Advisicon, Inc

Project Server 2010: Get the Most for Your Organization, Now and for the Future

Sometimes it's not just about the technology, the processes, or the people; it is all about ensuring that we have alignment of our projects to the business for the best possible impact on the business!

Tim Cermak, MBA, PMP
Tim Runcie, MCTS, MCP, MVP, PMP
Doc Dochtermann, PMP, PMI-SP, MCITP

April 2011

Microsoft

Information in the document, including URL and other Internet Web site references is subject to change without notice. Except as expressly provided in any written license agreement from Microsoft, the furnishing of this document does not give you a license to any patent, trademarks, copyrights, or other intellectual property that are the subject matter of this document.

Table of Contents

Executive Summary

Organizations in the 21st century, especially in light of the post-economic environment of the 2008-2010 timeframe, are looking at technology platforms that can help them solve issues now while being accounted for by the Chief Executive/Financial Offices as a solid investment to grow with their business, in full support of the direction the organization wishes to stretch and move. Microsoft Project 2010 (also referred to as Project Server 2010 or Enterprise Project Management) is meeting expectations and appealing to a wider group of business users to solve planning, forecasting, and financial control needs. This is largely attributed to the ability for Project 2010 to slip into the sweet spot of supplying a robust technological platform that can bridge project management methodology and an organization's individual maturity approach for growth. Project Server 2010, now built upon the business collaboration system SharePoint Server 2010 platform, is delivering enterprise-wide support of aligning work with organizational strategy, strong tactical execution, and meaningful Business Intelligence (BI) empowering organizations to make informed decisions that impact their current situation, but also provide a strong foundation for future goal achievement.

This white paper was created to shine some light on critical elements related to the discussions, decisions, and adoption of Microsoft Project 2010. Companies are looking to better align strategy with financial planning and look to their corporate diversity, regional presences and departmental structure for the best way forward. The purpose of this white paper is to address some of the main factors for scalability, best practices, and opportunities for creating wins from the potential challenges often faced when implementing a solution such as Project Server 2010. The information presented will initiate dialogue and thought around the use of and growth with Project 2010 that includes the individual SKUs of Project Client, Project Server and SharePoint Server.

Project 2010 Scalability Flowchart:

Throughout the perspectives of this paper, we will be referencing the Project Scalability flowchart (http://go.microsoft.com/fwlink/?LinkID=216914). This chart is designed to assist the different roles and perspectives in dealing with the challenges and the next steps to leveraging Project 2010 and Project Server 2010's capabilities, depending on your entrance point for using the application.

The full version of this workflow is available accompanied by several 10 minute videos directly from the Microsoft website, enabling you to plan and scale Project 2010 to fit with your organization's needs.

http://www.microsoft.com/project/en/us/articles-white-papers.aspx

Microsoft® Project Server 2010

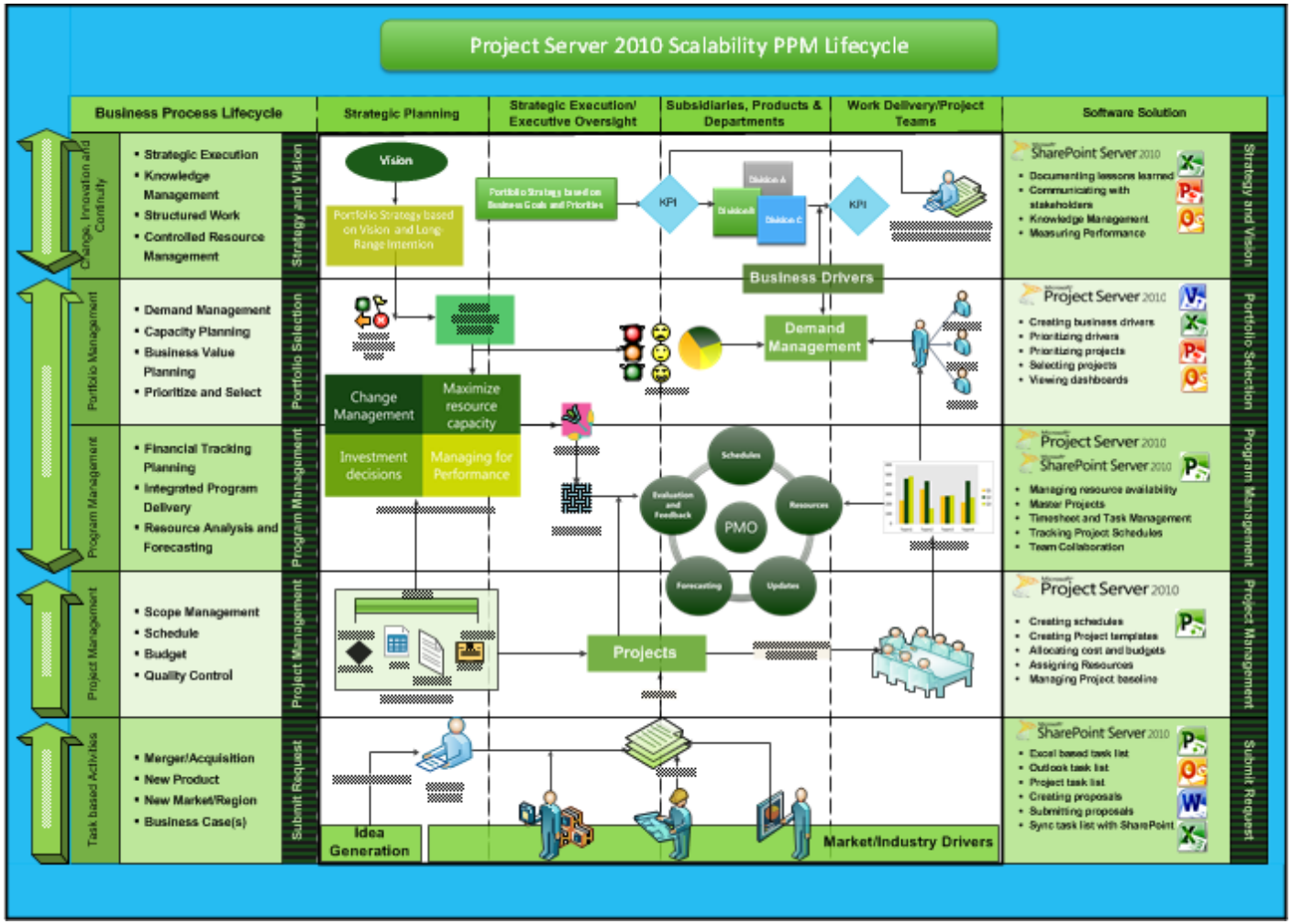
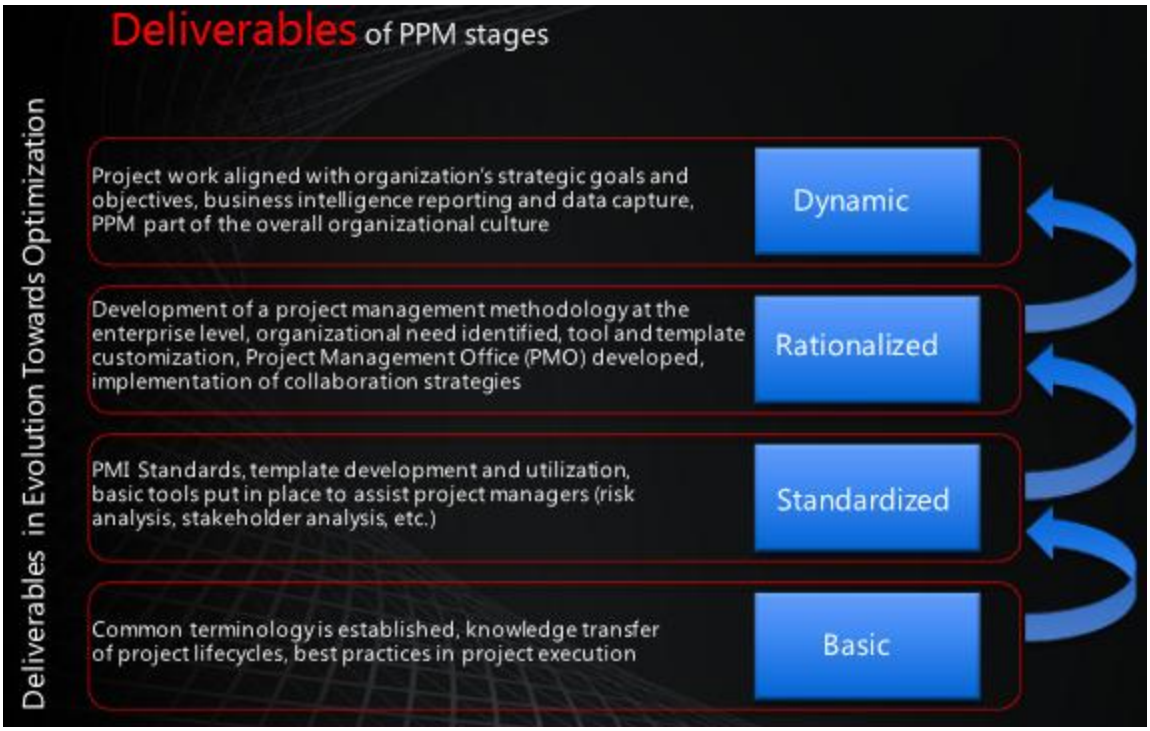


Figure 1: Flowchart

Introduction

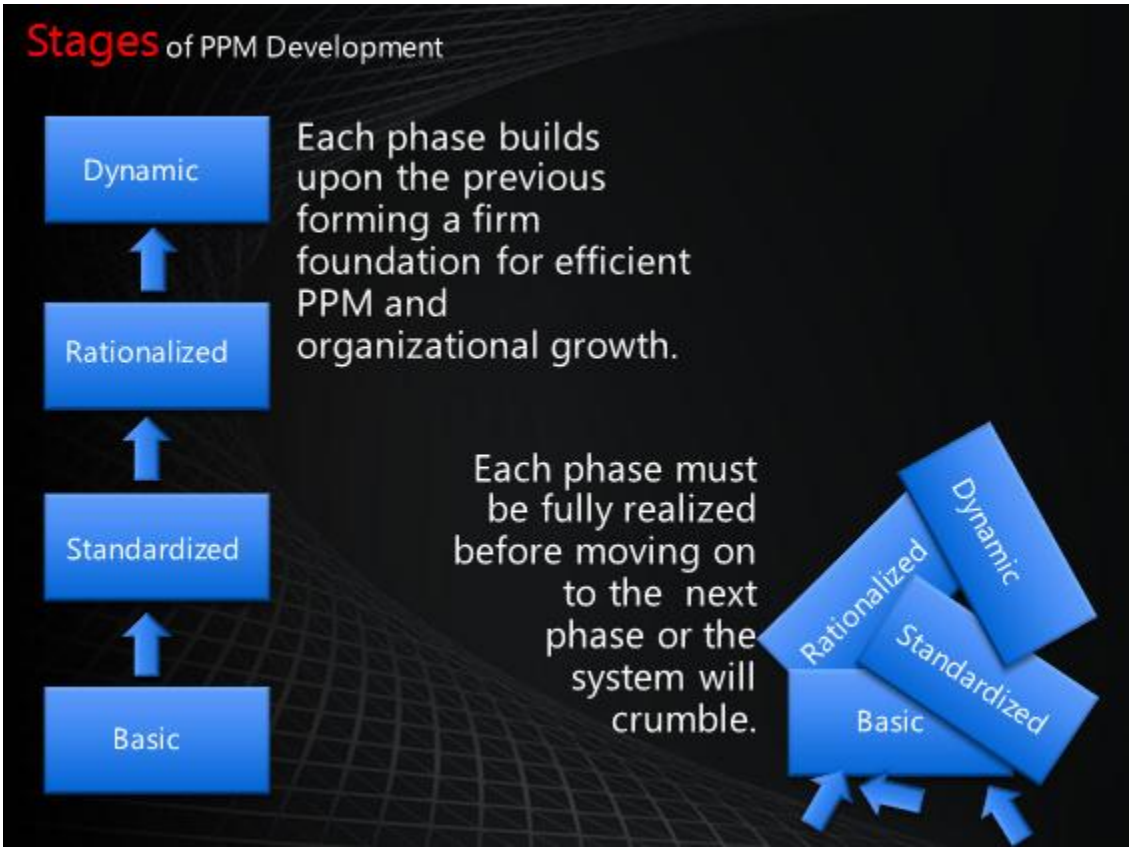
One size does not fit all. Work systems need to be flexible, based on the problem you are trying to solve, the culture of the organization, and the timeframe in which the solution is required. Project 2010 is an extremely flexible, configurable environment for managing the work, the resources, the schedules, and the reporting and collaboration needs of the enterprise.



The business market is giving us data that the focus is not just about the technology, the processes, or the people; it is all about ensuring that we have the best possible impact on the business, as well as seeing the alignment of our projects to the business and realizing long term value from leveraging this technology.

This holistic approach is known as Project Portfolio Management (PPM). PPM takes into account project management methodology (standardized terminology, common project lifecycles, project execution stages, etc.), the organization's maturity approach (development of impactful business processes, continuous improvement strategy, management theory, etc.) and an enterprise-wide technical platform (Project Server 2010, SharePoint Server 2010, etc.) that allows for thorough business use of capturing data, analyzing metrics, and formulating a plan to take appropriate actions.

Although PPM has been most prevalent in some select industries, such as construction, aerospace and some Information Technology (IT) environments, the expansive demand and benefits have been growing across organizations since the mid-2000s. A few key factors have led to the successful wider use and adoption of PPM, such as adaptable technology platforms and growing diverse end-user profiles.



As the market and technical applications have evolved in capabilities and innovativeness, new challenges and opportunities have emerged for all major industry stakeholders. Stakeholders can be classified into three main stakeholder groups, such as:

- Practitioners (customers/consumers)
- Independent Solution Partners
- Services and Training Providers

As a result of the evolutional change in the PPM environment, all three stakeholder groups have realized growth and demand from segments and corporate entities previously untapped. Although this is great for business and the PPM competencies, organizations still have to justify spending capital to acquire

technology and mentorship knowledge to fully leverage these capabilities. Organizations are expecting measurable return on investment (ROI) in regard to the capital costs associated with implementing this type of solution. Project 2010 serves as the vehicle to bring immediate benefits of PPM to projects in-flight, and long term returns with alignment to organizational objectives.

