labor	260	160	200	184	384	360	424	344	270	199	72
				In House	260	160	200	184	384	360	424	344	270	199	72
				Sub Contract											
Data Center	\$106,600	\$110,033	\$110,033	MSP Forecast					86	349.21	170	168	304.6	347.6	143.2

Done Trusted sites

Example of Stage-gate process



Reporting and Views

- Carefully consider reporting needs
 - Exception based reporting
 - Orient reports to management levels
 - Extensive graphical views
 - Limit number of reports any person receives

Example-Scorecard View



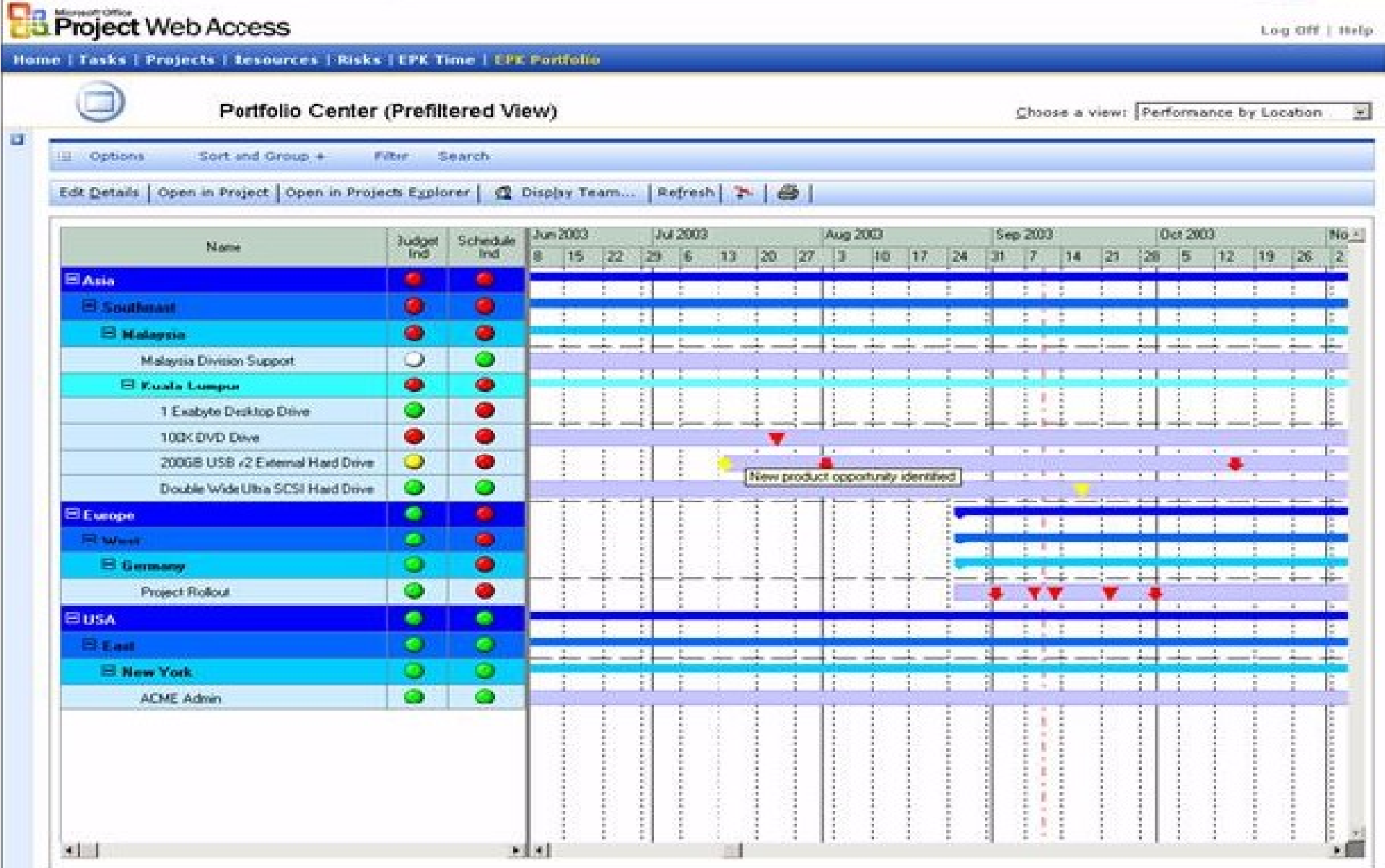
Portfolio Center

Status Date: 1/29/2005

Choose a view: Alignment with GI as cell background

Name	Weighted Rating	Corporate Image	Cost Reduction	Employee Morale	Growth	Infra-structure	Regulatory	Doing Business	Stage	Category	Jan Cost	Feb Cost	Mar Cost	Apr Cost	May Cost
Corporate	436.5	400	305	160	605	670	360	350		Budget	\$144,210	\$148,392	\$189,302	\$148,912	\$137,020
IT	436.5	400	305	160	605	670	360	350		Budget	\$144,210	\$148,392	\$189,302	\$148,912	\$137,020
Development	289.5	280	170	90	465	340	240	210		Budget	\$108,200	\$103,112	\$107,822	\$94,592	\$80,860
Internet Help Desk	32	40	50	0	60	0	0	0	Funding Review	Budget					
Storage Service Business	30	0	0	0	100	0	0	0	Execution	Budget		\$8,000	\$37,550	\$19,250	\$16,210
Supporting Application 123	20	0	0	0	40	0	0	80	Estimating	Budget	\$4,800	\$4,800	\$4,800		
Data Recovery Service	19	20	0	0	50	0	0	20	Execution	Budget				\$38,690	\$15,440
Initiative name	19	10	0	0	60	0	0	0	Proposed	Budget					
Too small to warrant a project	19	30	0	20	0	100	40	0	Authorized	Budget		\$7,340	\$4,672	\$6,172	\$5,840
Is only half of your work in the system	18	30	0	0	50	0	0	0	Execution	Budget	\$11,520	\$11,520			
Sales Tracking System Enhancemen	17.5	0	10	0	35	30	0	20	Execution	Budget	\$38,040	\$24,500	\$32,400		
In proposed stage before a project is	17	20	0	0	50	0	0	0	Proposed	Budget	\$7,680	\$5,300			
Res Planning with Generics	14	0	40	0	20	0	0	0	Estimating	Budget					
Accounts Payable Mods for Sarban	12	20	0	0	0	0	100	0	Authorized	Budget					
Accounts Receivable Mods for Sarb	12	20	0	0	0	0	100	0	Execution	Budget	\$14,400	\$14,400	\$14,000	\$12,000	\$12,000
Data Center	11	10	0	0	0	100	0	0	Execution Special	Budget					\$18,890
Division Website Enhancements	11	0	40	0	0	30	0	0	Execution Special	Budget	\$7,680	\$4,340			
PMD Support	11	0	30	0	0	30	0	20	Execution	Budget	\$7,680	\$7,680	\$9,600	\$13,680	\$7,680
Support Marketing application	10	0	0	0	0	50	0	50	Estimating	Budget	\$4,800	\$4,800	\$4,800	\$4,800	\$4,800
Whizzy new idea	10	40	0	60	0	0	0	0	Funding Review	Budget		\$10,432			
Effort totalling 200 hrs	7	40	0	10	0	0	0	20	Execution	Budget	\$11,600				
Infrastructure	147	120	135	70	140	330	120	140		Budget	\$36,010	\$45,280	\$81,480	\$54,320	\$56,160
Fibre Optics Upgrade	36	30	40	20	50	80	0	0	Execution	Budget					
Dev Support of Help Desk	15	0	25	20	10	30	0	20	Execution	Budget	\$17,610	\$15,360	\$19,200	\$17,360	\$15,360
Critical Systems	96	90	70	30	80	220	120	120		Budget	\$18,400	\$29,920	\$62,280	\$36,960	\$40,800
Project Integration with Accounti	24	20	30	0	0	80	0	0	Authorized	Budget	\$2,840	\$15,260	\$15,260	\$14,400	\$14,400

