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for a new day

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Office Project 2007

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# Roadmap for Project Portfolio Readiness

- Beyond Tools: Understanding the “Implementation Challenge”
- Key Challenges & Solutions
  - People
  - Process
- Roadmap Approach
- Questions

# Reason for participating?

- Trying to optimize an enterprise agreement
- Upgrading from Project 2003 to 2007
- Recently Purchased Project 2007
- Considering Project 2007
- Planning to Establish a PPMO or PMO

# Portfolio Management Defined

IT Portfolio Management (PfM) revolves around managing a set of assets:

- ✓Hardware
- ✓Software
- ✓Human resources
- ✓Data and Processes
- ✓Projects

...in order to minimize cost and risk, as well as deliver maximum business value based on business objectives, strategies, and assessment of present and future performance.

## **PfM Requires:**

- Consistent effort (time) tracking
- Solid governance
- Commitment to organizational change
- Strong ties to business and IT objectives
- Vision of desired performance
- 1 to 3 planning cycles to mature

## **PfM Is not:**

- As valuable if all project initiatives are not considered
- A once-a-year event
- Concerned only with discretionary versus maintenance funds

# Business Landscape

- High-value shareholder return
- Time to market
- Productive workforce
- Cost control

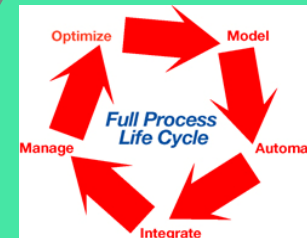
# Implementation Challenge

**PfM and PM Strategy**

**Technology**



**People**

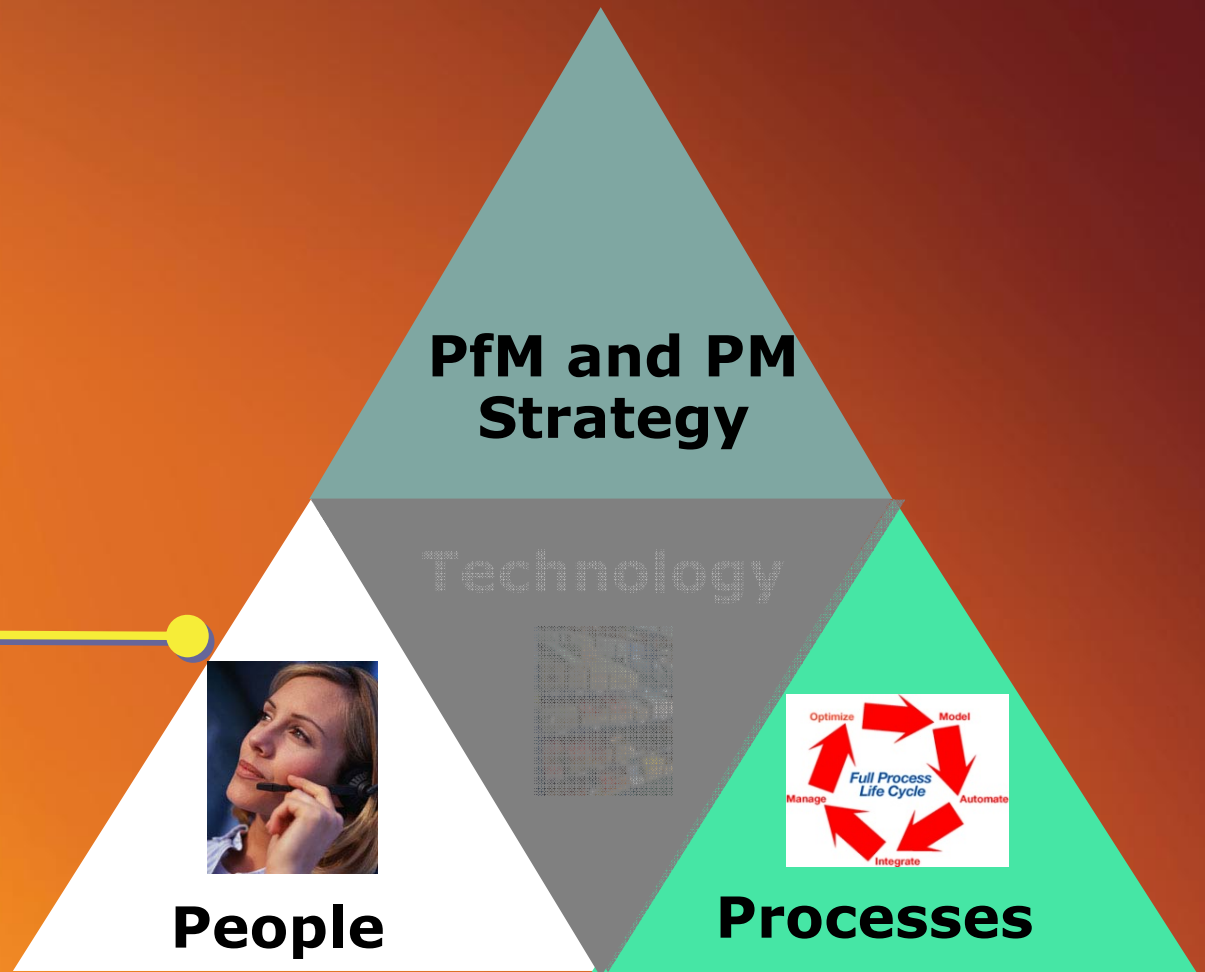


**Processes**

# People Challenges

## Examples

- Resistance to change
  - Business groups willingness to change decision making process
- Resistance to “oversight”
- Perceived steep learning curve
- Perception of additional work
- Misunderstanding of PfM capabilities and maturity