We must therefore address PPM from a business perspective and help the key users (via their functional role) understand how to leverage and get the most from this solution, both now and as they and their organizations mature with the product.

This paper will highlight six different perspective examples and will highlight scenarios such as initial product entry points, growth options, and assisting diverse stakeholders with challenges that may not be readily visible to those stakeholders. This paper is not designed as a technical how-to or a step by step feature review. It is designed to showcase best practices and focus stakeholders on understanding how to get the most business value from Project Server 2010.

The Perspectives

This white paper contains six viewpoints, perspectives that serve as an analysis -- a case study if you will -- related to how AND why Microsoft Project 2010 is being selected, implemented and leveraged to meet corporate business needs. These perspectives are developed from information realized since the new 2010 version release in May 2010, and will help readers gain valuable insight whether you are looking to buy, deploy, or serve as the provider of Project 2010 solutions.

Perspective 1. Microsoft Project 2010 Points of Entry and Scalability: Planned and Organic Growth of Technology and Process Systems
Perspective 2. Know Your PMO: How Stakeholder Classes are Influencing the Project 2010 Decisions
Perspective 3. Roles Played During Project 2010 Acquisition: Views from a Client, Partner and Microsoft
Perspective 4. Ease of implementation and leveragability of Project 2010
Perspective 5. Decision threats - What may cause road-blocks or resistance to executing a decision regarding the solution?
Perspective 6. Challenges and Critical Assumptions Related to Project 2010

Each perspective includes a situation, with a set of common challenges and key steps to 'capture the win' in the face of the challenges at the end of the respective segment.

Perspective 1 - Project 2010 Points of Entry and Scalability: Planned and Organic Growth of Technology and Process Systems

Abstract: *This section covers Points of Entry (POE) & Stakeholder Classes – it highlights the scalability up or down, based on the POE for Project 2010. It is divided into two parts:*

i. *Addressing the need by customer (decision maker or stakeholder) role (essentially POE)*
ii. *Business case study examples with 2010 customers and scalability challenges, questions and resolution choices*

Recent trends are showing that organizations are adopting a culture of 'joint decisions' to improve the collaborative effectiveness of business decision making. This means that decision-makers from multiple stakeholder classes have visibility of status and actions across parts or the whole organization viewing metrics from project, program and perhaps even portfolio management. However, we believe that 'joint decisions' is not necessarily a developed 'target' for a PPM culture, but rather the environment and DNA inherent to every organization contains joint decisions.

Within an organization, the culture can vary from high-functioning to just trying to survive. We have learned that the state of these groups do not consistently correspond with the business demands. What this means is that a high-functioning team may be part of legacy systems, while those trying to survive are doing so with a new product or direction the organization is taking. Thus, we often find that groups performing very efficiently may not be the first to adopt new tools like Project 2010. So, when working with an organization that is adopting Project 2010 (in a department or division), the path of growth may not be as clear as we expect.

1. **The identification of responding and driving the needs of business users (identifying the POE and path of growth):**
   Often the introduction of a new solution is either based on frustration, incompetence or outgrowing current platforms. Indeed, there are many instances where there is an actual business case and defined needs identified. This can provide a POE at a higher level of the organization as executives look for different options to solve the organization's growing pains. Or the POE may come from organizational growth and implementation of a proper Program Management or possible Project Management Office (PMO). These managers may experience the need for a more holistic tool that grants them visibility at a different tactical level, requiring different analytics and metrics. This POE is also often supported by a business case.

However, Project 2010 will most probably be introduced as an upgrade from a previous version, or replacing a previous product (non-Microsoft). This scenario can open the door for introduction of Project 2010 at the level of the information worker. They reside at the departmental level, where a group, team or class of stakeholders requires the capabilities to map and track work against budgets and time. Also, Project 2010 has the power to appeal to more departments that are non-IT. Historically, the IT department was tasked with sourcing a technology that would meet business users' needs. Project 2010 is exposing business users throughout the organization to the platform's capabilities and these stakeholders are identifying emerging and immediate needs, albeit different from the others, for this solution.

1.1. Adhocracies, islands of excellence and first available

1.1.1. Varying stakeholder needs: More and more organizations are considering and approving capital expenses and process changes based on business cases. This practice is not necessarily new per se, but has become more polarized with the recent economic impacts, environment, and results. That means organizations are initiating changes to counter-act these external forces. Many times this results in the sun-setting of some products, along with the launch of others. These actions usually will create a vortex for 'pork' to be added on --- call them corporate ear marks. Since the organization is launching this new product, often new technologies, training, and hiring (just to name a few examples) are tied to the products overhead. If the business case is not vetted and validated with multiple levels of the organization, quick and ill-informed decisions on lesser solutions may be made to 'plug' the immediate hole, or from unseen personal or political partnerships, despite application to high-functioning, well performing 'islands of excellence' within departments. One thing that is proving true is that Project 2010 is getting another look from varied stakeholders, even if there isn't a corporate approval yet. These POEs cannot be ignored, especially as they lead to identification of the needs of the PPM culture and identification of growth paths for the organization.

1.2. The emerging stakeholder -- The PMO's primary AND secondary stakeholders

1.2.1. Internal/external organizational changes: Organizations are making significant reinvestments in their internal/external supplier and consumer relationships. This (should) include the rework of any information systems that are difficult to extract information from, challenging or near impossible to maintain, or just plain archaic. Organizational "remodeling" should consider the enterprise as a whole and not just one or two departments. Including the PMO as a stakeholder in these decisions will be the POE for further development of the PPM environment, identifying growth needs from the Project 2010 solution – perhaps upgrading to Project Server from sole desktop utilization, etc.

1.2.2. Emerging markets: The economy is creating buckets of market maturities, for example stable markets prove to support a number of business efforts, but may return smaller results albeit with reduced risk. Conversely, volatile markets pose the highest risks, but may deliver substantial results.

Emerging markets are also somewhat volatile, but possess some level of stability and history to support a business culture. Looking across the PPM landscape, Project 2010 can approach corporate penetration modeling economic scenarios. There are stabile organizations that possess all the fundamental elements to acquire, deploy and sustain Project 2010. There are volatile organizations that are realizing the impacts (positively or negatively) by the economic markets. They may be newer organizations hitting increasing growth curves or a stabile organization realizing the effects of significant reduction in sales or market pressures. These corporate economic environments present opportunities for Project 2010. This is the 'pull' created requiring technology and related change that emerging, volatile and even stable organizations are looking for. Stabile organizations may react quicker to positive results by their emerging organization rivals (or peers). Looking to not be continually left behind, even stabile organizations may opt to make selection choices faster than normal (Chrysler LLC and Sears, for example).

2. Real world business case: a large public utility organization serving in the energy industry:

2.1. The organization in this example is looking to acquire PPM technologies, but has diverse PPM requirements for their different departments. Each department has its own budget and steering team to select the appropriate technology. Although the departments have some level of business interaction, they are each tasked with process improvement and managing independent budgets. The organization at the administration level is also looking to secure a portfolio system to manage costs, improve use of internal and external resources and meet requirements set by the government.

2.2. The organization already practices a number of projects and program management processes and uses a third party product for cost management and intends to continue its usage of this product. They have various time keeping systems and are required to use external vendors to take on some of the workload as per a union contractual agreement.

2.3. Assumptions from the organization:

- Adopting a scheduling technology will improve resource capacity planning and forecasting
- All users in the departments will leverage and find value using the new technology
- Data in the costing system and other systems will integrate with Project 2010 through simple programming queries

- One of the main components missing from establishing a robust PPM environment is the technology

3. Common Challenges

3.1. The assumption that data in legacy systems and other planning software is loaded and analyzed as similarly as if it were in Project 2010 is ill placed. This data outside Project 2010 is typically laid out in a grid format, similar to Microsoft Excel. But the line items do not have a relationship or any dynamic updating of actuals versus estimates as that would require substantial programming and still may not be feasible. However, many planning stakeholders use these legacy systems for time-phased purposes, yet lack the ability to perform any what-if scenarios of remaining demand and pending capacity. The gap in how the data functions between systems must be a consideration prior to implementing the Project 2010 solution as architecting the PPM solution may require some additional efforts in programming that the client does not expect.

3.2. The belief that end-users will stop using non-PPM tools, stop their inefficient habits and start using Project 2010 for everything is often not the case. Implementation of any new tools or solution requires organizational development around the change. People are historically resistant to change and rely on conducting business 'the old way' as long as humanly possible. PPM is a relatively new enterprise business solution to those stakeholder classes unfamiliar with the PPM maturity models. It can take some time before the viral adoption grows.

3.3. Organizations often assume that project and program data, integrated with third party costing products and other planning products will automatically roll up nicely to a portfolio view. This is not always the case, depending on the Line of Business (LOB) application, the data architecture and the implementation of the Enterprise Resource Planning (ERP) solution.

4. Key Steps to Creating the Win

4.1. It's not just about the technology, the processes, or the people. Organizational transitions need to look at the people, PPM practices and processes, financial management aspects, technology, and relationships (see Perspective 5 for more on this).

4.2. Determine what the key pain points are, being sure to address the needs of the enterprise business requirements.

4.3. Look for opportunities that will have the most impact, with the least amount of effort (in other words the low hanging fruit). Tackling easier issues and seeing some quick results builds confidence in the solution and provides for greater adoption through viral growth (good news gets around)

4.4. Conversely, be careful to avoid high-cost low-return initiatives, as these will "cost you" (literally). No one seems to remember all the good things you have done, when that one piece of bad press hits.

Perspective 2 - Know Your PMO: How Stakeholder Classes are influencing decisions regarding Project 2010

***Abstract**: This section focuses on the role-based decisions (the 'must-haves') – and covers what a functional role/decision-maker needs and/or uses to select the right tool. There are two key sections:*

i. *Internal and external to a PMO/project governance environment*
ii. *Proof of concepts*

The volatility of an organization's culture is now more prevalent than previously anticipated. Due to the global economic changes during the 2008-2010 time periods, a number of external factors have impacted the ability of organizations of various sizes to select and adopt updated technology. Large, mature organizations functioning in stable markets and planning their penetration into emerging markets have found their stable situation turn turbulent. Small and mid-sized organizations typically had the advantages of agility and creativity. Energy and naivety are now facing additional challenges of the ability to make good informed decisions while meeting the needs of their key stakeholders.

This current economic situation that organizations globally are facing indeed is a short duration 'dip' in their processes execution. Organizations of various sizes, locations and markets will dip into uncertainly throughout their business cycles, and they normally will not stay trapped in the vortex of uncertainty. As each organization climbs out of the uncertainly to a level of stability (albeit perhaps still turbulent), a trend is typically followed in that a stakeholder class or classes are leading the changes. Often the IT departments propose alternative options for managing the metadata and supporting end-users. But IT Departments are normally costs centers within an organization. Thus, it is in fact a specific type of end-user that leads the change. Picture IT as the basis for supporting what organizations need. It is those stakeholder representatives, or roles within an organization, that are the face of the change. Perhaps it is Human Resources (HR) that is tasked with recruiting and maintaining specific skill groups and talent levels to meet the needs of department and corporate objectives. Another example may be an operational division that is constrained by its customer/consumer base, but needs to find alternative ways to fulfill work orders with a workforce that is more metrics-style and presumably facing increasing work demands.

There is stakeholder demands that are not determinable based on historic analysis of a PPM environment. The demands for work management and cost controls have been pushed down and disseminated across the entire enterprise. Past tool versions and PPM deployments would set up the team users to provide input and have limited contribution of work and time-phased updates. An effective PMO will need to

account for stakeholders who have little understanding of the structures and processes of the PMO. The technical platform will now need to adapt to acquiring interaction with all stakeholders to capture the diverse voices of these stakeholders and factoring them in to decisions on the appropriate tool that can address their varying needs.

1. **Internal and external stakeholders to a PMO/project governance environment:**
   1.1. Stakeholders known and unknown: Project managers and solution/process improvement experts always have the daunting task of identifying and appealing to the varied business users. Solution and change initiatives are always more effective when the users respond and adapt to the changes positively. Now that Project 2010 is a more collaborative business platform, the stakeholder profile and classes may be evolving to primary and secondary scenarios. For example, the requirement to meet end-user needs may not stop at the direct end-user, but extend to that end-user's network. This multiplies the voices of affected stakeholders and potential voices influencing decisions. The Project 2010 experience is now more than a business user experience. It is a gateway to project metadata access and availability to give that end-user the ability to interpret and interact dynamically with the data in order to take informed actions. It is this project intelligence that cascades to the secondary level of business users.
   1.2. Who may be really pulling the strings: As the business world becomes more 'connected' socially, the environment is moving from an 'it's who you know', to a 'who knows who you are, and what you do' position. Business initiatives and project approvals mainly are based on visible, quantifiable information and analysis. Often what benefits one stakeholder group inevitably will benefit other groups as well. Ideally, organizations will realize much more value from technology and process investments if they can expose them to more parts of the organization. It is like project stem cells - project data ready to grow to something unique and useful.

2. **Proof of Concepts (POCs)**
   2.1. POC ideology: A POC (or pilot project) is an opportunity to demonstrate the capabilities of a new approach or solution in a small organizational area and in a controlled manner. A POC is an excellent risk mitigation strategy for an agency planning to implement a new system. It can also serve to inform or resolve an alternatives analysis during the investment planning phase. The pilot helps determine whether the solution is appropriate and how easily it can be configured and provides a hands-on experience for IT personnel and end-users.
   2.2. How to manage the POC to obtain the value: For full-scale implementation, a POC should be carefully designed and evaluated. If the scope of the POC is too narrow, the pilot runs the risk of not having a sufficient basis to be useful to the end-users. On the other hand, if the pilot scope becomes too large, or the timescale too long, then the decision making process becomes too

drawn out, and the business continues to suffer for lack of the much needed solution that the POC is attempting to model.