Example-Key Milestone View



Example-Interactive Scenario View

Analyze Portfolio for Budget : 2005 Fiscal Months

Choose a view: Alignment with GI as cell background

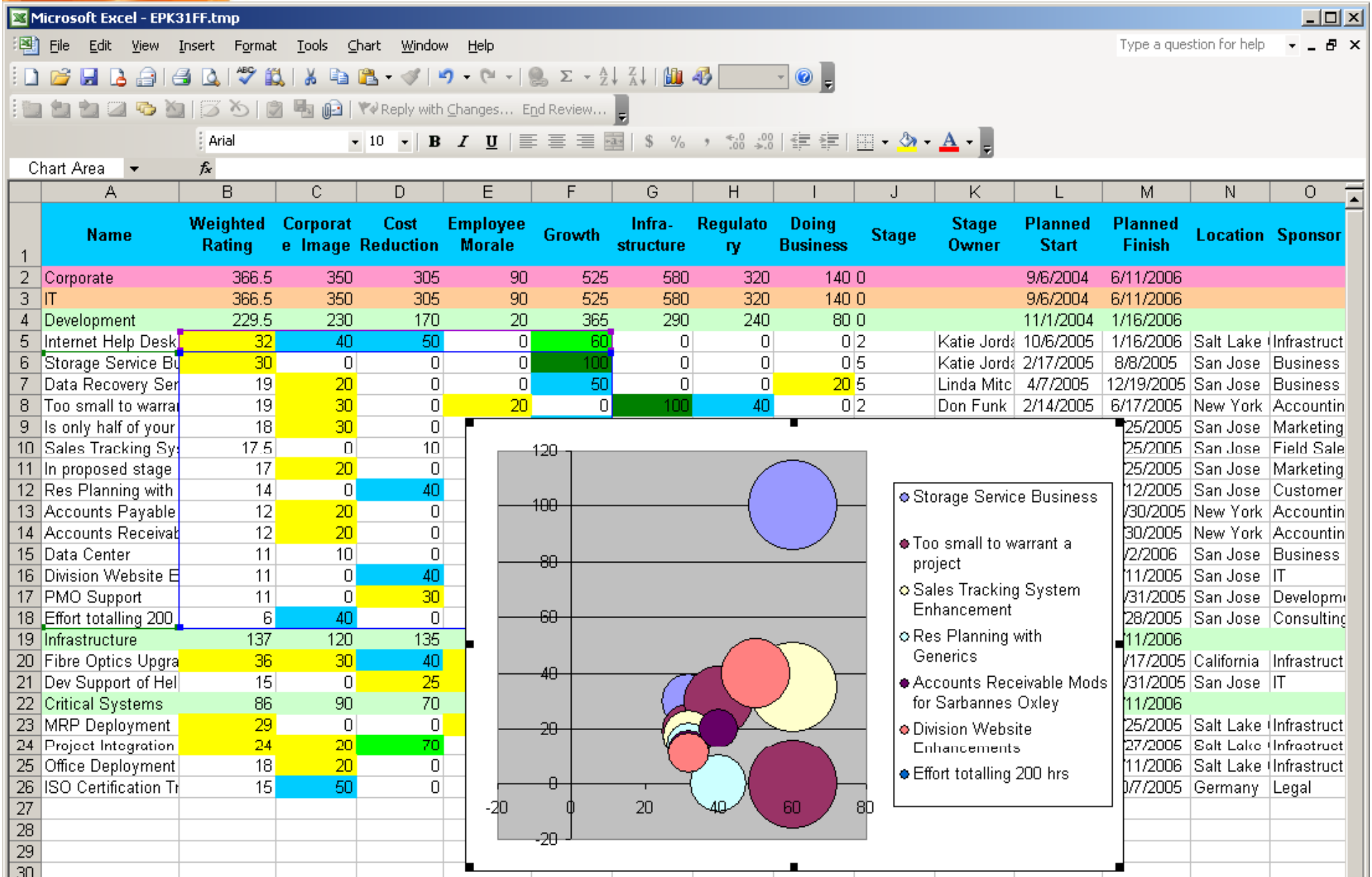
Options Sort and Group Filter Search Targets

[Return to Portfolio Center](#) [Save and Return to Portfolio Center](#)

	Name	Weighted Rating	Corporate Image	004 2005												2006								
				D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M					
<input checked="" type="checkbox"/>	Internet Help Desk	32	40																					
<input checked="" type="checkbox"/>	Storage Service Business	30	0																					
<input checked="" type="checkbox"/>	Data Recovery Service	19	20																					
<input checked="" type="checkbox"/>	Too small to warrant a project	19	30																					
<input checked="" type="checkbox"/>	Is only half of your work in the system	18	30																					
<input checked="" type="checkbox"/>	Sales Tracking System Enhancement	17.5	0																					
<input checked="" type="checkbox"/>	In proposed stage before a project is created	17	20																					
<input checked="" type="checkbox"/>	Res Planning with Generics	14	0																					
<input checked="" type="checkbox"/>	Accounts Payable Mods for Sarbannes Oxley	12	20																					
<input checked="" type="checkbox"/>	Accounts Receivable Mods for Sarbannes Oxley	12	20																					
<input checked="" type="checkbox"/>	Data Center	11	10																					
<input checked="" type="checkbox"/>	Division Website Enhancements	11	0																					
<input checked="" type="checkbox"/>	PMD Support	11	0																					
<input checked="" type="checkbox"/>	Effort totalling 200 hrs	6	40																					

