



A Comprehensive Look Into Project Management

Presented by Laura Crawford

February 13, 2018

Agenda

Project Planning

Budget and Baseline Variance

Schedule Management

Escalation & Change Management

Status & Issue Reporting

Question and Answer

Laura Crawford



Senior PPM Specialist

Laura has over 8 years of experience with Microsoft PPM and offers a unique combination of business, project management, and technical expertise. Laura is an expert at envisioning and delivering solutions that utilize technologies across the Project Online, SharePoint and Business Intelligence platforms. Laura holds an BS from State University of New York College at Oswego and is a Microsoft Certified Trainer and a Microsoft Specialist.



Why PPM Works

- **Gold** Microsoft Certified Partner exclusively focused on Microsoft Project, SharePoint, and Office 365
- Some recent **Experience** includes Allergan, Medtronic, Plantronics, Shire, Synopsys and many more...



- We believe in **partnering** with you, **exceeding expectations** to build long lasting success.
- Our team's experience runs deep with Microsoft.
 - Over **200 Project Server implementations** and Trained **thousands** of students
 - Delivered **dozens** of Industry presentations (Microsoft Project Conference, Project Summit, PMI Conference)
 - Created **hundreds** of webcasts and blog articles
- We have contributed to the **new release of Microsoft Project and Project Server** for the past three cycles and share our expertise as volunteers for Microsoft, PMI, MPUG, and Project Summit.
- We **guarantee your success** and **our results** – we are not done until you are a satisfied client reference

Why Clients Choose PPM Works

Our Philosophy: We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1st
- Proven Methodology and Templates
- Competitive Pricing



Thank you for the information share today! You are so knowledgeable and a gifted presenter/teacher.

Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all

Large Boston-based Pharma Co, Director of Training

I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was by far the best and I found it very useful – thank you.

Sr. Project Manager Consultant, Large Legal Firm

Upcoming PPM Works schedule



Register at:

<http://ppmworks.com/events/>

Events/webinars:

- 1/30 - PPM Summit (Edina, MN) and Happy Hour – Come have a drink (or 2) on us

Demo Series

Every Tuesday at 1pm Eastern

- 1/30 – Successful Multi-Project Management
- 2/6 - Everything You Want to Know About Portfolio Management
- 2/13 - A Comprehensive Look Into Project Management
- 2/20 - Keys to Effective Resource Management
- 2/27 – Getting to your Data-Driven Decisions with Project Team Collaboration & Reporting



PPM Works

Hope to see you there!

Session Goals

Improve your Knowledge of Microsoft PPM Tools

Tips and Tricks for both New or Mature Organizations

Equip You to Get Started Today

Quick Reference on Steps to Get Started

Make the Most of Your Time

Fast-pace, Condensed Content with Time for Question and Answer

Project Planning

- Ideation Lists
- Project Schedule Templates
- Resource Engagements

File Task Resource Report Project View MASTERLINK Format Engagements Tell me what you want to do

Engagements Properties

READ-ONLY This project was opened in read-only mode. Check Out

Name	Proposed Start	Proposed Finish	Proposec Max	Engagement Status	Qtr 3, 2016			
					Jun	Jul	Aug	Sep
5 Scott Clausen	Fri 7/1/16	Fri 9/30/16	50%			50%	50%	50%
*	Fri 7/1/16	Fri 9/30/16	50%	Committed		50%	50%	50%
6 Kiran Khanvilkar	NA	NA						
7 Jacques Goupil	Fri 7/1/16	Fri 9/30/16	50%			50%	50%	50%
*	Fri 7/1/16	Fri 9/30/16	50%	Committed		50%	50%	50%

BROWSE ITEMS LIST SHARE FOLLOW

Version History Shared With Attach File Alert Me Workflows Approve/Reject Tags & Notes

new item or edit this list

All Projects By Department Find an item

Name	Project Departments	Start Date	Owner	Requester Name	Sponsor	Project Program	Project Priority	Risk Assessment	Budgeted Proje
Adderall	Submissions	7/25/2016	Jacques Goupil	Jacques Goupil	Jacques Goupil	Program A	High	Medium	\$50,
Feiba	Submissions	7/25/2016	Kiran Khanvilkar	Kiran Khanvilkar	Jacques Goupil	Program B	Medium	High	\$100,
VPRIV	Submissions	7/25/2016	Kiran Khanvilkar	Kiran Khanvilkar	Jacques Goupil	Program B	Medium	High	\$75,

Info

New

Search for online templates

Suggested searches: Projects Schedules Th

FEATURED **ENTERPRISE**

Constructio... New Store

Budget & Baseline Variance

Once projects have been baselined, variance can be tracked at the task-level and project-level.