2.3. POCs are a great way to involve a small dissection of diverse stakeholder class representatives. The organization can use this to its advantage in creating internal 'champions' for the proposed solution, as they have touched it and seen its capabilities. But again, careful attention should be paid to the design to ensure this does not backfire and create internal adversaries for the proposed tool.

Activities related to POC projects can be divided into three distinct phases:

Preliminary:

- Define the purpose, goals, objectives, and scope of the POC pilot demonstration project
- Establish the success criteria for the POC pilot, with input from all stakeholders, technical staff, records management staff, and users
- Outline the benefits of conducting a POC pilot, and risks of not doing so
- Establish an administrative infrastructure to support and guide POC pilot project activities

Conduct the POC pilot:

- Determine whether preliminary decisions and assumptions made regarding hardware and software performance, as well as service level required by technical staff, were accurate
- Develop and use tools facilitating documentation, communication and knowledge transfer, and metadata process utilization

Test and evaluation:

- Assess hardware and software, system and database design, along with procedures (for training, scheduling, system management, and maintenance)
- Test product(s) in dissimilar locations for functionality, usability, and benefits derived from using PPM
- Validate requirements and performance expectations

3. Common Challenges

3.1. If it worked in the POC it should scale to the enterprise. Roll out of the POC instance requires diligent evaluation of scalability issues. Remember that the POC is purposely smaller in scale and controlled.

3.2. Patience is often short when the client is anxious to see the solution in action on a full scale. The question is often asked: The pilot only took a month, why is it taking so long to get everyone enterprise- or department-wide up on to the system?

3.3. Security issues can be prevalent especially in heavily regulated industries. The need to control who gets access to the data in the new system is a valid concern, but can lead to overkill and disappointment in not seeing the full functionality of the solution – in other words, why did we just spend 2 years putting this online, if we are going to "lock up" the data?

3.4. Let's take an Agile approach to managing our enterprise PPM deployment (that methodology may work for software development, however we don't believe that approach would work for deploying an ERP or Customer Relationship Management (CRM) system either). You are going to need a good plan, experienced resources, and some time to ensure a successful PPM system deployment. Since PPM is best deployed enterprise-wide for the largest ROI, adequate planning is essential. Sprinting is not recommended.

3.5. We can do this deployment ourselves (e.g. have you deployed a PPM solution before?) Experience of PPM partners has shown it's different than other more mainstream or more commonly used systems, such as Microsoft Exchange or even SharePoint Server. Project 2010 requires the business users use cases, configuration and stakeholder adoption plans at a minimal to even have a chance for successfully deployment. Similar to a proven Project Management approach and methodology, use of historical data, lessons learned as well as requirements planning are the tenants of an effective PPM environment.

4. Key Steps to Create the Win

4.1. Utilize a POC approach only if it makes sense. There is no need to conduct this stage if you already have a well understood strategy and need to get on with the deployment.

4.2. Ensure that all of the stakeholders are clearly identified, on board with, and engaged in the new solution. You can be months (or years) down the road, only to discover that you forgot to include the finance folks, or the HR team, or the training department. Stakeholders can be your greatest allies in garnering departmental resources when deploying your solution. Again, don't miss out on the opportunity to create internal 'champions' for the deployment.

4.3. Have regular stakeholder communication meetings to keep everyone informed, address objections, and answer any questions. Remember that adults learn on the basis of understanding, before you can attain buy-in and commitment (ownership).

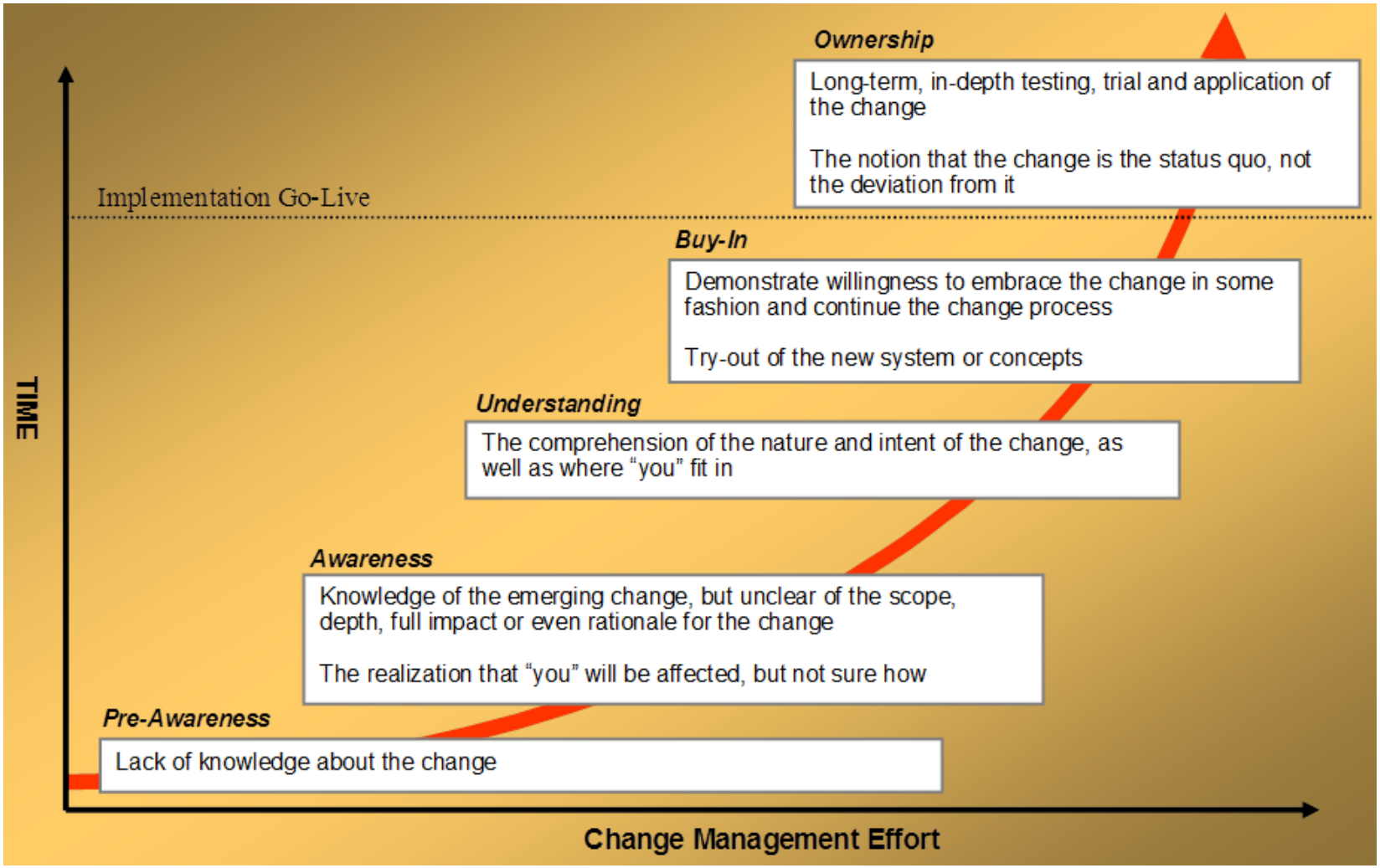


Figure 2: Change Management

4.4. Ensure that the stakeholders are agreed on a common purpose (e.g., Strategic Alignment [1] including: Long Range Intention, Goal Set, Metrics, and Strategies might be a good place to start).

4.5. Change is hard … especially when it is being imposed. Manage the initiative as you would any large project where you expect to get a good return on that investment (e.g., excellent sponsorship, great communications, risk and issue management in a timely manner, and ensure that you are working with the best people, both internally and externally).

[1] Executing Your Strategy: How to Break It Down and Get It Done, Mark Morgan
http://hbr.org/product/executing-your-strategy-how-to-break-it-down-and-g/an/9564-HBK-ENG?Ntt=Mark+Morgan

Perspective 3 - Roles Played During Project 2010 Acquisition: Views from a Microsoft, Partner, & Consumer

***Abstract**: This section outlines various perspectives of the PPM acquisition process from provider to consumer where end users will be adopting PPM, and leveraging technology solutions and processes. The perspectives will be based on the three types of primary stakeholders that play a role in the PPM supply chain:*

i. Microsoft
ii. The Partner
iii. The Consumer

Change occurs only when the environment becomes turbulent. Emerging global markets are realizing the growth trends because of an in-balance. This flux pushes people out of their comfort zone. When the environment moves away from status quo, innovation, updating and eventually change takes root.

Consumers of Project 2010 ultimately are looking for solutions that are sustainable and facilitate the blending of corporate political sophistication with the ability to analyze, select and deliver initiatives against strategic objectives. Many times this is a dichotomy situation where the consumer is aspiring to obtain a complete technology package while ensuring the ability for quick adoption. As the global economic market presents organizations of various sizes and locations with challenges, these organizations are quicker to review newer and alternative technology options to support their PPM and PMO. This is a great trend for products just released, such as Project 2010. The customer contact with the new technology is showing a sudden shift upward in interest, but is that really indicative of the selection and deployment actions that will follow?

Customers are looking to acquire the new technology, but are still doing so in an iterative fashion. Past steps for acquiring and/or upgrading PPM technology followed an initial pilot, then an expanded pilot followed by an organization-wide roll out. Often the technology deployment coordinated with PMO objectives, so a typical lifecycle of updating technology and expanding the PMO ranged anywhere from 2-5 years on average. The new Project 2010 release has augmented these steps, adopting an approach normally found in IT and product development environments.

The PPM Supply Chain

To provide an overall high level understanding of what it is we are all trying to do; here is a brief overview of the PPM "supply chain". This is a view from each of the key stakeholders and their native roles that ensures clarity in what is expected from each stakeholder for a successful PPM. In addition to establishing

a level of clarity and understanding for each PPM supply chain stakeholder, we added some thoughts on the challenges and opportunities that we collectively are now beginning to address:

The Vendor (Microsoft): Software Products

- The Vendor identifies critical needs and responds to the market to solve those critical needs using technology
- Microsoft, in close collaboration with the PPM community, creates the strategic vision and direction for knowledge workers and develops a product roadmap for product development
- The products are then developed (e.g., Office, SharePoint, Project, Project Server, Visio, etc.)
- The Business Marketing Organization develops the marketing program for the product suite
- The regional-based sales teams provide the pre-sales support, helps the customer understand the product set, and engages the appropriate level of partner support for the initiative
- The Vendor manages the interactive relationship between the product, partner, and customer through the sales cycle
- The Vendor provides product technical support and validation through its Premier Support division
- The Vendor is responsible for Customer Partner Experience (CPE) satisfaction

The Partner: Program, Project, and Portfolio Management Solutions/Consulting Services

- Microsoft qualified PPM competent partners deliver professional best practices-based program, project, and portfolio management consulting services
- Partners have a deep understanding of the holistic approach of project, program, and portfolio management, including people, technology, methodologies ,and processes that allow implementation of the best solutions available to match a customer's needs
- The Partner works closely with Microsoft and the customer to determine the customer's business requirements, architects a solution, deploys the technology, trains the end-users, and manages the customer engagement to provide a successful solution that meets the customer needs and expectations

The Consumer: Utilizes Business Solutions to Support the Needs of Their Internal and External Customers

- The Consumer provides the understanding of the organization's long-range business purpose, goal and metric-set, strategies, and priorities of the business
- The Consumer sponsors the PPM initiative at the executive, operational, IT, and business department levels
- The Consumer works closely with the partner to define the specific business requirements, deployment and training schedule, and ongoing maintenance and support of the PPM solution

- The Consumer assumes responsibility for the ongoing support of the delivered solution. Note: this might also be a contracted component

Many readers may find the previous section of stakeholder roles to be remedial or perhaps even lacking value. However, there are critical issues and challenges as well as substantial wins when PPM champions completely understand and leverage the PPM supply chain appropriately. Often there are blurred lines between who does what in the PPM supply chain. One overall PPM best practice is for business leaders to enforce adhesions to each PPM supply chain's stakeholder position and responsibility. If each PPM supply chain stakeholder delivers to their expectation, the PPM initiative is set up for huge success.

Challenges & Opportunities

Now that we have a better understanding of the PPM Supply Chain, let's take a look at 1) some of the significant challenges that might be limiting our ability to produce quantum leaps in performance, and 2) consider some potential opportunities that we have to turn these challenges into success:

1. **Common Challenges**
   - 1.1. Most work in organizations are organized inefficiently, around specialists employed in what Hammer and Champy[2] call "functional silos". This architecture can be very limiting to enterprise-wide collaboration efforts and visibility in to all project work and results.
   - 1.2. A large number of enterprises lack integrated information systems. The 1990's model of acquiring "Best of Breed" solutions and connecting them together to provide and end-to-end view of the organization's data have largely failed.
   - 1.3. Disconnected Excel and PowerPoint is by large the most common method of information gathering and reporting in use today, with no integrated or dynamic reporting mechanism.
   - 1.4. All too often we turn our attention to problem solving, which is not only not enjoyable, but yields little in the way of significant results … and the problems never seem to end. This "firefighting" mode creates internal morale issues and forces organizations to be in a reactive stance rather than the preferred proactive stance.
   - 1.5. Organizations that recognize the need for a new integrated solution either lack the internal competence or resources to make the change (this includes both the private and public sector).
   - 1.6. Most reengineering efforts fail to achieve any results and they fail primarily because people resist them and the organization failed to adequately develop a plan for the full roll-out to the enterprise.
   - 1.7. Until recently, there were a number of failed attempts to provide both a technical and methodological solution. Often these two pieces, integral to effective PPM, have been disjointed.

[2] Reengineering the Corporation: A Manifesto for Business Revolution
http://www.businessweek.com/archives/1993/b33209.arc.htm

That is why it is important to seek a qualified partner experienced at delivering an end-to-end solution ensuring the technology platform is configured to support the methodology.