Category	UoM	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals
<input checked="" type="checkbox"/> Totals		\$87,000	\$83,080	\$98,222	\$89,792	\$76,060	\$86,422	\$75,150	\$53,480	\$53,250	\$63,410	\$59,760	\$90,200	\$915,826
Labor	hr	\$80,000	\$73,080	\$70,672	\$52,192	\$61,360	\$71,072	\$57,600	\$40,480	\$43,600	\$46,560	\$48,960	\$77,200	\$722,776
Hardware	units	\$6,000	\$6,000	\$7,550	\$6,100	\$5,900	\$7,350	\$8,800	\$7,000	\$4,650	\$11,850	\$5,800	\$8,000	\$85,000
Software				\$12,000	\$28,000	\$1,800								\$41,800
Overhead			\$3,000	\$3,500	\$2,500	\$3,000	\$5,000	\$4,750	\$2,000	\$3,000	\$3,000	\$3,000	\$3,000	\$35,750
Contingency		\$1,000	\$1,000	\$4,500	\$1,000	\$4,000	\$3,000	\$4,000	\$4,000	\$2,000	\$2,000	\$2,000	\$2,000	\$30,500

Example- "Bubble Chart"



Resource Report

Microsoft Office Project Web Access 2003 - bolfordlap - Microsoft Internet Explorer

Address: http://bolfordlap/epk/sample/Shell/CustPage.asp?PageID=10006&_old=1

Project Web Access Log Off | Help

EPK | Resources | Admin | EPK Admin

Reports

New Subscription

Document Map

- ResAssnVsCommMatrix
 - Aaron Con
 - Adam Barr
 - Angela Barbariol
 - David Hodgson
 - DB Analyst
 - Department management
 - Deployment resources
 - Developer
 - Elizabeth (Liz) Kayser
 - Florian Voss
 - Greg Chapman
 - Jay Adams
 - Jay Jamison
 - Jenny Lysaker
 - Jeremy Los
 - Jim Stewart**
 - John Peoples
 - Judy Lew
 - Karen Berge
 - Katie Jordan
 - Ken Myer
 - Linda Mitchell
 - Megan Sherman
 - Michael Holm
 - Michael J. Hummer
 - Mikael Sandberg
 - Mike Nash
 - Pat Coleman
 - Procurement
 - Project Manager

EPK Group
applying Enterprise
Project Knowledge

powered by SQL Server Reporting Services

Resource Actuals, Commitments, and Assignments

Jim Stewart

Period	Accountx Payable Modx for Sarbanes Oxley		Accountx Receivable Modx for Sarbanes Oxley		Dev Support for Financial Systems	Dev Support of IIelp Desk
	Commitment	Assignments in MSP	Assignments in MSP	Commitment	Commitment	Actuals
Jan 05					50	14
Feb 05			14		50	
Mar 05					50	
Apr 05					50	
May 05					50	
Jun 05					50	
Jul 05	120	120	34	120	50	
Aug 05	24		160	24	50	
Sep 05	150	168	6	150	50	
Oct 05	150	176		150	50	
Nov 05	40	24		24	50	
Dec 05					50	
Total	484	488	214	468	600	14

Trusted sites

Compare Scenarios

ORACLE Projects

Home My Portfolios Logout

Portfolio: IT Portfolio (Replan for revised financial targets)

Planning Cycle

Scenarios

Scenarios > View Comparisons

View Comparisons

Description: Replan for revised financial targets
Portfolio Type: Global Departmental Portfolio

Start Orga

Analyze multiple scenarios to find the best fit, and to gain insight to how they measure up against goals AND each other

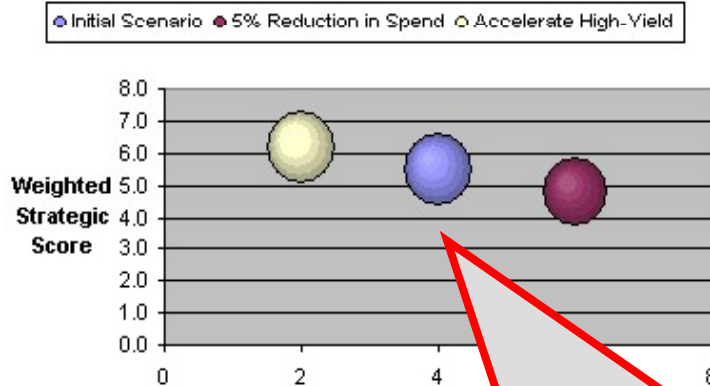
Financial Metrics

Strategic Objectives

Scenario 1: Initial Scenario Scenario 2: 5% Reduction in Spend Scenario 3: Accelerate

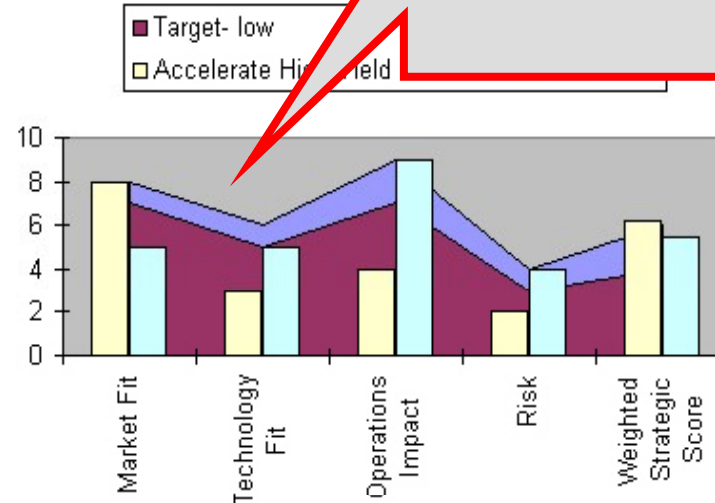
Risk Analysis

Risk Analysis



Evaluate trade-offs to support decisions

Total Scores versus Targets



Scenario	Market Fit	Operations Impact	Risk	Technology Fit	Recommended
Initial Scenario	5	9	4	5	
5% Reduction in Spend	4	8	6	5	✓
Accelerate High-Yield	8	4	2	3	✓

Recommend Scenarios

ORACLE Projects

Portfolio: IT Portfolio (Replan for revised financial targets)

Planning Cy

Scenarios

Description **Replan for revised financial targets**
 Portfolio Type **Global Departmental Portfolio**

The application allows you to recommend multiple scenarios and review them.

