Project Intake & Prioritization

1 of 5 in the ‘Building Blocks of PPM™’ webinar series
Your Presenter

- Kenneth Steiness, PMP/PMI-SP MCP MCT
  - Managing Partner at Sensei Project Solutions
  - 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
The Building Blocks of PPM

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**Project Intake & Prioritization**
Capture project proposals with supporting business cases and prioritize against business drivers and existing workload.
**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

Resource Capacity

Project Demand

Project C
Project B
Project A
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

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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

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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
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

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<table>
<thead>
<tr>
<th>Driver Name</th>
<th>Priority</th>
</tr>
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<tbody>
<tr>
<td>Increase market share in existing markets</td>
<td>61.51%</td>
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<tr>
<td>Expand into new markets and segments</td>
<td>22.59%</td>
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<tr>
<td>Improve Customer Satisfaction Score</td>
<td>8.38%</td>
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<tr>
<td>Reduce Expense Base</td>
<td>7.53%</td>
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</table>
Governance Workflows

➢ Major Workflow

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

2. Department Review
   - Department approval of the request for PMO consideration.

3. Steering Committee Review
   - Steering Committee evaluation of Business Case budget and resource requirements.

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

5. Baseline Plan Review
   - Approval of baseline schedule and authorization to proceed with execution.

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

7. Project Closure Review
   - Sign-off on project closure.

➢ Minor Workflow

1. Project Request
   - Requestor submits the simple request up to 100 hours of work and less than 2 months in duration.

2. Department Review
   - Department approval of the request for PMO consideration.

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

4. Project Closure Review
   - Sign-off on project closure.
Proposals by Governance Phase

Project Proposals by Governance Phase
Which proposed projects do we have in the pipeline at the different workflow phases?

<table>
<thead>
<tr>
<th>Governance Phase</th>
<th>Project Description</th>
<th>Start</th>
<th>Finish</th>
<th>Days in Phase</th>
<th>Est. Cost</th>
<th>Work (hrs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Proposal</td>
<td>Colorado Web Site Design and Rollout</td>
<td>03/03/2014</td>
<td>10/12/2014</td>
<td>29</td>
<td>$250,000</td>
<td>2,496</td>
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<td>Defect Tracking System Upgrade</td>
<td>01/07/2014</td>
<td>12/01/2014</td>
<td>29</td>
<td>$350,000</td>
<td>3,230</td>
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<td>Create Integrated Monitoring and Control Interface for the Light Rail System</td>
<td>01/06/2014</td>
<td>10/06/2014</td>
<td>1</td>
<td>$280,000</td>
<td>13,674</td>
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<td></td>
<td>Integrate Version 7 of the CAD Tool with Internal Document Library</td>
<td>01/20/2014</td>
<td>05/19/2014</td>
<td>1</td>
<td>$145,000</td>
<td>5,564</td>
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<td>Generic Tablet Credit Card Reader Product and System Testing</td>
<td>03/01/2014</td>
<td>05/15/2014</td>
<td>1</td>
<td>$120,000</td>
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<td>Develop IT Inventory Bar Code Scanner</td>
<td>03/10/2014</td>
<td>07/18/2014</td>
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<td>Warehouse Inventory Tracking System</td>
<td>01/22/2014</td>
<td>06/20/2014</td>
<td>0</td>
<td>$145,000</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>61</td>
<td></td>
<td>32,642</td>
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<td></td>
<td></td>
<td>$1,455,000</td>
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<td></td>
</tr>
</tbody>
</table>

| 2 - Selection    | Develop Saber Tooth Network                                                         | 05/13/2013   | 11/22/2013   | 1             | $250,000  | 19,826     |
|                  | Document Library Keyword Search Tool                                               | 02/03/2014   | 08/01/2014   | 1             | $180,000  | 9,295      |
|                  | Voice Recognition Integration with GPS Unit                                         | 02/17/2014   | 09/25/2014   | 1             | $225,000  | 10,462     |
|                  | Develop the new Harpo Report Module                                                 | 01/13/2014   | 07/18/2014   | 1             | $185,000  | 7,791      |
|                  | Develop the Engine Sensor Analyzer for the 2015 Autos                             | 01/02/2014   | 07/01/2014   | 1             | $255,000  | 12,956     |
|                  | Custom Filters for Anti-virus Software                                             | 01/16/2014   | 05/29/2014   | 0             | $115,000  | 3,644      |
|                  |                                                                                     |              |              | 5             |            | 63,974     |
|                  |                                                                                     |              |              | $1,210,000    |           |            |
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Questions?