2. Key Steps to Create the Win

2.1. A proactive approach is that there are no *threats* (only opportunities), unless –organizational culture is such that a negative perception is allowed to take over and everything encountered is viewed in that way. Critical thought must come first before panic. This may be a good time to set aside that react-mode email stream and put the "thinking cap on". What is the root cause behind all these emails? Is my enterprise system failing to channel the communication? Do I even have an enterprise system, or is it more often the case that I have a number of independent, disconnected enterprise systems that need to be totally replaced? After all, just how many spreadsheets and PowerPoint presentations does it take to run a business of this size?

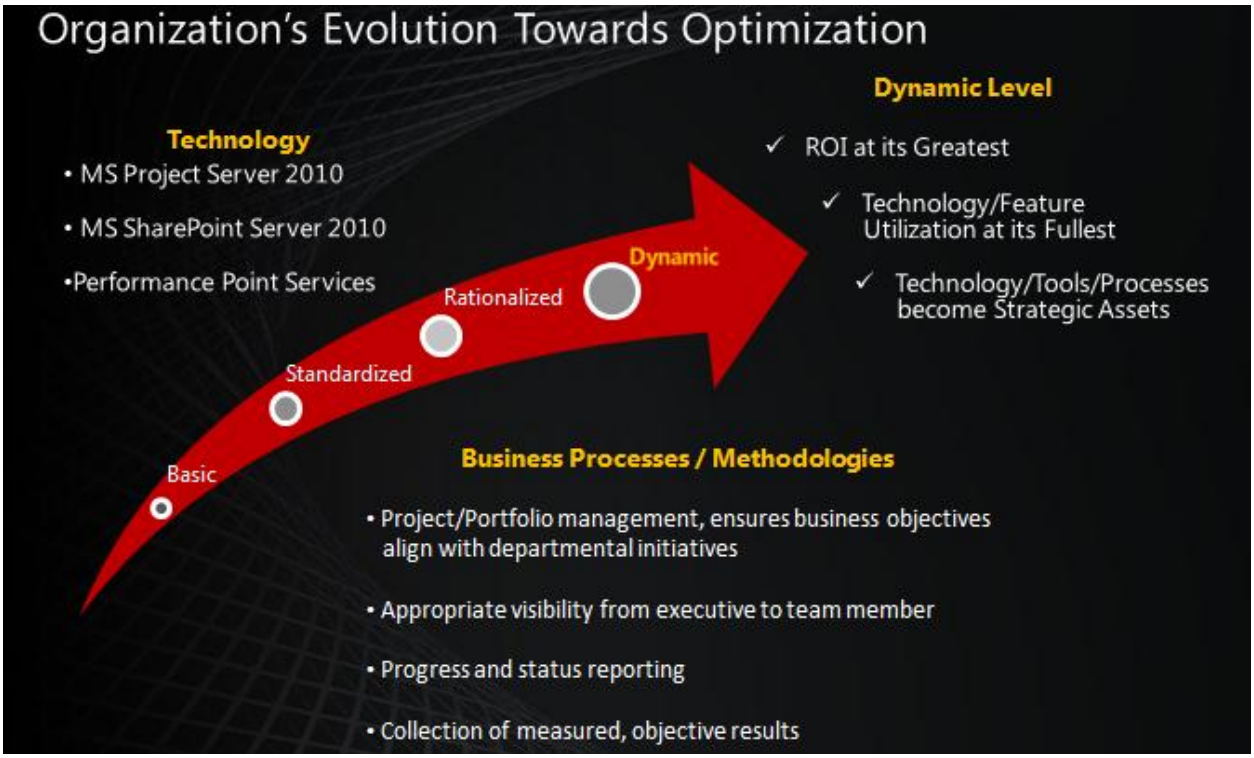
2.2. There is a complete body of knowledge on "appreciative inquiry[3]", albeit too much to address within this paper, but the short version simply stated says "search for the best in people, their organizations, and the relevant world around them". Look at the things you do well, and do more of it!

2.3. The downturn in the economy is forcing organizations to better understand how to do more with less. What was an important issue at the turn of the century has become a critical business imperative in the second decade of the 21st Century. Our very jobs and careers are now dependent on identifying and deploying a new means of managing our work, our resources, and our time. The tool is essential is assisting to building in efficiencies and automations to drive results in less time, with less resources. Microsoft realized this trend and revamped Project 2010 enable items, such as workflow and business process execution, within the basic uses of the tool.

2.4. Users are getting better at identifying and using technology to expose relevant information to make decisions. As trends of business needs are forecasting, enterprise PPM solutions will be more widely adopted in organizations by the end of this decade.

2.5. Project 2010 introduces a new level of PPM capability to the enterprise to address the critical information needs of the IT and business users. Project 2010 supplies a full enterprise-wide technical platform to support all the aspect of PPM, while enabling an organization to address current pain points and build momentum for growth.

[3] Appreciative Inquiry Commons http://appreciativeinquiry.case.edu/intro/whatisai.cfm

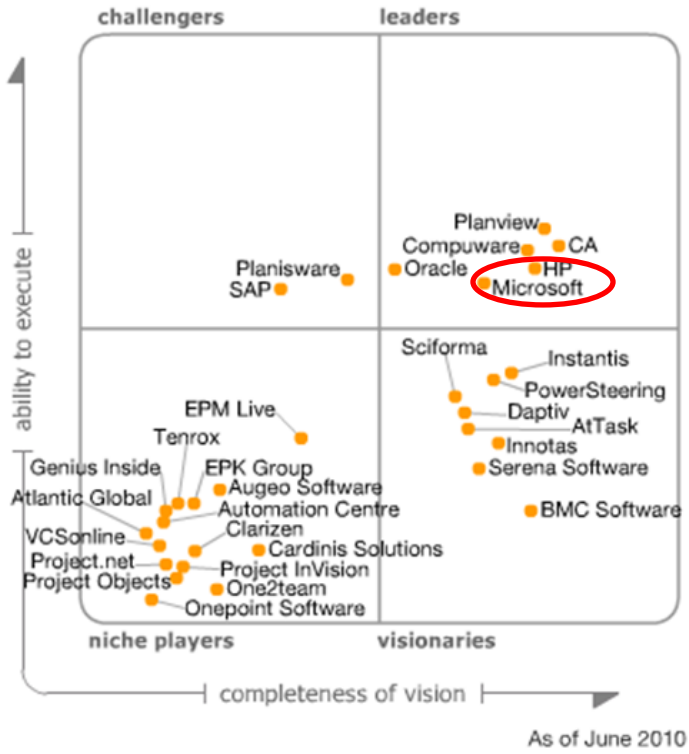


Perspective 4 - Ease of implementation and leveragability of Project 2010*:*

Abstract*: This section outlines the ease of implementation and leveragability of Project 2010 (view from integration and adoption).*

Microsoft has taken major steps to improving the implementation of both Project and SharePoint Server so organizations will immediately benefit from ease of use, as well as requiring less steps. That means users will be leveraging the technology faster than ever and be able to access more features and capabilities by a wider audience. Thus, the technical deployment is less of a factor than in previous versions. Now that Project 2010 is an embedded application within SharePoint Server 2010, PPM metadata natively resides in a collaboration platform. By adding the collaborative mechanisms of SharePoint Server, Microsoft has brought Project 2010 into a new leadership position of supporting well rounded, highly functional PPM capabilities within one integrated tool.

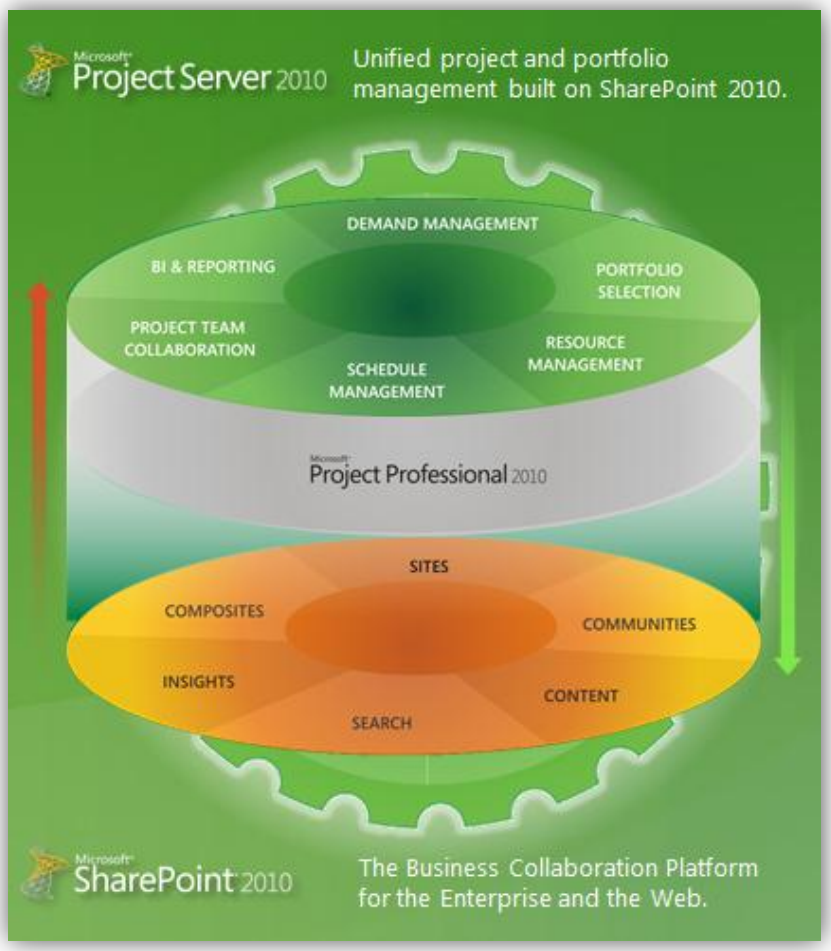
It is, AND it is not, about the technology … Microsoft's integrated PPM solution leverages the world's fastest growing collaboration technology infrastructure, SharePoint. Microsoft Project 2010 provides an end-to-end capability, which eases implementation hurdles typically associated with other competitive solutions. Project 2010's extensibility with other LOB applications eliminates the need for a lot of third party applications to fill in gaps. Streamlining this also reduces the points of failure that can be present with third party application POEs.



Gartner's Magic Quadrant for IT Project and Portfolio Management[4] illustrates the relatively small number of leaders currently delivering PPM solutions to the marketplace. Microsoft has made significant progress in this quadrant with the introduction of the Project 2010 solution this year.

Project Server 2010[5] is built on the SharePoint Server 2010[6] platform, and combines powerful business collaboration services with structured execution capabilities to provide flexible work management solutions.

[4] http://www.gartner.com/technology/media-products/reprints/microsoft/vol10/article12/article12.html
[5] Microsoft Project Server 2010
http://www.microsoft.com/project/en/us/project-server-2010-new-features.aspx
[6] Microsoft SharePoint 2010
http://sharepoint.microsoft.com/en-us/Pages/default.aspx



Project Server 2010, at heart, is a scheduling engine and is a great tool for managing projects of all types across an enterprise. It also includes some great portfolio management capabilities and can help you gain ROI from business need and value assessment, all the way through execution.

In addition to native capabilities of PPM, Project 2010 also provides deep integration with Team Foundation Server 2010, an Application Lifecycle Management (ALM)[7] solution for helping manage the software development process. Together they make a great solution for managing your IT investments.

[7] Application Lifecycle Management (ALM) is a continuous process of managing the life of an application through governance, development and maintenance. ALM is the marriage of business management to software engineering made possible by tools that facilitate and integrate requirements management, architecture, coding, testing, tracking, and release management. From Wikipedia http://en.wikipedia.org/wiki/Application_lifecycle_management

It IS however, all about the ability to properly *assimilate* the technology into the organization. The two key areas that need to be taken into consideration are the rate of adoption and the methods that will support the Project Management (PM) processes:

1. **Adoption**

   There is currently a great deal of churn in the solution marketplace, primarily due to the newness of PPM as an enterprise discipline, versus ERP, Human Resource Information System (HRIS), or CRM), whose organizational maturity and adoption tends to be higher. Much of the controversy around maturity models stems from a mismatch between the amount and type of processes applied at each level and the organization's basic cultural mental model (regardless if it is of a volatile market, stable market or turbulent market). With the mindset taken into account first, we hope to aid organizations moving along the maturity scale to their desired level as quickly as possible. But it is a process. PPM is not an out of the box solution and it is most successful when deployed in accordance with detailed planning.

   Organizations in stable markets might consider choosing a prepackaged method from a reputable partner. This decision could offer a number of benefits. First, it would supply a fully developed procedural offering that would make the transition to Level 2 (See Gartner's Maturity Model for PPM diagram on the next page) easier. Second, it might reduce the tendencies to go overboard with too much process, especially at once. If the organization decides that tools are as important or more important than process, stable-industry organizations might consider purchasing tools that come prepackaged with a methodology to aid in establishing consistency and developing a deep understanding of how these processes drive and impact organizational (structure, approval chain, project team development, etc.) and business (choosing the most appropriate projects, identifying strategic goals, selection of tools and technology, etc.) decisions.

