Project Intake & Prioritization

1 of 5 in the 'Building Blocks of PPM™' webinar series

Your Presenter

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- PMO/Process work in 13 countries and throughout the US
- 16 years of scheduling experience
- 50+ Microsoft Project/Project Server deployments
- PMI Scheduling Professional (PMI-SP)
- Microsoft Certified Professional (MCP)
- Microsoft Certified Trainer (MCT)
- EPM Deployments, Training and Add-on Products

Sensei Project Solutions

➢ Microsoft Partner with deep expertise in PPM solutions

➢ 100+ Microsoft Project/Project Server deployments

➢ 1,000+ Project Managers/Team Members trained

➢ Certified on entire technology stack + Project Management:
  - PMP/PMI-SP, MCP, MCT, MCTS, MCSE

Microsoft® Partner
Silver Project and Portfolio Management

How do we help our clients?

➢ Deployment Services
   • Microsoft PPM solution
   • On-going support services

➢ Training
   • Role-based, Process-focused
   • Coaching and Mentoring

➢ Solutions
   • 'Jumpstart' solutions ('project in a box')
   • Report Packs

The Building Blocks of PPM™

Project Status and Portfolio Reporting

Track actual progress to date and reforecast based on Estimates To Completion; status against key performance indicators and roll-up portfolio reporting

Project Planning and Collaboration

Plan the detailed scope of work with key deliverables, milestones and resource assignments. Collaborate on project artifacts

Budgeting and Cost tracking

Load budgets & cost estimates in project schedules; then track progress and report variance during execution
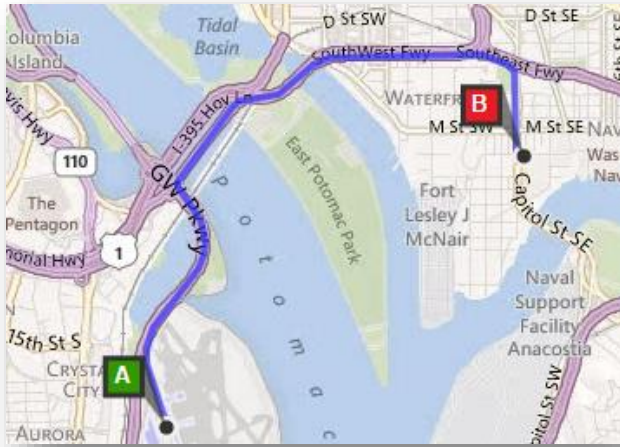
Resource Capacity/Demand Management

Establish resource capacity baseline and capture work demand to identify staffing bottlenecks

Project Intake & Prioritization

Capture project proposals with supporting business cases and prioritize against business drivers and existing workload

Proactive Scheduling™ – Analogy

Printed Directions

Static; out-of-sync after detour or wrong turns; no update to arrival time or distance

GPS System

Tracks actual progress; re-routes on detours; provides accurate forecast of arrival time

Proactive Scheduling Evolved

Static Schedule

Hard-coded with artificial dates; no forecasting ability; unreliable; inaccurate actuals; snapshot of a point in time; not actionable

Proactive Schedule

Shows actual progress-to-date; reflects estimates to completion; predicts completion dates and total cost estimates; enables corrective action and decision-making

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Project Intake & Prioritization