# People Solutions

## Challenge

### ***Resistance to change***

Business groups willingness to change decision making process

### ***Resistance to “oversight”***

### ***Perceived steep learning curve***

### ***Perception of additional work***

### ***Misunderstanding of PfM capabilities and maturity***

## Solution

Organizational change management starts with executive leadership and solid governance

Communication and leadership

Marketing - Start simple, pilot, mentor, develop user groups, create small successes

Capture the basics about your portfolio (3 – 4 key attributes for each project)

PfM Readiness assessment - Close maturity gap, focus senior staff on portfolio

# Process Challenges



## Examples

- Immature processes
- Processes are Ad Hoc
- Not an annual event
- Processes are disconnected from the business

# Process Solutions

## Challenges

*Immature processes*

*Processes are Ad Hoc*

*Not an annual event*

*Processes are disconnected from the business*



## Solutions

Process improvement based on a phased approach  
Focus on developing and deploying processes with the highest return

Focus implementation on execution phases - start with the "lite" process methods first

Incorporate into regular PFM assessment  
How are our active projects performing?

Engage the business in process development and deployment efforts

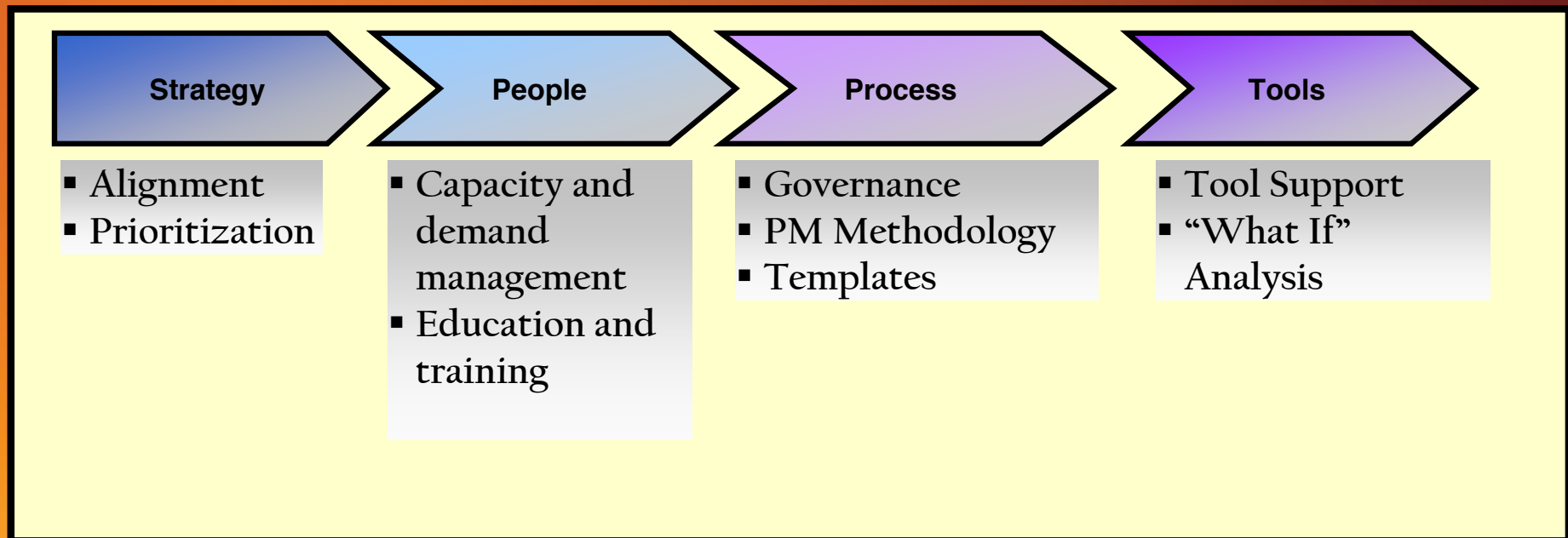
# Roadmap Approach

- PfM Strategy and Vision connected with business
- Readiness Assessment
  - People
  - Processes
- Develop an integrated roadmap from the assessment that :
  - People
  - Process
  - Technology
- Communicate, Communicate, Communicate

# Roadmap Approach

- **Assess**
  - Interview organization, understand competitive landscape
- **Define**
  - Define strategy and establish goals
- **Create**
  - Create governance process and connect to central project repository
- **Assess**
  - Score and categorize projects
- **Balance**
  - Actively review / manage and adjust accordingly