Select Scenario:

- Recommend
- Withdraw
- Approve
- Compare
- Set as the Current Working Scenario

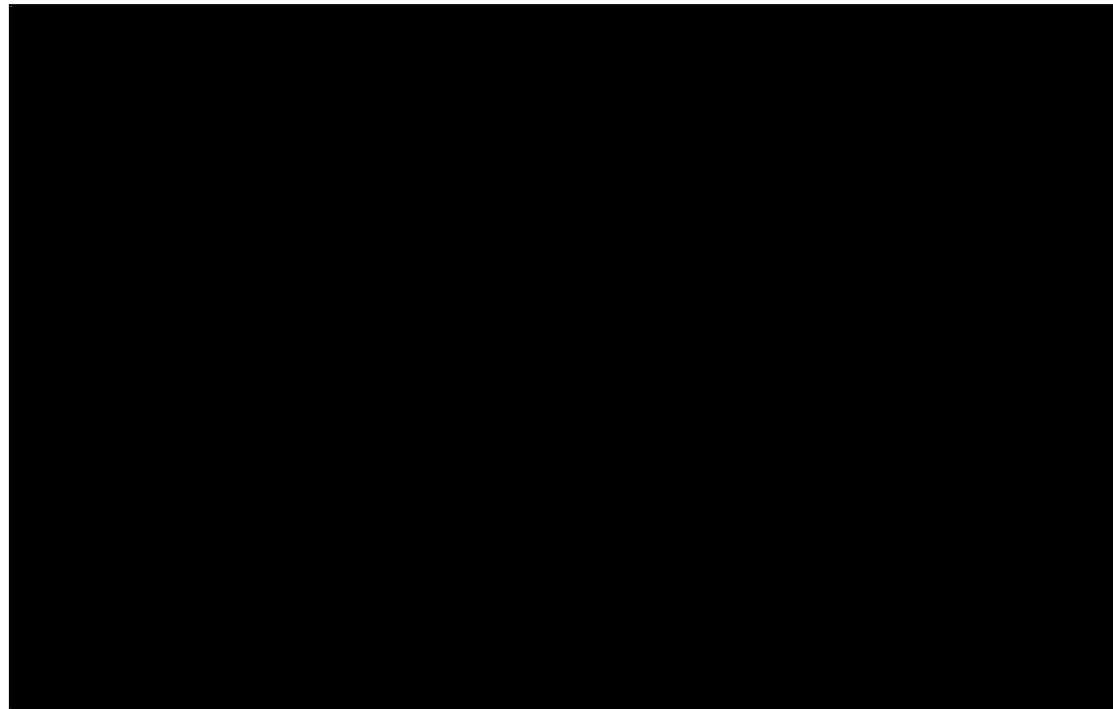
Select	Scenario Name	Description	Net Present Value	Discount Rate	Funds Required	Funds Available	Recommended	Approved
<input checked="" type="radio"/>	Initial Scenario	Initial Scenario 09-Sep-04	4,638	10%	3,663	3,675		
<input type="radio"/>	5% Reduction in Spend	Flat reduction on non-regulatory work	4,366	10%	3,363	3,300	<input checked="" type="checkbox"/>	
<input type="radio"/>	Accelerate High-Yield	Start profit-focused work immediately				500	<input checked="" type="checkbox"/>	
<input type="radio"/>	Defer Higher-Risk Projects	Shift high-risk work to FY06				500		
<input type="radio"/>	Outsource Design	Use svc firm to speed	1,315	8%	1,863	3,500		

For each recommended scenario, you can drill down into an executive summary that provides insight for your recommendation.

Microsoft Office Project Portfolio Server 2007

Integration with Project Server 2007

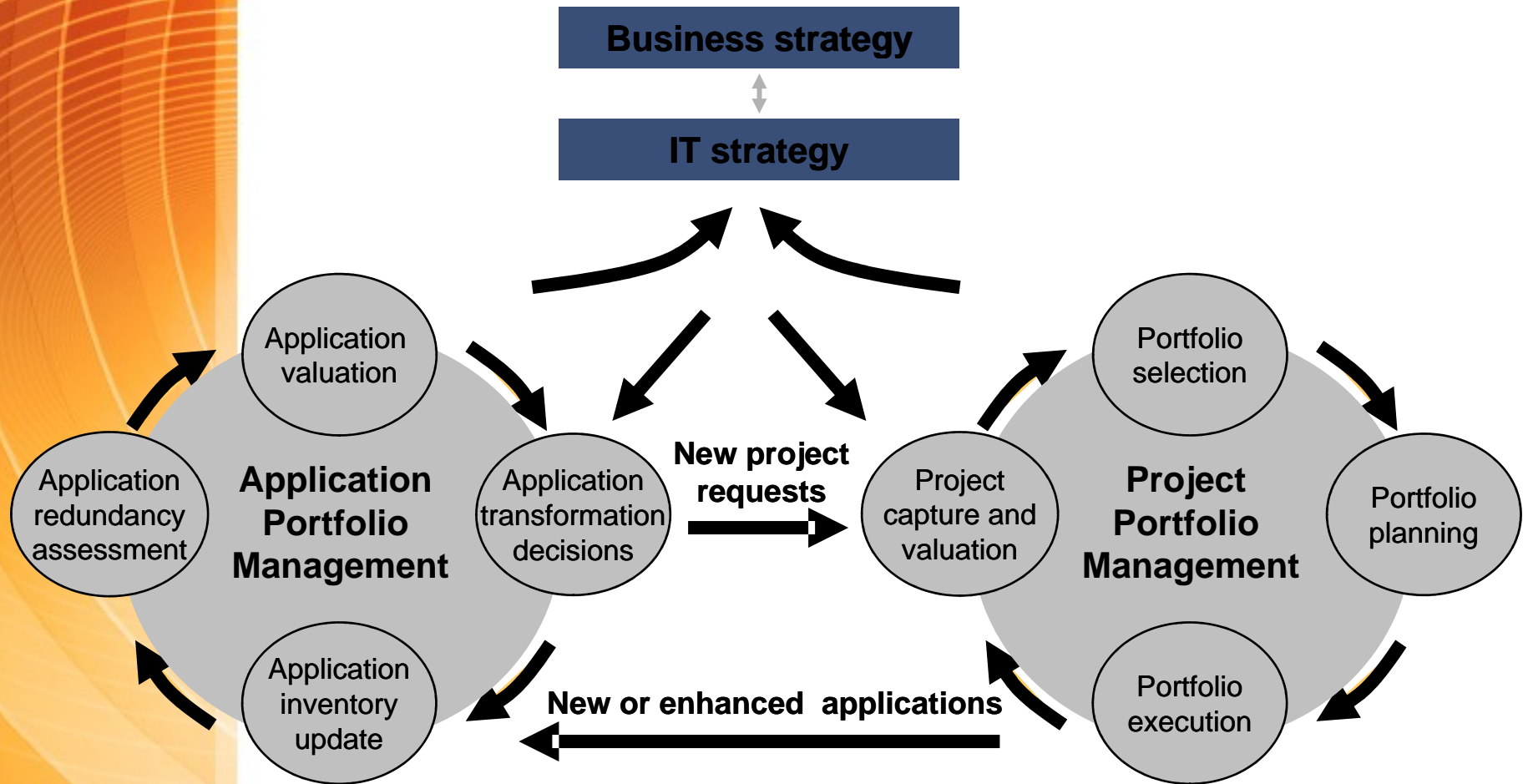
- **Re-engineered:** The Project Server Gateway in MOPPS 2007 has been rewritten to use the new Project Server interface (PSI) API in Office Project Server 2007. MOPPS 2006 relied on Project Data Services (PDS) API to communicate with Project Server 2003.
- **Backward compatibility:** MOPPS 2007 only integrates with Project Server 2007.
- **Work management:** MOPPS 2007 can import all work from Project Server 2007 (full projects, proposals, and activity plans).