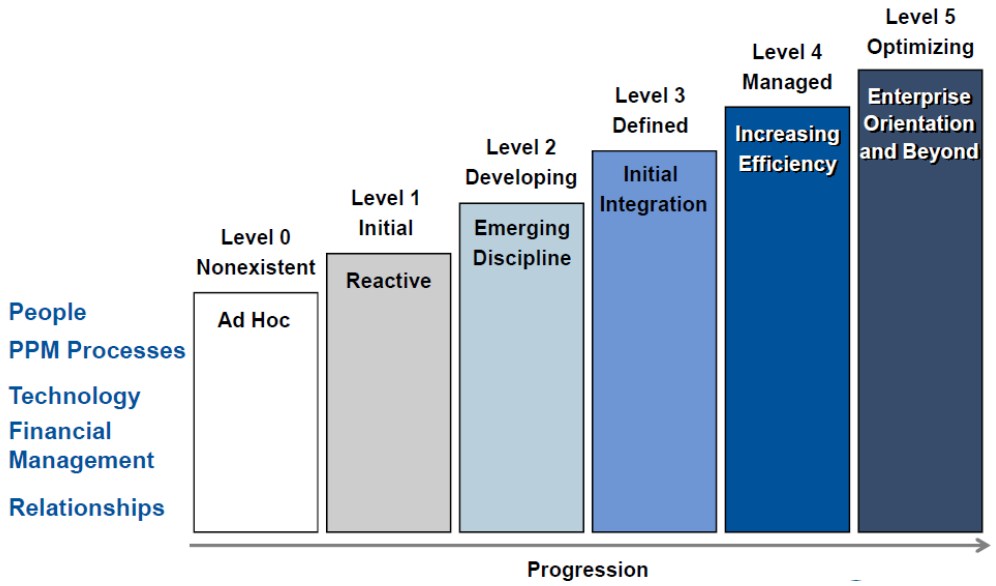


Figure 3 Gartner's Maturity Model for PPM

-

Gartner's Maturity Model for PPM outlines five core dimensions across six progressive levels that are of critical importance in PPM[8]:

1) **People** - are the most critical part of any project- or program-centric endeavor. The interdependency among people in terms of their availability, their skills, their contribution to the work that needs to be done, and their career aspirations is of critical importance. At higher levels of maturity, the leadership ability of the individuals involved in supporting PPM activities becomes critical.
2) **PPM practices and processes** - PPM processes comprise activities such as portfolio management, and program management, as well as classic project management processes, such as risk and resource management. One of the most common practices is the establishment of a PMO to facilitate integration and execution of these practices and processes.
3) **Financial management** - Financial systems that might be adequate when projects are paid for as part of a lump sum in the budget (a common Level 1 practice) become completely inadequate when forced to support a more detailed look at multiple projects and programs. Effective financial management requires chargeback or allocation systems, as well as new mechanisms for tracking value.

[8] Gartner ITScore Overview for Program and Portfolio Management
http://www.gartner.com/DisplayDocument?doc_cd=205800&ref=g_rss

4) **Technology** - The requirements for technology evolve as the various PPM processes change as organizations move through the levels of maturity. Additionally, PPM processes often require a unique set of tools to adequately fulfill their business functions. Everything from collaboration tools to project accounting systems will generally be required at some point on the journey upward toward high levels of maturity.
5) **Relationships** - Organizations must identify the touch points necessary to maintain the processes outlined above. This includes identifying who needs to be informed, who needs to be consulted and whose help is mandatory to ensure that the desired processes work effectively.

2. Methodology versus technical installation

Ease of technical deployment is only one key aspect to consider. Project lifecycles are more easily defined and introduced within organizations when the technology works as intended and is easy to use.

2.1. Ease of use leads to viral adoption which increases the overall potential for establishing an enterprise system for managing an organization's portfolio of projects.

2.2. The greater one's familiarity is with project phases and stakeholders, the more easily one can keep the project on track and on budget. Below is a sample technical project life-cycle[9]. (Figure 4)

[9] Example Technical Project Life-Cycle, Courtesy Advisicon, Inc.

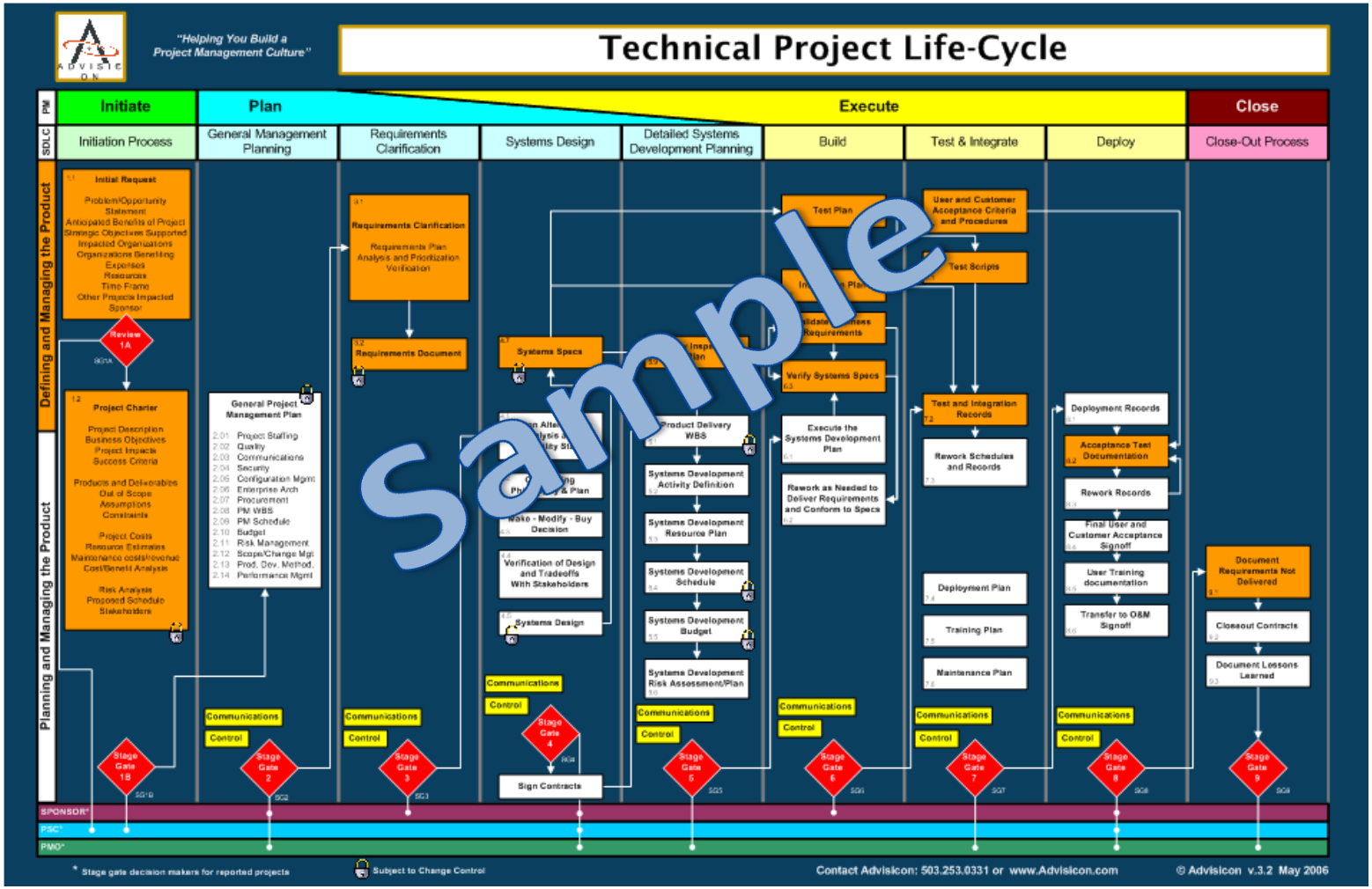


Figure 4 - Example of a Technical Project Life-Cycle

2.3. To make sound project management choices, individuals must understand what a project life-cycle is and what factors can influence it. The life-cycle is a core component to managing projects successfully, identifying project status data across the enterprise for executing well informed decisions, and building efficiencies in managing multiple projects within an organization.

2.4. You need to be able to properly define and manage project phases and recognize the differences between project and product life cycles.

2.5. It is also important to understand how to identify, and factor in, how project stakeholders can affect projects.

2.6. When users are presented with a new technology, a number of factors influence their decision about how and when they will use it[10]:

I. Perceived usefulness – this is defined as the degree to which a person believes that using a particular system would enhance his or her job performance.

II. Perceived ease-of-use – this is defined as the degree to which a person believes that using a particular system would be free from effort.

[10] Technology Acceptance Model http://en.wikipedia.org/wiki/Technology_acceptance_model

3. **Common Challenges**
   3.1. An organization adopts the belief that they can deploy this solution themselves, either because they feel that they can do it, or they cannot get the financial commitment for partner services. Either way, this approach will greatly increase the risk to the initiative and to the organization. Because PPM encompasses technology WITH processes and affects organizational culture, expertise in architecting and configuring the appropriate solution that matches an organization's current status, while allowing for growth, is crucial.
   3.2. It's not simply about the technology. There is always an organizational change component to the deployment of any PPM solution that cannot be overlooked. Even the smallest change for people is difficult and often resisted.
   3.3. The mentality of "I already have Project on the desktop, how hard can it be to just save my files to the server?" can undermine building the firm foundation to support organization and departmental growth. PPM is bigger than just the project level.
   3.4. Thoughts of "I wish we had thought of that when we originally deployed the system" (e.g. considering all five core dimensions that Gartner calls-out in their Maturity Model when you establish the system requirements). Partners understand how to solve the current pain points, but also know what to account for in future growth, within the organization and the technology.
   3.5. Expectations that all PPM solutions are similar, so cost is really the only decision factor is dangerous. Microsoft has made significant progress with the introduction of the new Project 2010 solution. This solution is the only PPM solution in the market today that is fully integrated with Office and other Line of Business (LOB) applications such as Dynamics and Team Foundation Server just to name a few. Although cost may potentially be higher when creating a well-rounded solution, the ROI and adoption is much quicker when the solution is built to integrate with the systems people already and already accounts for needs, reducing the need for multiple third party add-ons.

4. **Key Steps**
   4.1. Utilize a Microsoft certified PPM partner for the planning, deployment, and training of the PPM solution. They have proven expertise to lead an organization through all aspect of implementing a PPM solution. The cost in the long run will be lower, the end-users will be extremely satisfied with their new system, and the organization will have comfort in astute guidance into unfamiliar territory.. In-house deployments are high-risk, almost always take longer, do not take full advantage of the tool therefore hindering ROI, and often end up as total failures.
   4.2. It is imperative to ensure that technical support personnel, the PMO team, and end-users all receive the requisite training. This includes the appropriate soft and hard skills for managing critical aspects of project, programs, and portfolios (e.g., communication training, as well as how-

to knowledge transfer for using the tool). The Project Management Institute (PMI) [11] has a number of professional certifications for project and program managers, risk management specialists, scheduling management specialists, etc., as well as Microsoft who has multiple certification at the individual and organizational level, ensuring that partners have the requisite skill set to engage in this type of solution delivery.

4.3. Identify the key organizational touch points necessary to maintain the enterprises processes, required to support a PPM initiative. People do not like to feel left out of the loop or surprised. Appropriate and efficient communication is a must. This means getting the right information to the right people at the right time in the right format.

4.4. Make sure that key individuals understand what a project life cycle is and what factors can influence it. Creating these internal 'champions' will assist in growing adoption across the enterprise. It is smart to create these experts that can assist people as they already know them and trust them.

4.5. Consider the bigger picture … from collaboration tools to LOB systems. Enterprise PPM encompasses a broad set of capabilities that affects a number of other areas in the enterprise. When applied correctly, PPM truly reaches across the enterprise granting visibility of initiatives and ensuring benefit of supporting business objectives.

[11] The Project Management Institute (PMI) http://www.pmi.org

Perspective 5 - Decision threats and cultural change: What may cause road-blocks or resistance to deciding on the solution?

Abstract: *This perspective covers threats to effective decision-making, including potential road-blocks or resistance to deciding on the solution. There are 3 key aspects covered:*

i. *Potential Blind spots*
ii. *Social/Personal networks*
iii. *Facts and opinions (blog's, research, professional associations)*

If organizations attempt to push such changes too fast or too far, they often encounter cultural conflicts and wholesale rejection by all the concerned parties. The PPM Maturity Model is intended to help senior management avoid such problems by providing a framework that can help facilitate communication with executive management by comparing their organization's PPM processes and attributes to those in the Gartner model.

An organization's PPM initiative may stall at Level 1 PPM maturity; and depending on its culture, Level 2 may pose a harder level to progress to as business units and changes within the organization try to swing from a "just get it done" environment to a more organized process-driven organization. Ultimately, companies looking for ROI from PPM are expect the ad hoc style of project management at Level 1 begins to give way to a more formal project management discipline. Project management initiatives and PPM technology deployments have faced these classic organizational challenges for decades. Typically, there are the stakeholders who are not supportive, while others simply do not understand or validate the benefits. The launch of Project 2010 within SharePoint Server 2010 coincides with the evolution of the socialization of business problems and the virtualization of information. Those stakeholder profiles that would normally be supportive and a captive audience now have a wider and deeper access to information that enables them to ask more informed questions, and work towards making better decisions. Inevitably, those 'supporters' may in fact change to auditors or self-imposed Subject Matter Experts (SME's) of PPM. Conversely, because of the availability of information and the validation of specific types of information by peers, typical stakeholders whose profiles would be a resistor to PPM may in fact be convinced of the value more easily. The key is to read the signs as these stakeholder profiles change, as the decision making world we live in has changed.

Below is a list of findings blending Microsoft research and partner experience:

Finding One: Emerging disciplines --- Organizations are migrating more quickly to and planning to adopt a PPM environment in order to realize the ROI of managed work data, including work governance and alignment of projects with business drivers. There is a growing trend of validation that is beginning to take

root. PPM supports a variety of project and program tracking disciplines, such as Stage Gate (for product development), Application Lifecycle Management (ALM), and PPM (for professional services). Project 2010 is now encompassing additional competencies and disciplines for a PPM environment.

Finding Two: Initial and annuity costs --- Many of the competing products to Microsoft Project 2010 offer competitive licensing options, such as free access to the data in an attempt to secure PMO data within that products environment. However, not known upfront are the longer term costs not just to acquire the technology, but to support the deployment and adoption of the business users. Microsoft makes a strong case for Total Cost of Ownership (TCO) when taking into account the innate extensibility of the technology (integration with other products and augmentation of the technology) as well as the much larger market of qualified partners and venders to support deployment. The Microsoft partner program is a proven model for vetting people and approaches to support a wide variety of business requirements worldwide. Arguably, competing products carry a higher price tag of consulting and training, as well as maintenance fees and support costs when compared to Microsoft. That said, this technology does not support itself, so there is a requirement for ongoing technology and business user support and maintenance required for any PPM technology. The question becomes which solution provides the most scalability to bring the quickest ROI now and with future growth.