Project Proposals

**Capture all proposed projects
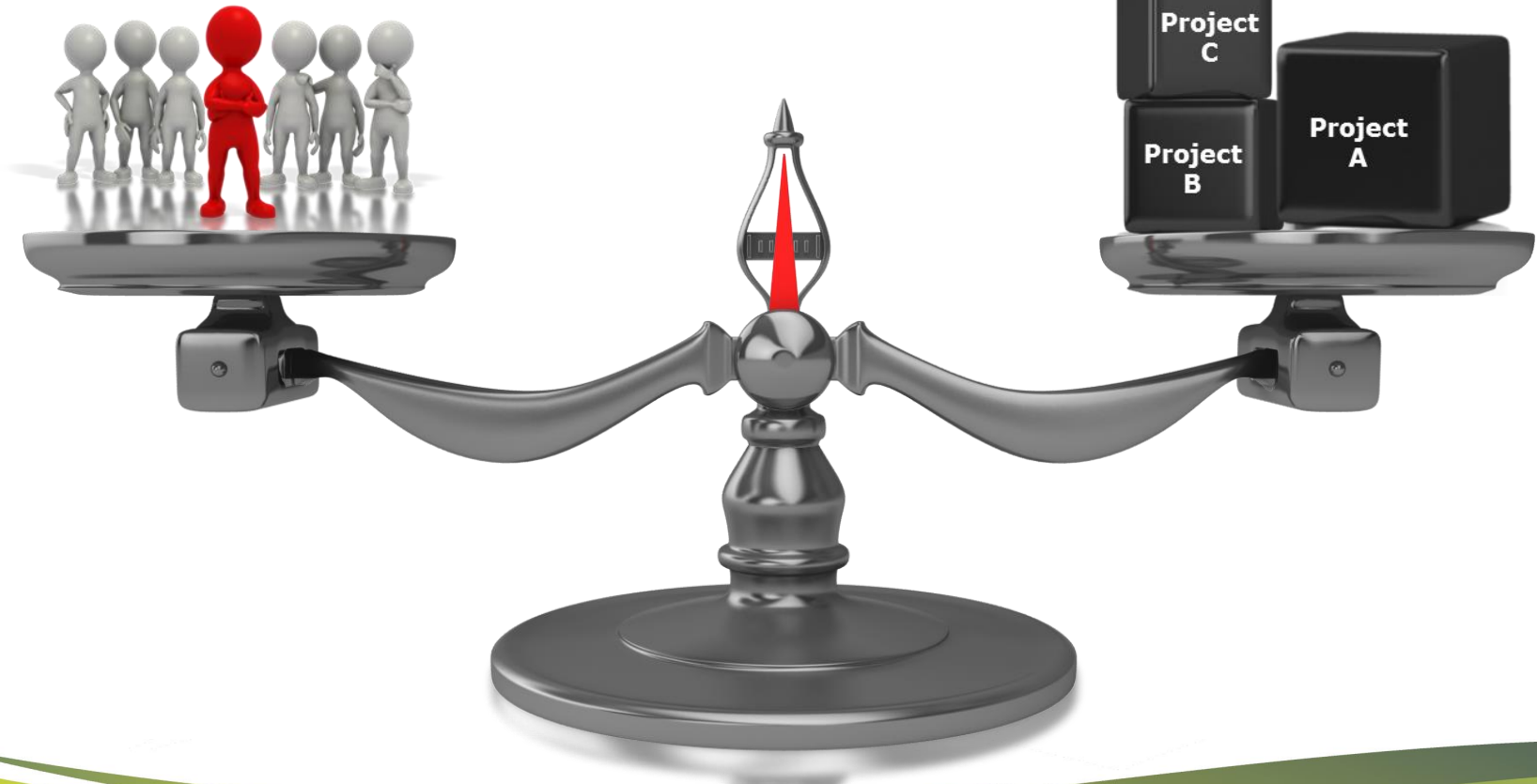with business case, staffing
needs and cost information**

Prioritized Portfolio

**Rank and select proposed projects
based on business drivers,
budgets and existing workloads**

Resource Capacity/Demand Management

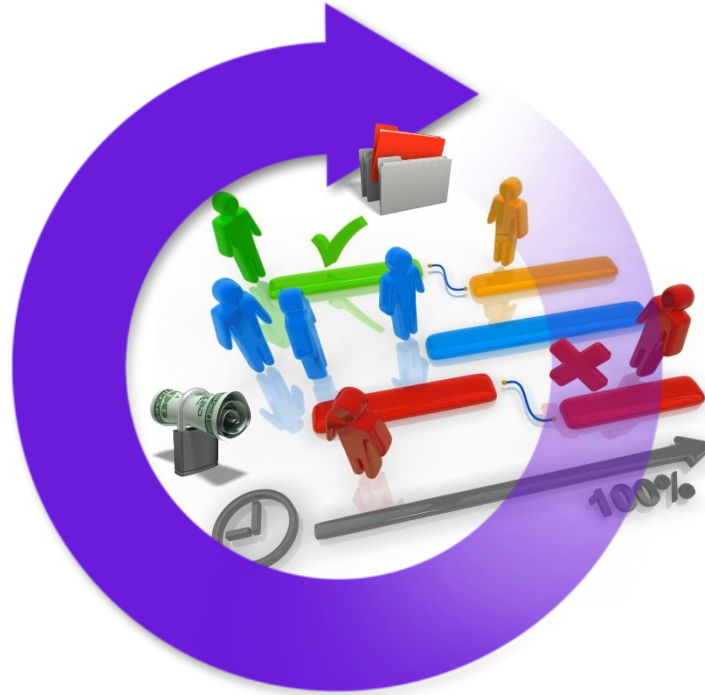# Budgeting and Cost Tracking

Budgeting

Capture the approved funding; schedule the planned spending; and set the project baseline