(Note MOPPS 2007 does not currently integrate with the Resource Plan component of proposals and activity plans)

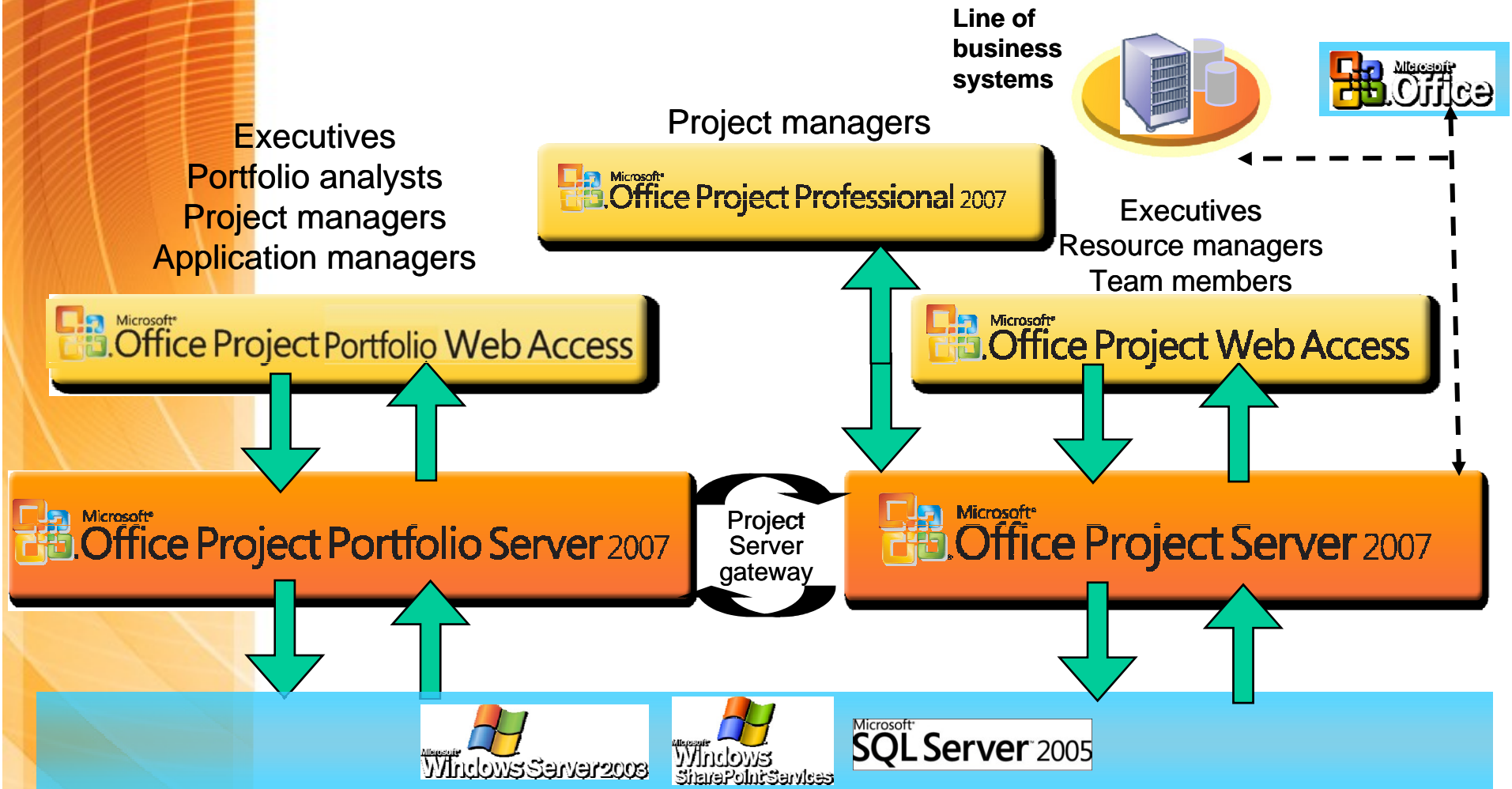
Manage the synergies between PPM and APM

Project Portfolio Server 2007 includes best-practice portfolio analytical techniques to help organizations manage project, program, and application portfolios



Microsoft Office Project Portfolio Server 2007 is a key component in the EPM solution

Project Portfolio Server 2007 integrates with Project Server 2007 to provide organizations with an end-to-end project portfolio management (PPM) solution



Microsoft Office Project Portfolio Server 2007

Schedule tab enhancements (screen shot)

Microsoft Office Project Portfolio Server 2007
 Builder / Edit Project 'Focus Group Product Implementation'

Builder Optimizer Dashboard About Log Out
 Settings My Scorecard Resource Pool Preferences Reports

Snapshot Reports
 May 2006 [New Snapshot](#) [Delete Snapshot](#) [Lock](#)

Benefit Estimates Strategic Impact Risk Issues & Risks **Schedule**

Microsoft Project Gateway

Planned Dates		Forecast Dates		Actual Dates		Completion
Start Date	End Date	Start Date	End Date	Start Date	End Date	Completion
1/1/2006	9/11/2008	1/1/2006	9/11/2008	1/1/2006		25

[Update](#)

Phases/Milestones

Project Schedule Name	Planned Dates		Forecast Dates		Actual Dates		Completion
	Start Date	End Date	Start Date	End Date	Start Date	End Date	
<input type="radio"/> Start Date		1/1/2006		1/1/2006		1/1/2006	<input checked="" type="checkbox"/>
<input type="radio"/> 1- Initiate	1/1/2006	3/1/2006	1/1/2006	3/1/2006	1/1/2006	3/1/2006	100 %
<input type="radio"/> Initiate Completed		3/1/2006		2/28/2006		2/28/2006	<input checked="" type="checkbox"/>
<input type="radio"/> 2- Requirements and Design	3/1/2006	8/1/2006	3/1/2006	8/1/2006	3/1/2006		25 %
<input type="radio"/> Requirements Document Sign Off		6/1/2006		6/1/2006			<input type="checkbox"/>
<input type="radio"/> Design Completed		8/1/2006		8/1/2006			<input type="checkbox"/>
<input type="radio"/> 3- Build	8/1/2006	8/1/2007	8/1/2006	8/1/2007			0 %
<input type="radio"/> 4- Test	8/1/2007	4/1/2008	8/1/2007	4/1/2008			0 %
<input type="radio"/> 5- Launch	4/1/2008	9/11/2008	4/1/2008	9/11/2008			0 %
<input type="radio"/> End Date		9/11/2008		9/11/2008			<input type="checkbox"/>

[Add](#) [Edit](#) [Delete](#)