# Some Potential Roadmap Functions



# Portfolio Management Value

## Project to Corporate Value

### *Enablers:*

- *Portfolio and Program Management tool set*
- *Communication and training*
- *Project view / global usage*



### **Project Value**

- Improved Management
  - Approval
  - Status reporting
  - Prioritization
- Collaboration
- Strategy alignment

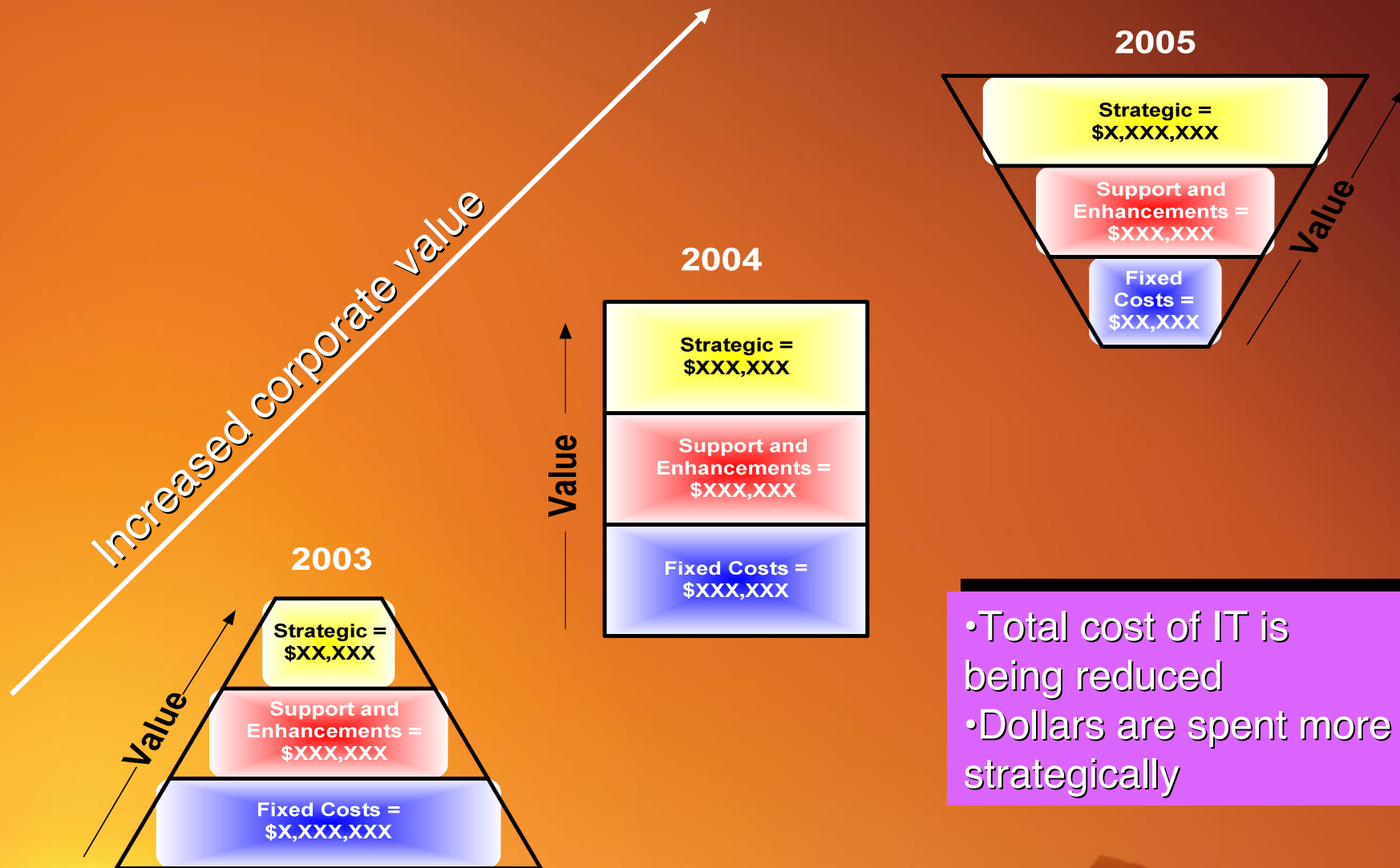
### **Business Value**

- Portfolio Analysis
  - Resource demand planning
  - Reporting/Dashboards
  - Prioritization
- Detect troubled projects
- Cost management

### **Corporate Value**

- Single investment view
- Reduce Duplication
  - Applications
  - Training
  - Expenditures
- Tie to corporate strategy

# PfM Value Example



- Total cost of IT is being reduced
- Dollars are spent more strategically

# Conclusion



- Increase the value of your organization by:
  - Creating closer business alignment
  - Improve project performance and delivery
  - Increase productivity and efficiency



The image features a warm, orange-to-red gradient background that resembles a sunset or sunrise over a mountain range. The Microsoft logo is prominently displayed in the center in a bold, white, sans-serif font. Below it, the slogan "Your potential. Our passion." is written in a smaller, white, italicized sans-serif font. At the bottom of the image, there is a silhouette of a mountain range against the bright light of the sun setting or rising.

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