Finding Three: Transition from guesstimates to project intelligence --- Many practices worldwide by organizations is to make assumptions or analyze and make determinations of status and look-ahead(s) based on resource planning systems or ad-hoc processes. Typically, many organizations will equate the efforts of resources (amount of work specific to a task) and assign a monetary value to the results. Fiscal planning and corporate financial auditing involves both art and science to summarize the status. Although there are highly complex and comprehensive tools and methodologies to estimate the financial health of organizations, there still is analysis involved. The risk is that unless the estimates and analysis include scheduling algorithms, the delta may be larger than needed. Essentially, if an organization was planning a fixed number of strategic objectives and looking at forecasting requirements (costs, resources, etc.) then a time-phased estimate would also be required. It really comes down to if/then situations, where decision-makers need to identify key events or work packages, assign constraints and create relationships between them. This action of integrating strategic plans from a portfolio and/or ERP system to a PPM system is becoming more essential, and is the inflection point for organizations to transition from coming up with strong guesses and estimates to more quantitative project-based intelligence that can be updated, tracked and adjusted throughout the project and program lifecycles. Over time (fiscal year over year (YoY), organizations will be able to compare actual results historically, or incorporate this data into forecasts.

Recommendations: Analysis, selecting and adopting PPM technologies requires multiple level commitments. This is not to suggest that it is an all or nothing situation. Classic scenarios over time has surfaced that there are those who will embrace and those who will resist. Although those ‘profiles’ still

exist, it is less of a fundamental criteria for an organization to change the hearts and minds of the nay-Sayers or coddle and protect those supporters. Project 2010 and its collaborative capabilities now allows for virtually every role-based profile to be able to adopt, understand and utilize the technology – as it was meant to function. Thus, the threats are less of a matter of creating a one-time full adoption, but more of designing a phased solution that enables organizations to embrace a multi-level environment that enables sociability and knowledge transfer while maintaining PPM governance and structure. Essentially, an environment of project intelligence is created. Regardless of how raw the project metadata is and the technology and path of adoptability allows; the right type of system will help mature the project metadata to an analytical level.

1. Potential Blind Spots

Essentially, the effectiveness and use of technology in a business climate is a two way street --- users have to learn how to the use the tool, and the tool must be configured in a way that a user can use it. Project 2010 with the SharePoint elements and added social and collaborative elements is presenting unique situations, where users are looking to shape and change the technology to more meet their needs, essentially leading to an enabling instance. Years past, Microsoft has marketing the notion that its business products enable users to be more effective. However, in other discussions, the act of 'enabling' takes on a not so positive connotation, almost indicating that external sources can allow bad habits or poor results by employing work-arounds to work the technology rather than letting the technology work – as it was intended.

1.1. Stakeholder profiles are morphing: For years, organizations and external stakeholders (e.g., consultants) have relied on organizational charts, role definitions and other tactical data to use for objective planning, forecasting, recovery and other corporate requirements. Matrix-style hierarchies have added an additional complexity, but were still manageable through visual charts and other tools. These days, more is accomplished through Management by Objectives (MBO) approaches. Indeed, objectives may still be in relation to a specific role or department, but as organizations are looking to increase efficiencies and output through a reduced workforce, the element of skill set, positional visibility and other factors not widely documented are being leveraged. Thus, the 'work' and 'changes' that will occur may or may not be from those sources expected.

What is happening more and more is that organizations are changing personnel, strategic objectives are under more scrutiny, and results are happening unexpectedly creating some level of havoc and forcing both internal and external business users to chase these threads beyond the tools and visuals already available. In one real world example, an organization was looking to select a project lifecycle tool, using Project Desktop 2010 and SharePoint. After deliberate planning, the roll-out was compromised due to an undocumented customer (external force) that

wound up playing more of a critical part in the roll-out and structure of the system. Essentially, this unforeseen stakeholder represented a set of compliance and regulation requirements not initially defined or understood. This created a new set of rules and requirements not only for the system, but the executive team.

Indeed, it was not a failure of planning for scope definition, but rather a realization of the potential capabilities of Project 2010 and SharePoint 2010, and the options to replace other systems and take on additional business functions that led to this dramatic change. Thus, the profile morphed due to the actual deployment of the system.

1.2. PPM supporters; an asset or Dark Horse?: The Microsoft technology stack for PPM (Project Standard 2010, Project Professional 2010, Project 2010 and SharePoint Server 2010)has been available and supporting PPM campaigns for the majority of the 21st century. As the industry is realizing an uptick in specializations (such as Project Management Professional (PMP), Microsoft Certified Professional (MCP), etc.) that have certified competencies in project environments, there exist some 'new' bad habits. Previous versions have shown tremendous capabilities in key PPM initiatives (e.g., scheduling and resource forecasting), however there have been some technology weaknesses, and wide organizational immaturity of PPM that has led to both the growth and adoption of technology and processes, as well as pre-conceived notions. Project 2010 has addressed many critical requirements for effective PPM. There remains a lack of information distribution related to the robust features now available in 2010, leading to a gap in understanding the massive upgrade of the new product. It is anticipated that many Microsoft PPM supporters may build in too much buffer to compensate for past versions or previously troubled PPM roll-outs. This may lead to over-estimation, over compensation of time and effort and/or misjudgment of the technology and process requirements.

1.3. Adoption and adoptability: In a PPM environment (or maturing PPM environment) there are two critical factors that must be accounted for;

1. The acclamation and use of the technology by a wide variety of business users
2. The technologies functionality and capability to meet the needs of the business users

As discussed previously, adoption is part hands-on experience and part perception management. Change is often not viewed in a positive light, so demonstrating how the tool will make day to day job functions easier and that the learning curve is not terribly steep is essential in ensuring organizational adoption.

2. Social and personal networks

2.1. Information channels: The Internet and Internet Services offer a good portion of information channels for business users today, but information channels leverage multiple means, including word of mouth, third party channels (reps), research, ratings, search popularity, etc. Microsoft Project has always ranked high in studies and research, but how does it fair in other information channels? One way to evaluate the situation is to look back a few versions, to one of the earlier enterprise platforms in early 2000. There were preliminary 'official' studies performed to evaluate users of Project and their experience. In fact, it wasn't until a portfolio capability was added that Project was moved into a leadership quadrant (Gartner). Decision-makers and business users relied on a few formal information channels and a number of informal channels, mostly unproven and highly subjective, to get the data that would influence decisions.

Overtime the results are starting to roll in, and the technologies, along with solutions and training delivered with the technology, are being rated. PPM is more and more a vital part of the business culture, albeit still being leveraged in a low maturity state. Processes are now leveraging PPM (specifically Project) technologies to meet not only corporate strategies, but compliance issues, budgets requirements and regulations. Project management practices, such as Earned Value (EV) in the construction and government industries, has long been used for litigation and tracking. Now a much wider set of organizations are leveraging these practices in scaled down elements to gain more control over work and costs.

Moreover, as professional specialties increase, certifications for Project as well as industry certifications (e.g., project management, risk management, program management, training, scheduling, etc.) are adding additional information channels and communities of practitioners for business users to reference.

2.2. Peer versus Pure feedback: Sales professional have an advantage and typically an approach for how they call on a prospective executive/decision makers. Sales experts in any industry will have insight into the pulse of the market and what their prospect's competition may be doing or not doing. Additionally, many business professionals (who serve as decision-makers/influencers) attend industry conferences and other sessions where they can network with colleagues. Another form of feedback is pure feedback, which is typically a direct, hands-on experience. But is it feasible to increase your contact with pure feedback, while extending your ability to leverage peer feedback? With information streaming in from multiple sources, often at lightning speed, it is important to maintain critical thinking when looking at feedback. A blend of sources should be evaluated, analyzed and investigated before decisions are made.

3. Facts and opinions (blogs, research, professional associations)

3.1. Validate and quantified sources: In an age of growing Internet Services, communication options are growing (e.g., texting, social media updates, blogs and video). It is less of an issue of information overload, but more of 'inaccurate' or 'unqualified' information overload. Everyone has an opinion, and now has more far reaching channels to voice those opinions. Many opinions are valid, but when researching Project 2010, who do you believe, and what content are you looking for?

3.2. Push and Pull information; the 24 hour accessibility: Because the virtual world is "always on", business users globally now have access to live people and current data 24/7. Many times this leads to discussions, responses and additional opportunities to think and determine a course of action to address business problems. This 'pull' in the market is leading to business users (e.g., consumers of PPM)being more knowledgeable about PPM technologies and processes. Additionally, the social media channels (e.g., blogs, wikis, video blog, etc.) have providers of contents creating a 'push' inertia that gets their thoughts and opinions out to a wide readership.

4. Common Challenges

4.1. An assumption that each business unit has similar demands, objectives and pains; thus can use the same solution. Similar to the Halo Effect, a portion or group within a company recognizes the value another part of the company is realizing from a solution, and they see that same solution relevant for their situation.

4.2. Solution Crowdsourcing or also known as community-based design. Allowing each division or group to define the common solution to their specific needs. Again, trying to create a one-size-fits-all design.

4.3. There will be no resistance to this new system; the President has stated that he wants it. Mandated change is often the hardest for people to digest. It is important to understand that change initiated from the top does not automatically guarantee an easier adoption.

4.4. The assumption that the new system will make employees' jobs harder is prevalent with the introduction of new tools, technology and processes. No employee wants to feel like they will be forced to take a sip from a fire hose. People are very sensitive to learning curves, as it is understood that work already on their plate must still move forward, as well as learning the new system.

4.5. Issues of control (and equally having no control) can create ill-effect in adoption of PPM. The thought of: I control my environment today; the new system is a threat to me and may result in my job not being needed any more, is very real.

4.6. Often new capital investments are viewed as often wasteful. The intention of not being able to afford the new solution can undermine future growth and increase current inefficiencies, which costs quickly outweigh the cost of the new system. Also maintaining a status quo that is currently

seeing little benefit rarely turns around into visible ROI.

5. **Key Steps to Create the Win**
   5.1. Analyze the bigger picture to get a better understanding of the current versus proposed TCO. Just the tangible costs of licenses and maintenance for the existing system is no longer sufficient to justify the new integrated approach. Human inefficiencies resulting from the non-integrated and even broken systems should be factored into decision-making.
   5.2. Newer generations of information workers are adopting the new social software solutions in an accelerated, almost frenetic, pace. Organizational rework must take into account this new way of doing business, both internal and external to the organization (e.g., partner supply chains, social networking, knowledge dissemination, etc.). Ensure that the new PPM initiative and team is looking at the long-range intent of the enterprise.
   5.3. Engage all key stakeholders in the organization on the initiative. The HR department can play a significant role in the area of resource management, skills inventory, role definition, etc. PPM is a multi-player game and the stakes are high.
   5.4. Establish a positive change culture within your organization by ensuring that new PPM initiatives are successful and deliver on the promise of streamlined work, collaborative teams and aid in working smarter, not harder. Identify key initiatives where a win-win is highly probable and ensure the success. Then go and communicate that success. Viral adoption will take it from there.
   5.5. Don't judge PPM by its past. A number of newer technologies had hiccups and burps when they first came out. Today, most organizations typically have one ERP system, one HR system, and someday, we will see the enterprise develop a common platform for work and resource management. After all is said and done project management is a relatively new discipline (e.g., Prevailing theory, such as the Critical Path Method (CPM), has only been around for 50 years). Project has been in the market for approximately 20 years and there are already over 20 Million users worldwide.

Perspective 6: Challenges and Critical Assumptions Related to Selecting Project 2010 as a Solution

Abstract: *This perspective addresses the various challenges and critical assumptions related to selecting Project 2010 and sourcing expertise. There are two major topics covered:*

i. Internal deployment versus vender/partner involvement
ii. What do the external information streams offer?
iii. Advantages to sourcing a qualified partner
iv. Critical assumptions – knowns and unknowns

Evolving technological and social media capabilities has proven to be an effective channel for businesses as the global economy morphs from stovepipe industries to a virtualized economy.

Project 2010 offers the most comprehensive and collaborative PPM solution on the market. The new release has taken great strides in incorporated business process, workflow, BI, as well as the most prevalent scheduling driver in the marketplace. But a mentioned earlier, PPM encompasses more than just the technology. The requirements for successful, ROI creating PPM are varied and diverse involving multiple layers of the organization. Assumptions must be identified and validated, and expected challenges must be addressed to ensure that organizations are placing the best PPM tool into their environment. In today's more sophisticated business environment, believing that decision-makers are going to choose Project 2010 simply because of name recognition is a weak position. Organizations need to understand that Project 2010 is the best tool to meet their needs now and in the future because of its capabilities.

Business leaders are leveraging technological options; for example, corporate functions such as legal, HR, accounting and IT are being subsidized by outsourcing or tasking internal folks to learn and manage the technologies using information available through the Web and social contacts. The internal competencies and capabilities of each person in the organization continue to rise as these changes are adopted. Similar to the how the personal computer (PC) changed the way in which data and information was created, shared and stored; organizational business users are getting better at identifying and using technology to expose relevant information to make decisions. But be cautioned as these evolutions may instill a sense of confidence that organizations can do more with less, if not do it all with less. Indeed, technology is more business user friendly, but don't overlook the need for solid planning and leveraging competent resources.

According to Gartner's research (ITScore Overview for Program and Portfolio Management) "Organizations are constantly working to improve the value of their investments. Regardless of the economic state or the health of the particular organization, discretionary projects and initiatives receive significant scrutiny. How well money is spent and managed within initiatives determines not only the economic success of an overall strategy, but also the personal success of those who put those initiatives into motion". Project 2010 introduces a new level of PPM capability to organizations and business users[12]".

Consumers and business decision-makers are savvier than they have ever been. With organizations spending more than 50 cents of every dollar of their IT hardware budget on storage, and the amount of data they're storing and managing growing by double-digit percentages or more, savvy IT managers are exploring a variety of new strategies and technologies with the aim to reduce infrastructures costs. The pressure on IT professionals to store, preserve and protect data while still making data accessible has intensified.