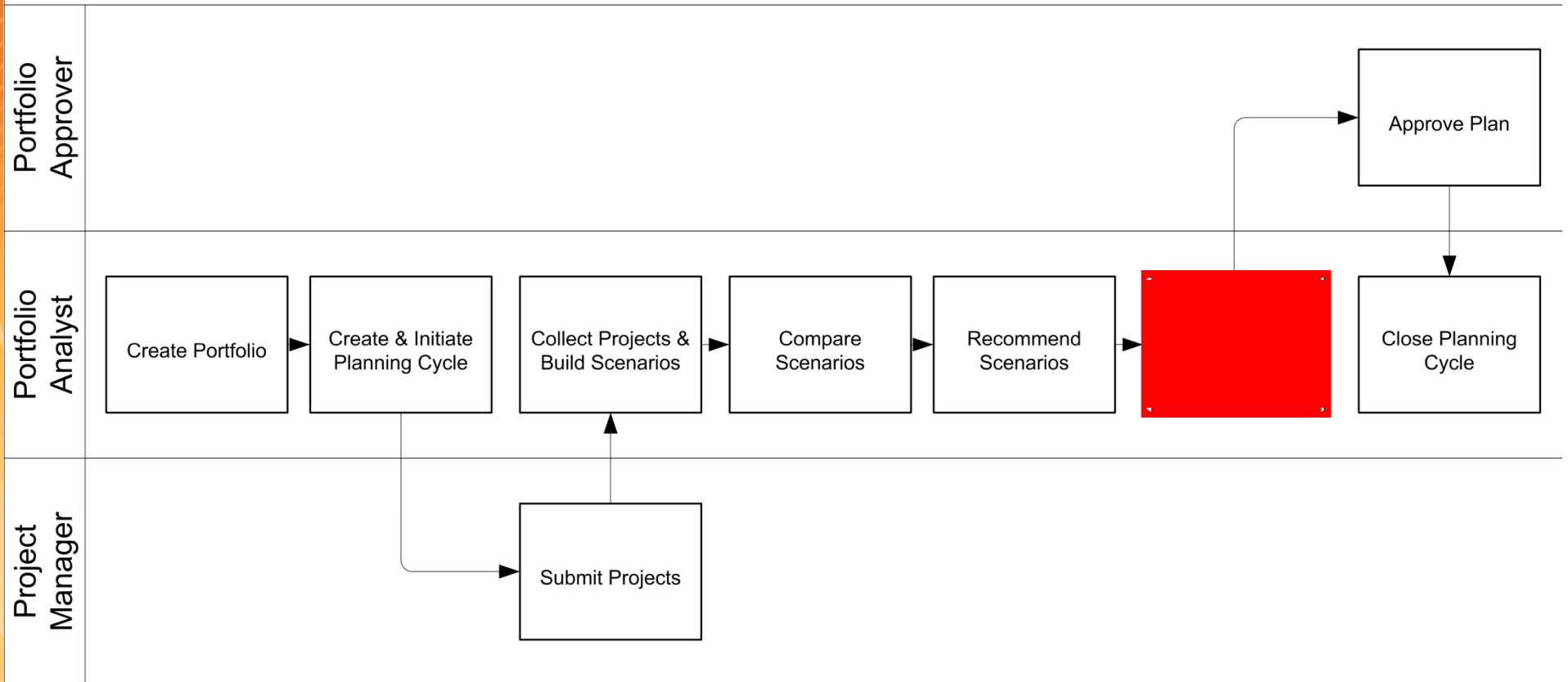
Dependencies

Milestone Name	Project	Milestone

[Add](#) [Delete](#)
[Close](#)

Portfolio Planning Flow

Oracle Project Portfolio Planning - Flow







The Board Room - Your Life

VISIONS

INTO

REALITY...

An aerial photograph showing the landing gear of several large commercial airplanes in flight against a clear blue sky. The landing gear is arranged in a line, with the wheels and struts clearly visible. The image is framed by a red border at the top and bottom, with a white curved shape separating the top red section from the main image area.

R.E.M.

Rapid Engineered Mind Methodology

The Balanced Dashboard

**R.E.M. is the Leadership and foundational component of:
The Rapid Implementation Methodology R.I.M.**



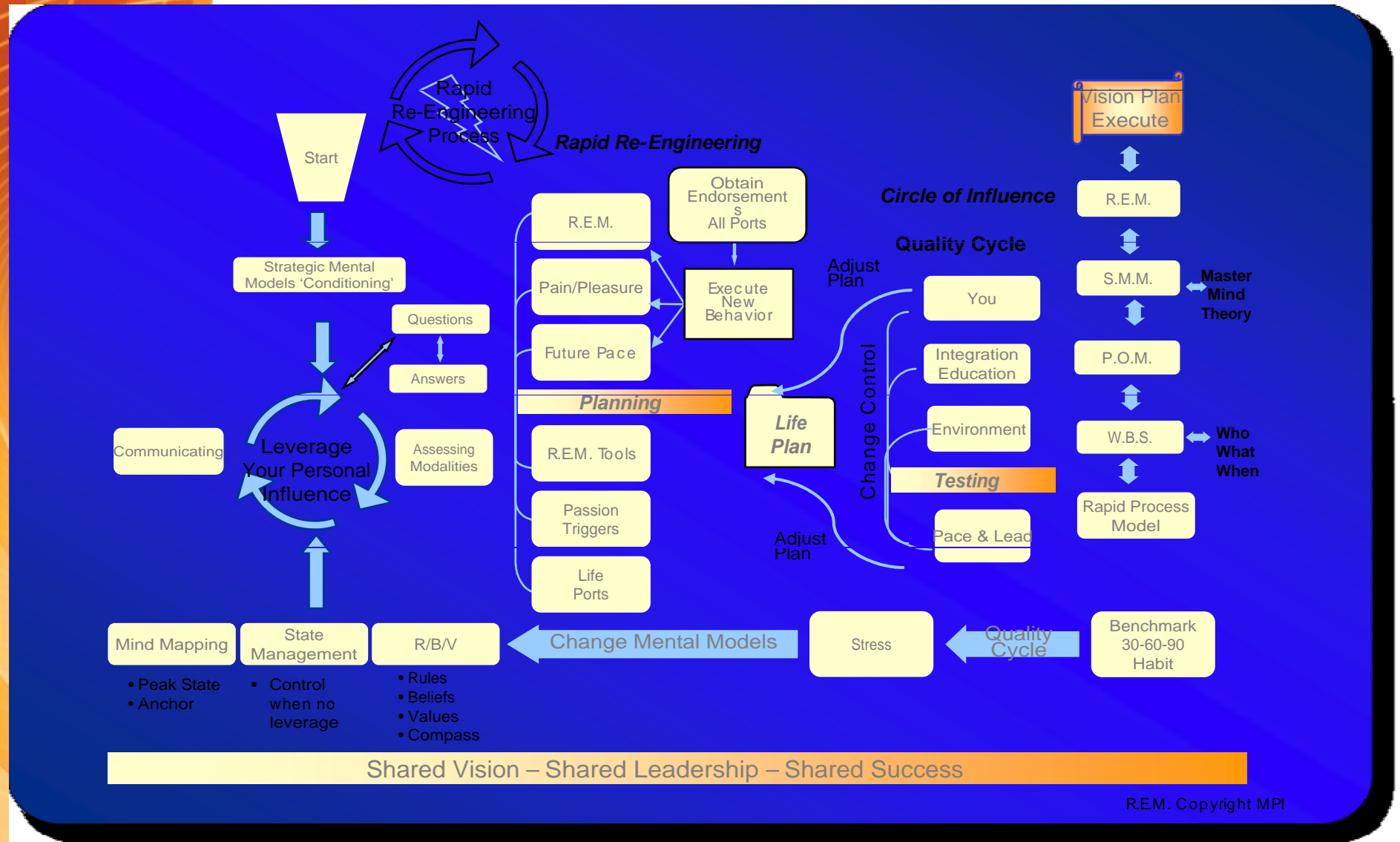
Rapid Engineered Mind Methodology (R.E.M.)