Cost Tracking

Track actual costs during execution; reforecast Estimates At Completion; identify variances from baseline
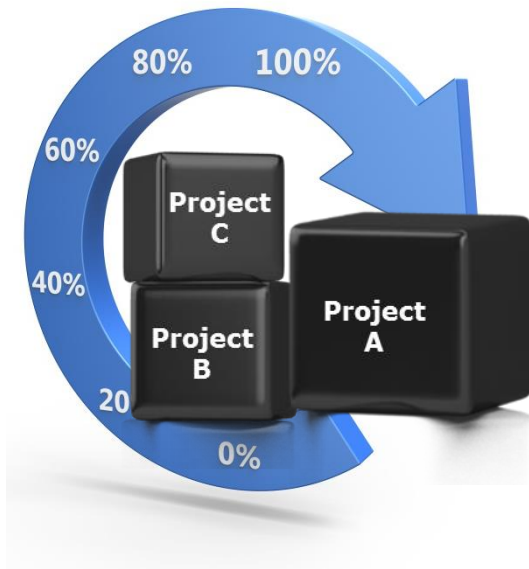
Project Planning and Collaboration

Proactive Scheduling

Integrates business case, scope, budgets, resources, deadlines and constraints.

A Proactive Schedule reflects what was originally agreed upon and is continuously updated to show progress, variance and an updated forecast.

Project Status and Portfolio Reporting

Project Status

Report on project progress; show variances to-date; provide updated forecasts

Portfolio Reporting

Track key performance indicators; identify resource bottlenecks; facilitate better decision-making

The Building Blocks of PPM

Project Status and Portfolio Reporting

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Load budgets & cost estimates in project schedules; then track progress and report variance during execution

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Project Intake & Prioritization

Capture project proposals with supporting business cases and prioritize against business drivers and existing workload

Project Intake

➤ Capture incoming proposals in online **business case** form(s)

➤ Identify high level **staffing plan**

➤ Estimate **costs**

➤ Propose **start/finish** dates

➤ Identify required **Go-Live** date

➤ **Strategic alignment**

Enterprise Project Types

➢ Software Development

➢ Infrastructure

➢ Production Support

➢ Basic Project Plan

Business Drivers (Strategic Alignment)

Project Strategic Impact

Rate the impact of this project on the business drivers below.

Expand into new markets and segments

Expand revenue growth aggressively by penetrating new markets and expanding reach to segments of penetrated markets

- ○ **No Rating**
- ○ **None:** Does not grow revenue from any markets and segments
- ● **Low:** Grows revenue from new markets and segments by up to $500K
- ○ **Moderate:** Grows revenue from new markets and segments by $500K to $1M
- ○ **Strong:** Grows revenue from new markets and segments by $1M to $3M
- ○ **Extreme:** Grows revenue from new markets and segments by more than $3M

Improve Customer Satisfaction Score

Measurably improve scores on customer satisfaction surveys through implementing standardized customer service processes, grow the number of customer service relationships, and improve the nature of each relationship

- ○ **No Rating**
- ○ **None:** Does not change customer satisfaction index
- ○ **Low:** Increases customer satisfaction by up to 2%
- ● **Moderate:** Increases customer satisfaction by 2% to 3%
- ○ **Strong:** Increases customer satisfaction by 3% to 5%
- ○ **Extreme:** Increases customer satisfaction by 5% or more

Increase market share in existing markets

Improve market share percentage or market position in already penetrated markets

- ○ **No Rating**
- ○ **None:** Has no impact on market share
- ● **Low:** Improves share in penetrated markets by less than 1%
- ○ **Moderate:** Improves share in penetrated markets by 1% to 3%
- ○ **Strong:** Improves share in penetrated markets by 7% to 15%
- ○ **Extreme:** Improves share in penetrated markets by more than 15%

Reduce Expense Base

Implement standardized practices across organization to reduce expense.

- ○ **No Rating**
- ○ **None:** Does not reduce expense base
- ○ **Low:** Reduces expense base by up to $250K
- ● **Moderate:** Reduces expense base by $250K to $500K
- ○ **Strong:** Reduces expense base by $500K to $1M

Driver Name	Priority
Increase market share in existing markets	61.51%
Expand into new markets and segments	22.59%
Improve Customer Satisfaction Score	8.38%
Reduce Expense Base	7.53%

Governance Workflows

➤ Major Workflow

Business Case

Requestor submits the business case with Problem Statement, Expected Benefits, Cost and Resource estimates .

Department Review

Department approval of the request for PMO consideration.

Steering Committee Review

Steering Committee evaluation of Business Case budget and resource requirements.

Detailed Planning

Detailed Planning for approved projects with resource-loaded schedules and initial baseline.

Baseline Plan Review

Approval of baseline schedule and authorization to proceed with exection.

Project Execution

Project Execution with time and cost tracking, reforecasting, variance analysis and reporting.

Project Closure Review

Sign-off on project closure.

➤ Minor Workflow

Project Request

Requestor submits the simple request up to 300 hours of work and less than 2 months in duration.

Department Review

Department approval of the request for PMO consideration.

Project Execution

Project Execution with time and cost tracking, reforecasting, variance analysis and reporting.

Project Closure Review

Sign-off on project closure.

Proposals by Governance Phase

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Questions?