[12] Magic Quadrant for IT Project and Portfolio Management
http://www.gartner.com/technology/media-products/reprints/microsoft/vol10/article12/article12.html

The Gartner EXP Worldwide Survey of Nearly 1,600 Chief Information Officers (CIOs) shows IT budgets in 2010 to be at 2005 levels "while technologies are transitioning from "heavy" owner-operated solutions to "lighter-weight" services, CIO's are, in turn, transitioning IT beyond merely managing resources to taking responsibility for managing results"[13]

Below is the top 10 business priorities side-by-side to the top technology priorities. These represent top demands organizations are facing.

Ranking	Top 10 Business Priorities	Top 10 Technology Priorities
1	Business process improvement	Virtualization
2	Reducing enterprise costs	Cloud computing
3	Increasing the use of information/analytics	Web 2.0
4	Improving enterprise workforce effectiveness	Networking, voice and data communications
5	Attracting and retaining new customers	Business Intelligence
6	Managing change initiatives	Mobile technologies
7	Creating new products or services (innovation)	Data/document management and storage
8	Targeting customers & markets more effectively	Service-oriented applications and architecture
9	Consolidating business operations	Security technologies
10	Expanding current customer relationships	IT management

Organizations today continue to look for ways to reduce implementation and administration cost while driving value and profits directly to the bottom-line. As information is more readily available, and people are more readily accessible, organizations are taking bold steps to selecting and implementing change using technology and processes. Since PPM has intricate contact with corporate constraints (costs and resources) and bottom-line results (actual work completed), there is vested interest at the decision-making level to do everything right. Many times, this includes choosing to install the technology themselves, internalize process improvements and leverage the growing access to information via Web and social channels. Although there is a strong business case for taking this approach, the risks are similar to someone self-diagnosing and self-medicating themselves. Often, people are right --- they have a cold. Other times they were mistaken, and needed prescriptions or perhaps more evasive measures. And in hindsight, would have been better off had they sought assistance from experts sooner.

The following scenarios will highlight the perspective of an organization's option to going it alone and options to secure assistance externally in support of their Project 2010 initiative.

Many organizations in today's economy are looking for more cost-effective measures, as well as utilizing internal resources as much as possible. The current challenges Project 2010 faces today is that it is

[13] Gartner EXP Worldwide Survey of Nearly 1,600 CIOs Shows IT Budgets in 2010 to be at 2005 Levels http://www.gartner.com/it/page.jsp?id=1283413

technically more efficient to set up and deploy as an infrastructure. Therefore, many organizations are choosing to have their internal technical staff deploy.

1. **Perspective options to internally selecting, deploying, and supporting Project 2010:**
   The following are business case examples for an organization to choose to deploy without a partner:

   1.1. Project 2010 touches much more of the deep organizational data. Thus there is often security sensitivity of working with data. An example may be when integrating financial data, often from an ERP system, or product design system. Organizations have established policies and effective processes around compliance, financial and product development environments, as well as dedicated employees to serve as internal experts to manage the data. Sourcing an external entity to focus on Project 2010 who may not have the depth and experience or qualifications to handle the sensitive data poses a risk. Thus, the options may be more beneficial for an organization to install, configure and deploy internally to control the exposure of the sensitive data.

   1.2. Project 2010 leverages the SharePoint Enterprise platform and enables more integration of BI metadata to be threaded within the management structure for Project 2010. SharePoint has evolved as a business data management system faster than Project Server has. Many organizations have already initiated document management and information portal campaigns prior to the consideration of a PPM system. Many instances have SharePoint supporting data from other legacy systems, including Systems, Applications and Products [in Data Processing] (SAP), Project Lifecycle Management (PLM) systems, etc. Often, SharePoint is already being used for continuous improvement, lifecycle management processes and other information sharing and collaboration functions. Thus, organizations have acquired a significant level of knowledge working with the data in an enterprise environment. Adding Project 2010 may seem like a manageable step for internal resources.

   1.3. Main business justifications for Project 2010 are the ability to expose, track and control resource work and costs related to actions that are tied to corporate objectives and goals. As Project 2010 resides in an enterprise collaborative environment (namely SharePoint Server 2010), it is increasingly critical to business users that Project data is accessible and reportable. These requirements are typically core for effective delivery to the strategic objectives, which makes Project 2010 much more enticing to internal decision-makers. As they know the business better than anyone else, they make assumptions they know how to structure the technical business platform to meet their business needs.

2. **What does the external information stream offer?**

2.1. As the Internet continues to grow and mature, so does the data. The US judicial system is built upon the premise of innocent until proven guilty, and judged by a jury of peers. The Internet has followed virtually a similar cycle, where data was seemingly true or valid until reviewed and rated by others. What decision-makers now have access to are more channels of vetted options which contain credible, validated information compliments of the social and virtual stratosphere. In the past, research firms would spend staggering amounts of time and capital to reach end-users, rate products and services, and craft an analysis of the findings that is meaningful to business decision-makers. Search engines such as Bing are advancing the search algorithms to mine data based on results criteria.

2.2. There are a huge array of Internet sources that provide a broad range of resources to an organization that wish to deploy without a partner. A number of which either provides access to their resources via a subscription or act as store-fronts for their partner offerings. Informational content provided is often only a part of the necessary knowledge required. Just as business decision-makers have become savvier, marketplace providers have become more savvy at crafting content to drive sales. The key source is of course www.microsoft.com/project as the central portal for anything Project 2010.

2.3. At the time this paper was authored, key Social and Business Networks that were directly involved with PPM included LinkedIn, the Project Management Institute (PMI) Scheduling Community of Practice (formerly College of Scheduling), and the Microsoft Project 2010 PPM Virtual Showcase. A new category of social collaboration software is breaking through the grid from multiple third parties. Virtual Events sites, including the Microsoft Worldwide Events (WWE)[14] offer a significant amount on self-paced on-demand training.

2.4. There are a number of professional associations that are primarily in the business of brokering knowledge, certifications, and people networking. These associations offer a multitude of complementary training, white papers, videos, and access to trial software and complementary learning products.

3. Advantages to sourcing a qualified partner:

3.1. There is inherent risk in assuring that the end-user needs remain critical for the success of implementation and adoption. Organizations have become more aware of end-user needs and the critical relationship between user preparation and implementation success. However, the old habits of organizations still remain: the perception that once solution has been installed and the training has been delivered, that the organization reaches a level of competence that will remain constant. An organization's ROI will improve only with a concentrated effort to ensure the ongoing competence and confidence of its users in usage of the tool. A 2006 report

[14] Microsoft Worldwide Events (WWE) www.msevents.microsoft.com

from International Data Corporation (IDC)[15] indicates, “Training on complex systems is a never-ending cycle. There are always new processes, new employees, and new locations that must be brought up to speed or brought online, and no group can be left out.”

3.2. Many times a business system initiative is launched within an organization to meet its internal needs; for example, the product engineering team will acquire PPM technologies to manage its project and programs. However, it is the ‘demand’ inside the organization from another department (e.g., the sales department) that is forcing the change with engineering. Mastering these insights requires experience within the inherent needs and capabilities of PPM, which a qualified partner can identify. This will save the organization time and heartache.

3.3. SharePoint is a game changer. "SharePoint, in a sense, is becoming an operating system." states Steve Ballmer, Chief Executive Officer (CEO) for Microsoft. There is a new dynamic to the Enterprise Content Management (ECM) space. It’s being enabled and forever changed with the new release of SharePoint 2010. There are so many organizations that already own SharePoint and there are so many partners that have subject matter expertise across countless verticals and horizontals. There will likely be an explosion of partners and solutions hitting the market in the coming year.

Qualified SharePoint partners can help improve IT service excellence, lower development costs, and help organizations develop their competitive advantages through the innovative application of the Microsoft SharePoint platform.

3.4. PPM historically has had to compete for funding as an IT expense. As the PPM software has grown in size, scalability and use, the infrastructure requirements have increased. Additionally, the collaboration elements with PPM technologies demand more from the organization’s systems, processes and end-users. What normally starts in IT, grows out to other groups, leads to the additional need of training, possibly extensive consulting services and on-going system and process support --- it truly is a cultural change. Project 2010 is a business application within a business platform, the approach for organizations and consultants to secure executive agreement means a team effort and a shift in the approach.

4. Critical assumptions – known and unknown:

4.1. Data Context: In previous versions of the Project product, the technical architecture depended upon leveraging and extracting metadata from Structured Query Language (SQL) Server environments. Typically, the SQL Server is a secured environment, with restrictions at the highest level due to the sensitivity of the information that has the potential to be exposed.

[15] Process Training, Enabled by Tools and Processes from SAP Education, Is Critical for Technology Adoption at Kimberly-Clark http://www.sap.com/cis/services/education/russia/infopak/customersuccess/Kimberly.pdf

What has typically happened is that Project Server data was exposed, bringing a dose of reality to the users and decision-makers --- specifically because the data was put into context--- a project management context which often requires a skilled 'interpreter' of the message and impact of the data. This means the data, within a project management context, can have expanding and far reaching meaning and implications, different from its usual presentation within a table or database.

4.2. Financial: Organizations are constrained by the budget they are allocated. Those tasked with setting, managing and controlling the budget are the critical stakeholders. Many engagements, partners and even internal stakeholders find themselves at the mercy of the financial controller who needs to sign off on the expenses. Often the organization is more agile and of a matrix design organizationally where the financial subject matter expert (SME) assumes the manager or requester has the business case, however there are times that further explanation is required, and that justification tends to scale beyond a straight forward IT investment or training cost. PPM is not solely a quality or continuous process initiative, although it affects and supports both by its very nature. It takes a strong business case that is articulated in bottom-line facts and elements to allow the costs to be supported and approved.

4.3. Non-PMO: As mentioned in the Demand Management white paper, understanding and quantification for the use of Project declines the further away from the PMO construct it is. Many times, pockets of activities and/or unique initiatives within the organization go unnoticed and undetected within the PMO. Why is this an issue? Typically, these initiatives and activities require the contribution of resources, many times skilled resources. And as organizations are utilizing shared resources on a majority of its initiatives, this lack of visibility can affect the bottom-line when resource constraints affect project success.

4.4. Decision-makers are of different profiles: According to a recent CIO report[16], "Decision-making styles are behavior-based, so the key to correctly identifying an executive's tendency is to pay attention to what she does, not what she says". Understanding how to present a well-articulated message is a *core* competency; delivering that message in a manner that resonates with its target audience is however the *critical* element that is often not taken into consideration.

Real world example of a progressive global manufacturing organization and the challenges often faced in choosing a PPM solution:

[16] How to Tailor Your Message to Different Kinds of Decision-Makers
http://www.cio.com/article/29850/How_to_Tailor_Your_Message_to_Different_Kinds_of_Decision_Makers_?page=2&taxonomyId=3164

The organization in this example is a global entity serving in the manufacturing industry. The organization has been in existence for decades, and is a leader in the space they serve. The product lines are diligently managed by teams of experts in their respective fields; including certified project managers, certified engineers and other industry experts.

The product teams use a third party product for overall project visibility, but all the scheduling and forecasting is performed using Project 2003 Desktop or Microsoft. Essentially, program management and key milestones are managed in the third party application and data is cascaded to the sub-groups that report using Project or Excel. One of the sub-groups is looking to select Project Server 2010. The goal is to secure better resource capacity planning, forecasting and ability to meet key program milestones.

Assumptions by the organization:

- That Project 2010 will simply be a scheduling and resource planning tool as a subset to the third party application already in use
- Staff of the sub-group already uses Project 2003 Standard, so the organization believes that migrating all users to Project 2010 will be easy
- The use of the processes for managing resource load and related costs (currently done in Excel) will be easily adopted in Project 2010 by simply transferring data from legacy products to Project Server 2010
- This party application already in use as their main project management software will drive the demand from the program level, and each sub-group will simply report their schedule status (from Project 2010) and the program will still have better visibility using the third party application

Analysis:

- Project 2010 is used to pull all groups together into a central Project platform to better align with the program level. It is an integrated system built for accessing data visibility at multiple PM levels.
- Project 2010 may initially remain a compliment to the third party application in use, but if the deployment is executed well, stakeholders may see more capabilities innate within Project 2010 and eventually replace the third party application
- Project 2010 data extends across all Microsoft Office applications offers collaboration and other Web capabilities that the third party application does not. This allows for easier end user adoption of usage from via familiar interfaces. Also, this deep integration removes the need for third party add-ons, reducing the points of failure and requirement for customized, and often costly, programming

- Project 2010 will serve as a business and BI platform, including Earn Value (EV) and strategic planning for all programs
- Selecting a qualified consulting vender that specializes in Microsoft Project and PPM will be done to ensure a smooth integration of all systems in use

Sometimes there are opportunities for POEs by capturing a departmental need and scaling the larger solution to address that one need. Then, over time, more capabilities can be introduced to the organization illustrating that Project 2010 accomplishes in itself what they are using multiple systems for. As stated before, organizations are looking for cost savings within their IT architecture and this is a perfect example of how the multiple capabilities of Project 2010 can address vital issues that may be considered as non-PPM issues.

5. Common Challenges

5.1. Simply upgrading from Project 2003 Standard to Project 2010 and dozens of Project 2010 clients internally can be tricky. An experience and qualified partner can assist in guiding this migration.

5.2. Synchronizing data via integration between Project 2010 and LOB applications requires proper architecture and/or professional partner support.

5.3. Taking existing Excel and other reports and transferring the data directly into Project 2010 requires skilled IT configuration that internal sources may not possess.

5.4. In the above scenario, the organization did not factor in user training for Project Server 2010. A tool is only as good as its use. If the end user cannot function efficiently within the tool, fragmented work-arounds will begin to appear.

5.5. Especially when blending multiple technologies into one system licensing can be intricate and confusing. Organizations must ensure adequate licensing is obtained for all the components. Use of Microsoft Developers Network (MSDN) licenses to manage their Project 2010 production environment may not be sufficient.

5.6. Failure to take the appropriate technical and PPM related training, prior to system configuration and deployment is a common flaw in deployments. These complex systems require different role-based training tailored to job responsibilities and functions.