What is R.E.M.?

- R.E.M. is a comprehensive methodology that helps executives and teams turn vision into reality. R.E.M. provides *a step by step process that translates vision into Life Plans which shape Destiny*
- The R.E.M. manual is a comprehensive toolkit addressing every port of life. Packaged in 6 modules with a collection of over 80 tools, benchmarks, matrices, flowcharts, plans and strategic instruments

Rapid Engineering Model Methodology

The Balanced Dashboard



Ports of Life

1. Sphere of Influence
2. Spirituality
3. Family
4. Health – Physical and Mental
5. Business/Career
6. Financial
7. Environment
8. Social (fun)
9. Community and Contribution



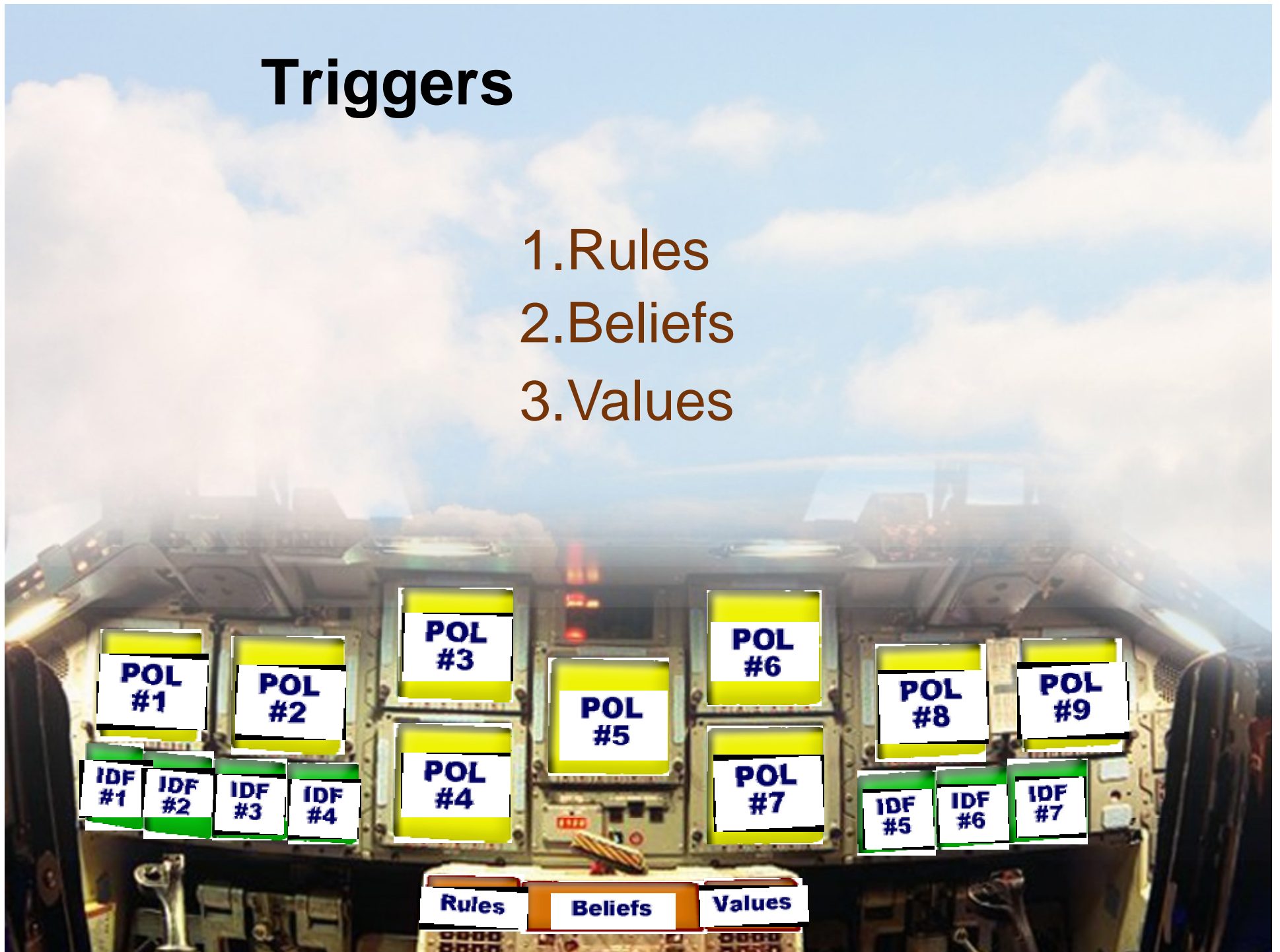
Internal Driving Forces

1. Passion
2. Communications
3. Intellectual
4. Emotional
(state management)
5. Playfulness
6. Love
7. Pleasure



Triggers

1. Rules
2. Beliefs
3. Values



R.E.M.

CAUTION!
entering RED zone
EJECT - EJECT - EJECT



Client-Centered Communication Toolkit

Focus	Tools	Description
<ul style="list-style-type: none"> • Senior Management • Clients 	Customer Satisfaction	How to identify our clients' views of company, product and you
<ul style="list-style-type: none"> • Clients • Corporate Organization • Business Units 	PeopleDay "Special Event"	How to strengthen key customer relationships by moving them more toward a partnership model
<ul style="list-style-type: none"> • Senior Management • Sponsors 	Sessions RPP and EPC.	How to create high value for the sponsors ensuring that the right resources are dedicated to the right deliverables
<ul style="list-style-type: none"> • Senior Management • Clients • Functional Business Reps. • Core Project Team 	Project Management Software (e.g.. MS Project)	How to increase the yield from a client by determining the specific relationship and information, time, and resource requirements of each clients
<ul style="list-style-type: none"> • Team 	Status Meetings	How to assess problem situations, find solutions and discuss open issues
<ul style="list-style-type: none"> • Team • Senior Management 	Problem-tracking Log	How to identify and document problems
<ul style="list-style-type: none"> • Senior Management • Sponsors 	List of Best Practices	Toward a partnership model

Communication Strategy Matrix

Figure 3I: Write without hesitation.