5.7. Inexperience with the system architecture or lack of appropriate hardware can result in poor performance of the system with things such as trying to run everything on one server.

5.8. PPM, whether utilizing one main technology platform or multiple system components remains process driven. Having no Staging System or change control processes, etc. in place will decrease efficiencies in execution and bottom-line dollars as project spiral out of control and are not trackable in a meaningful way for the organization.

5.9. Technologies are always subject to tweaks and adjustments. If the organization does not apply Cumulative Updates and Service Packs as they become available the system will break or create chasms prime for maleficent hacks.

5.10. Attempting to "boil the ocean" or "leap into the future" often as a result of a Senior Management dictate (e.g., we need this new system online next month!) can do more harm than good. Bells and whistles are shiny and attractive, but if the solution is not scaled to the organization's present status, end users will become overwhelmed and strong ROI is not achieved.

6. Key Steps to Create the Win

6.1. All organizations should consider engaging a qualified partner (i.e., that have obtained the PPM competency through Microsoft)[17], but especially Level 0 or Level 1 organizations as they are just beginning to form their PPM foundation. Work done at this critical stage will set the scene for successful PPM adoption across the enterprise.

6.2. Work with your Microsoft Licensing Specialists and Value Add Reseller (VAR) or Large Account Reseller (LAR) to ensure adequate licensing is in place (concurrent with the deployment).

6.3. Ensure that adequate Microsoft Premier Support[18] coverage is in place to enable assistance from Project Server technical support resources (prior to the deployment).

6.4. Define a Transition Plan and then follow that plan. Watch for scope creep in this critical area. Organizations will be much further ahead of the game if you do "first things first". Again, a certified Microsoft Solution Partner has the experience (and battle scars) to ensure success.

6.5. Ensure that end-users are adequately trained and have had hands-on experience with scenarios they are going to encounter on a day-to-day basis. Making end users comfortable with the new tool will accelerate adoption.

6.6. Create end-user documentation that describes the normal process flow. Detailed documentation remains a data driven point of reference for future resources to learn from, or for organizations to engage in continuous improvement.

6.7. Not everyone will know what to do next, especially if something "goes wrong". Ensure that there are trained and identified support personnel to answer key questions as the system goes live. It will take a while to build up internal "institutional knowledge"

6.8. End-users will often be able to learn from each other and provide valuable feedback to the system administrators and key PMO personnel, about common issues and needs. An easy way to capture this intel is to provide for brown-bag lunch training sessions.

[17] Microsoft Partner Network Portal https://partner.microsoft.com/US/30000104?ID=91160884
[18] Microsoft Services Premier Support http://www.microsoft.com/microsoftservices/en/us/support_premier.aspx

6.9. Build a safe and friendly community around the new PPM solution. Very often new systems die before they generate any real value due to unresolved issues, data re-entry and rework, and possible puzzling situations that no one seems to know how to resolve. Have a regular communications meeting about new capabilities and changes, so that the end-users are not "surprised" with new things that are coming at them. This also provides a one stop shop for vetting issues encountered by end users and will lessen the chance of ad hoc and disjointed 'fixes' being implemented.

6.10. Reward teams for successes. All too often we single out individuals for their efforts, instead of sharing the "tribal" wins. This can result in too many "Level 0 heroics" and hold the organizational maturity back. There is also the risk that these people move on, taking the valuable "how to" knowledge with them when they leave.

Key Summary Points

Key summary points are highlighted here to remind the reader of some of the vital considerations presented in this paper.

- As the PPM software has grown in size, scalability and use, the infrastructure requirements have increased. Additionally, the collaborations elements with PPM technologies demand more from the organization's systems, processes and end-users. What normally starts in IT, grows out to other groups, leads to the addition of training, possibly extensive consulting services and on-going system and process support --- it truly is a cultural change.
- Organizations are constantly working to improve the value of their investments. Regardless of the economic state or the health of the particular organization, discretionary projects and initiatives receive significant scrutiny. How well money is spent and managed within initiatives determines not only the economic success of an overall strategy, but also the personal success of those who put those initiatives into motion.
- The volatility of an organization's culture is now more prevalent than previously anticipated. Due to the global economic changes over the 2008-2010 time period a number of external factors have impacted the ability of organizations of various sizes to select and adopt updated technology. This makes the choice of the appropriate technology essential in getting the most from the organization's investment.
- Change occurs only when the environment become turbulent. Emerging markets globally are realizing the growth trends because of an unbalance. This flux pushes people out of their comfort zone. When the environment moves away from status quo, innovation, updating and eventually change takes root.
- Much of the controversy around organizational maturity models stems from a mismatch between the amount and type of processes applied at each level and the organization's basic cultural mental model (regardless if it is a volatile market, stable market or turbulent market).
- If organizations attempt to push such changes too fast or too far, they often encounter cultural conflicts and wholesale rejection by all the concerned parties. The PPM Maturity Model is intended to help senior management avoid such problems by providing a framework that can help facilitate communication with executive management by comparing their organization's PPM processes and attributes to those in the Gartner model.

Conclusion

It's not just about the technology, the processes, or the people; it is all about ensuring that we have the best possible impact on the business. Therefore we must address PPM from a business perspective.

Business leaders are now seeking information and knowledge management, BI, and analytic capabilities that are far beyond the current capabilities of their IT infrastructure. With the recent downturn in the economy, businesses are also being forced into re-evaluating their current investments in IT, methods, and processes with which they will run their business in the coming decade. Information workers across the board are being asked to take on more and make do with a lot less.

These are only a couple of the key factors driving the need for better integrated work and resource management solutions. An ever increasing competitive landscape, along with associated time-to-market considerations are also driving the need for better end-to-end information and knowledge management.

With the addition of the SharePoint Server 2010 platform, integration and collaboration have been extended from within a tool, to an integral piece that is easily accessed throughout the organization. This portal for information and document collection creates organizational assets that will benefit at all levels of PPM, but also aid in an organization's growth and development.

In their June 2010 Magic Quadrant report[19], Gartner states, 'Project and portfolio management (PPM) applications can provide visibility into the current state of organizational initiatives, resources and spending through the centralized collection of data from multiple sources and perspectives. Integration across multiple business and IT process domains through PPM functions provides multidimensional views of this data for better visibility and understanding of resource supply versus project (and other work) demand in IT and other project environments.'

Microsoft Project 2010, built on SharePoint 2010, introduces a new level of PPM technology to organizations and business users that far surpasses anything on the market today. In one connected package, keeping business at the core, Project 2010 enables efficient project execution and measurable ROI that will drive business forward on a strong platform into the next decade.

[19] Magic Quadrant for IT Project and Portfolio Management, Gartner, June 7, 2010
http://www.gartner.com/technology/media-products/reprints/microsoft/vol10/article12/article12.html

Glossary

Application Lifecycle Management (ALM): A continuous process of managing the life of an application through governance, development and maintenance. ALM is the marriage of business management to software engineering made possible by tools that facilitate and integrate requirements management, architecture, coding, testing, tracking, and release management.

Business Drivers: Factors in the industry or the broader business environment that either impact the financial institution or provide opportunity for business expansion. The strategic responses identify the business priorities or initiatives designed to take advantage of those drivers. The technology initiatives identify the key areas of focus to provide the infrastructure and tools to support the business initiatives. They can also be an objective that projects can be measured against commonly known as Strategic Goals.

Demand Management (DM): A unified view of all work in a central location. Its purpose is to quickly help organizations gain visibility into projects and operational activities, standardize and streamline data collection, enhance decision making, and subject initiatives to the appropriate governance controls throughout their lifecycles.

Earned Value (EV): The value of work performed expressed in terms of the approved budget assigned to that work for a schedule activity or work breakdown structure component.

Earned Value Management (EVM): According to the PMI PMBOK® Guide—Fourth Edition**,** a management methodology for integrating scope, schedule, and resources, and for objectively measuring project performance and progress. [i] Performance is measured determining the budgeted cost of work performed (e.g.: earned value) and comparing it to the actual cost of work performed (e.g.: actual cost).

Governance Workflow: Each project template is subjected to the appropriate controls throughout its lifecycle and determination of which online forms are displayed at each stage in the project lifecycle.

Phases: Represents a collection of stages grouped together to identify a common set of activities in the project lifecycle. Examples are: project creation, project selection, and project management. The primary purpose for Demand Management is to provide a smoother user experience where users have the option of organizing stages into logical groups.

Project: A temporary endeavor, having a defined beginning and end (usually constrained by date, but can be by funding or deliverables), undertaken to meet unique goals and objectives, usually to bring about beneficial change or added value.

Project Management Office (PMO): An organizational body or entity assigned various responsibilities related to the centralized and coordinated management of those projects under its domain. Responsibilities can range from providing project management support functions to actually being responsible for the direct management of a project.

Project Portfolio Management (PPM): A term used by project managers and project management (PM) organizations, to describe methods for analyzing and collectively managing a group of current or proposed projects based on numerous key characteristics. The fundamental objective of PPM is to determine the optimal mix and sequencing of proposed projects to best achieve the organization's overall goals.

Stages: Represents one step within a project lifecycle. At a user level they appear as steps within a project. At each step, data must be entered, modified, reviewed, or processed.

Program: A group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually. They may include elements of related work outside of the scope of the discrete projects in the program.

Portfolio: A collection of projects or programs and other work that are grouped together to facilitate effective management of that work to meet strategic business objectives. The grouped projects or programs may not necessarily be interdependent or directly related.

Abbreviations Used

Abbreviation	Meaning
ALM	Application Lifecycle Management
APM	Advanced Power Management
BI	Business Intelligence
CEO	Chief Executive Officer
CIO	Chief Information Officer
COE	Centers of Excellence
CPE	Customer Partner Experience (Microsoft customer program)
CPM	Critical Path Method
CRM	Customer Relationship Management
DM	Demand Management
ECM	Enterprise Content Management
EPM	Enterprise Project Management
ERP	Enterprise Resource Planning
EV	Earned Value
EVM	Earned Value Management
HR	Human Resource
HRIS	Human Resource Information System
IDC	International Data Corporation
IT	Information Technology
LAR	Large Account Reseller
LOB	Line of Business
MBO	Management by Objectives
MCP	Microsoft Certified Professional
MPUG	Microsoft Project User Group
MSDN	Microsoft Developers Network
OEM	Original Equipment Manufacturer
PC	Personal Computer
PLM	Project Lifecycle Management
PM	Project Management
PMI	Project Management Institute
PMO	Project Management Office
PMP	Project Management Professional (PMI certification)
PMI-SP	Scheduling Professional (PMI certification)
POC	Proof of Concept
POE	Point(s) of Entry

PPM	Portfolio Project Management
ROI	Return on investment
SME	Subject Matter Expert
SQL	Structured Query Language
TOC	Total Cost of Ownership
VAR	Value Add Reseller
WWE	(Microsoft) Worldwide Events
YoY	Year over Year

References

Microsoft Project 2010 Resources:

Product information

- Project 2010 product site: http://www.microsoft.com/project
- Project Team Blog: http://blogs.msdn.com/project
- Customer Successes: http://www.microsoft.com/project/en/us/customer-success.aspx
- Team Foundation Server 2010 Support for Project Server: http://blogs.msdn.com/b/project/archive/2011/03/08/new-feature-pack-from-visual-studio-improves-project-management-and-software-development-team-collaboration.aspx
- White papers: http://www.microsoft.com/project/en/us/articles-white-papers.aspx
- SharePoint 2010 product site: http://www.microsoft.com/sharepoint

End-User Product Help

- Project 2010 Help http://office2010.microsoft.com/project-help
- Project 2010 Help http://office2010.microsoft.com/project-server-help
- Demand Management for Project 2010 - http://go.microsoft.com/?linkid=9739874
- Business Intelligence for Project 2010 - http://go.microsoft.com/?linkid=9726143
- Upgrade and Migration to Project 2010 - http://go.microsoft.com/?linkid=9676814

Interactive content - Videos & Sessions & Webcasts

- http://www.microsoft.com/showcase/en/US/channels/microsoftproject
- http://www.microsoft.com/events/series/epm.aspx

Project Professional 2010 and Project 2010 Demo Image:

- Download: http://go.microsoft.com/?linkid=9713956

- Hosted Virtual Lab: http://go.microsoft.com/?linkid=9713654

IT Professional related - TechNet

- Tech Center: http://technet.microsoft.com/ProjectServer
- Admin Blog: http://blogs.technet.com/projectadministration

Developer related - MSDN

- Developer center: http://msdn.microsoft.com/Project
- Programmability blog: http://blogs.msdn.com/project_programmability

Got Questions? Search or ask in the official Microsoft Forums!

- http://social.msdn.microsoft.com/Forums/en-US/category/projectserver2010,projectprofessional2010/

SharePoint 2010 Products

- http://sharepoint.microsoft.com

Portfolio Strategy Webcasts

- Overview of Project Portfolio Management Using Project Server 2010
- Deep Dive into Project Portfolio Management Using Project Server 2010

Demand Management Webcasts

- Project 2010 Demand Management (Part 1 of 4): Overview
- Project 2010 Demand Management (Part 2 of 4): Create and Select Phases
- Project 2010 Demand Management (Part 3 of 4): Plan, Manage, and Close Phases
- Project 2010 Demand Management (Part 4 of 4): Test the Theory and Review
- PowerPoint decks: Demand Management Webcasts PowerPoint decks
- www.msevents.microsoft.com

Internet-based PPM Resources

- www.gantthead.com
- www.ittoolbox.com
- www.bitpipe.com
- www.projectsatwork.com

Social and Business Networks

- www.linkedin.com
- www.twitter.com
- www.mangospring.com
- http://www.tribalgraph.com/

Professional Associations

- www.pmi.org
- www.mpug.org
- http://www.ipma.ch/Pages/default.aspx
- http://www.iappm.org/
- http://www.apm.org.uk/
- http://www.apminfo.com/
- http://www.afitep.fr/
- http://www.theiet.org/

Other

- Microsoft Most Valuable Professional (MVP) program: https://mvp.support.microsoft.com/communities/mvp.aspx?product=1&competency=Project
- Advisicon Blog: www.advisiconblog.com