Target Audience	Source	Message	Frequency
Senior Management (Owner's Council)	<ol style="list-style-type: none"> 1) Human Resources Off-site 2) JAD session 3) Copy of Project Plan 4) Critical Update 5) Project Bulletin 	<ol style="list-style-type: none"> 1) Updates & timeline 2) Identify & prioritize project deliverables 3) Tasks and resource allocation:% complete 4) Issues & problems 5) Project accomplishments, training schedules, PS press releases 	<ol style="list-style-type: none"> 1) Quarterly 2) Before the start of each project phase 3) As updates occur 4) As needed 5) Monthly
Functional Users	<ol style="list-style-type: none"> 1) Human Resources Off-site 2) Status Meetings 3) Project Bulletin 	<ol style="list-style-type: none"> 1) Updates & timelines 2) Updates & accomplishments, open issues 3) Project Accomplishments, updates, training schedules, PS press releases 	<ol style="list-style-type: none"> 1) Quarterly 2) Weekly 3) Monthly
General User Population	<ol style="list-style-type: none"> 1) Project Bulletin 2) Self Service 	<ol style="list-style-type: none"> 1) Project Accomplishments, Update, training schedules, PS Press releases 2) Updates 	<ol style="list-style-type: none"> 1) Monthly 2) As needed

The R.P.M. Plan

Global Strategy Blueprint Figure 4E: REM



Write as rapidly
as possible
without hesitation

Empowerment Model





You as the Center of Your Sphere of Influence

- Use your imagination!

Figure 5A: Write as rapidly as possible
without hesitation!

Figures Provided in detailed workshop.



Influence

Behavior Modeling

What WILL Happen?

Understanding Who, What, When & Why

Business Intelligence

WHY did it Happen?

Data to Decision

Operational

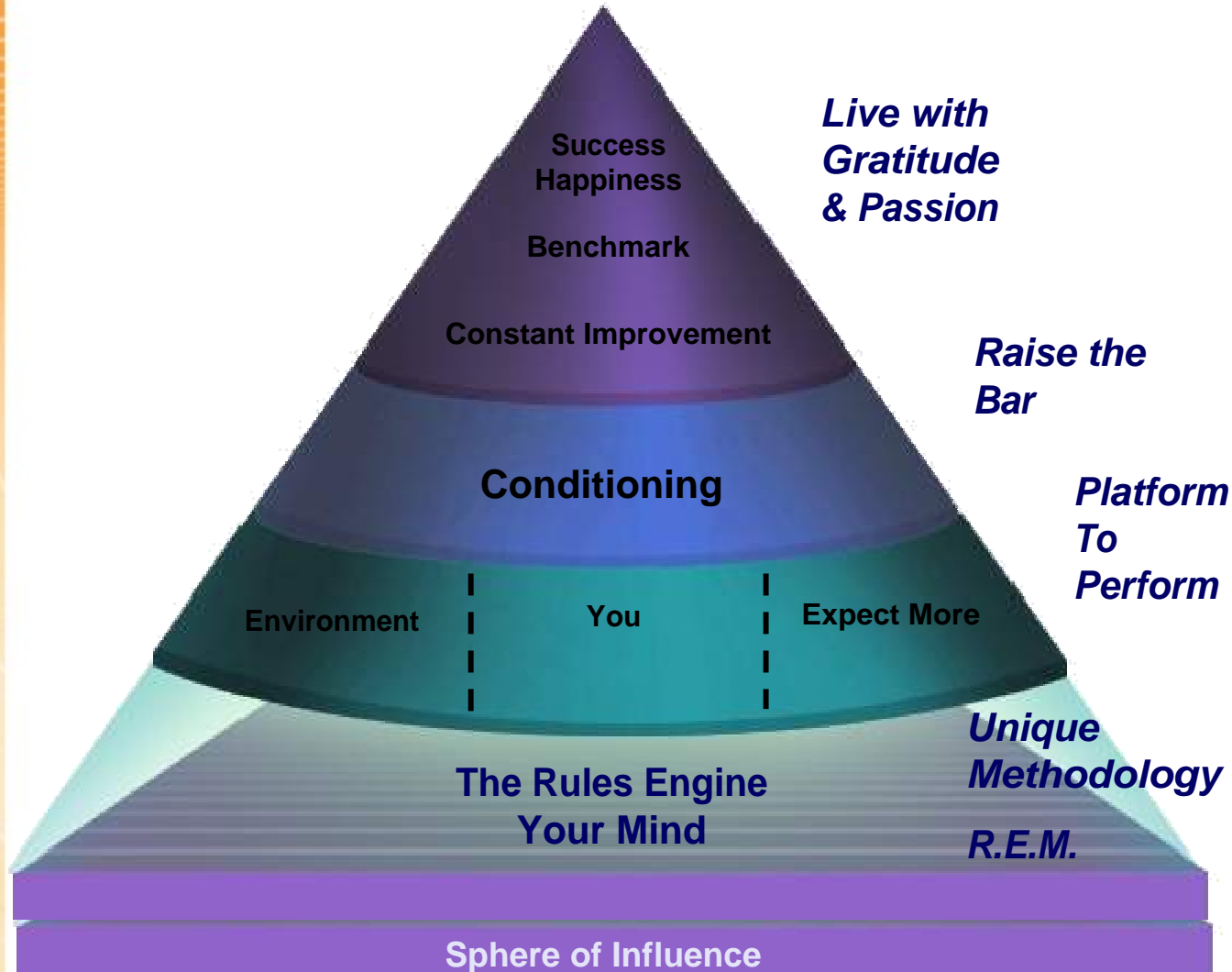
What Happened?

The Magic of Persu

- Beliefs and reality
- Relationships
- Visual clarity
- Positioning the future
- Integrity and trust
- Rapport and communication
- Flexible and skilled observer
- Attention to details
- Go beyond expectations



Personal Integration







Vision – Execute – Plan

- Project Management System for Your Life
 - Rapid engineered methodology tools & disciplines
 - Life Entity Diagram - LEAD
 - Strategic Measurement Matrix – S.M.M.
 - Project Objective Matrix – P.O.M.
 - Detailed Operational Guide (DOG) - W.B.S. (work break-down structure)

Timing and Benefits of Adopting

Preference #1:

Proactive
Leadership

Provide Direction

Preference #2:

Preference #2

Upon a project
request to meet a
business solution

Aligned
with
Clients
for Life

Benefits

- ▶ Develop high level strategy that is client-driven
- ▶ Contributes to long-term, sustainable advantage
- ▶ Provides client focus for change (process) management
- ▶ Brings client perspective to culture & leadership issues
- ▶ Establishes our Web of Influence and realistic mutually agreed upon expectations

Timing & Benefits of Adopting JAD's



Choices



Decisions

Distinctions

May 19, 2007



Project Portfolio Management & The Rapid Implementation HCM Methodology

Mary Ann McIlraith

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www.maximum-potential.com

IHRIM Pre-Conference Education

HRCI Credit Hours



This program,ORG-PROGRAM-9930, has been approved for 3.5 recertification credit hours toward PHR, SPHR and GPHR recertification through the Human Resource Certification Institute (HRCI). Please be sure to note the program ID number on your recertification application form. For more information about certification or recertification, please visit the HRCI homepage at www.hrci.org.