Project-level variance tracking



Project Name	Overall	Schedule	Cost	Resour	Risk	Start	End	Phase
Highway Sewer Replacement	...	●	●	●	●	9/1/2015	4/12/2017	1.3 Selection
PPMW Site Development	...	●	●	●	●	10/9/2015	1/20/2016	PD Review
Goldlab	...	●	●	●	●	10/21/2015	2/17/2016	
New Customer Feedback App	...	●	●	●	●	11/10/2015	6/13/2016	1.1 Concept
Columbus Promo	...	●	●	●	●	11/12/2015	5/16/2017	
New Store 1310	...	●	●	●	●	11/13/2015		
Columbia Lab Merger	...	●	●	●	●	12/1/2015		
Delta Water Supply Plant	...	●	●	●	●	12/1/2015		

The screenshot shows the Microsoft Project interface. The 'Project' tab is active, and the 'Set Baseline' dialog box is open. The dialog box has 'Set baseline' selected, and the 'For:' section has 'Entire project' selected. A red arrow points from the 'Set Baseline' dialog box to the 'Task-level variance tracking' text.

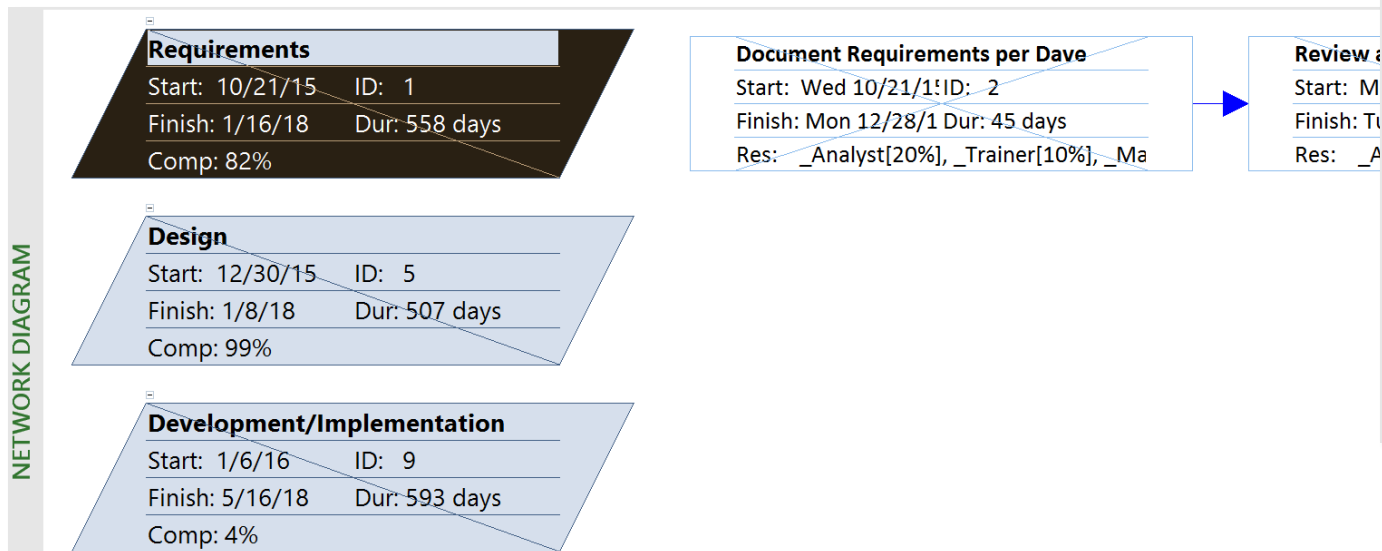
Task-level variance tracking

Schedule Management

Project Professional enables Project Managers to:

- Analyze the critical path
- Identify overallocated resources
- Track progress against baselines
- Reschedule uncompleted work

	Task Mode	Sct Inc	Task Name	% Complete	Duration
1		●	Requirements	82%	558 days
2	✓	●	Document Requirements per Dave	100%	45 days
3	⚠	●	Review and Approve Requirements	17%	12 days
4	📅	●	Requirements Complete	0%	0 days
5		●	Design	99%	507 days
6	✓	●	Document Design	100%	35 days
7	⚠	●	Review and Approve All Designs	99%	507 days



TEAM PLANNER

Resource Name	Tasks	Jan 7, '18	Jan 14, '18
_Trainer	Review and Approve Requirements		
Scott Clause	Review and Approve All Designs		
Kiran Khanvil	Development/Implementation		
Jacque Goupil	Review and Approve Requirements		
George Borheg	Other projects and commitments		

Escalation & Change Management

Change Control – identifying, documenting, approving or rejecting, and controlling changes to project baselines.

- Add a Change Control list on to project sites
- Create a list workflow to automate approval process
- Create Decisions list to capture escalations as needed

The image shows two screenshots of the PPM Works software interface. The top screenshot displays the 'Change Control' form, and the bottom screenshot displays the 'Decisions' form. Both forms have a sidebar menu on the left with 'Change Control' and 'Decisions' highlighted in red boxes.

Change Control Form:

- Home (highlighted)
- Notebook
- Documents
- Tasks
- Calendar
- Projects
- Project Details
- Recent
 - Change Control** (highlighted)
 - Deliverables
 - Risks
 - Issues

Form fields:

- Title *
- Initiator *
- Status of Request
 - Proposed
 - Impact being evaluated
 - Awaiting decision
 - Closed
- Approval Status (dropdown)
- Approved/Rejected By * (text input)
- Date of Decision (calendar icon)
- Change Comments (text area)

Decisions Form:

- Home (highlighted)
- Notebook
- Documents
- Tasks
- Calendar
- Projects
- Project Details
- Recent
 - Change Control
 - Deliverables
 - Risks
 - Issues
 - Decisions** (highlighted)
 - Site Contents
- EDIT LINKS

Form fields:

- Title *
- Description (text area)
- Comments and Rationale (text area)
- Decision Maker/Approver (text input)
- Decision Status
 - Approved
 - Pending
 - Rejected
- Decision Date (calendar icon)

Status and Issue Reporting



Goldlab [EDIT LINKS](#)

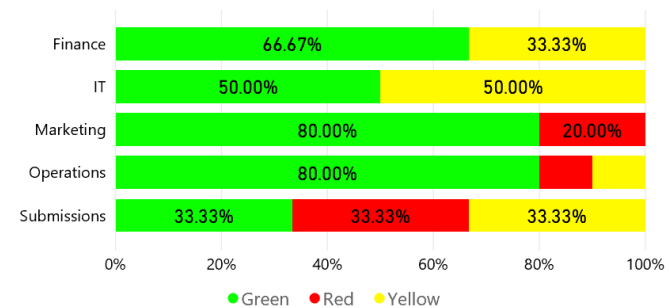
Issues ⓘ

[+ new item](#) or [edit this list](#)

All Items All Active Issues All Closed Issues

ID	Title	Assigned To	Status	Priority
Count= 8				
1	Developer Resources Not Available	☐ Scott Clausen	(3) Closed	(2) Medium
2	Change in requirement	☐ Kiran Khanvilkar	(1) Active	(1) High
3	Kevin and Karl Issue Test	☐ Jacques Goupil	(3) Closed	(2) Medium
4	New Issue	☐ Jacques Goupil	(1) Active	(3) Low
5	New Issue	☐ Scott Clausen	(2)	(2)

Project Health



Department	ProjectName	Start Date	Finish Date	Overall Stat...	Original Budget	Current Project Co...	Project Savings Goal	Project Savings Act...
Operations	Architect Series Door PX404	17-09-2016	19-07-2017	Red			250,000.00	200,000.00
Finance	Biolight	17-09-2016	19-07-2017	Yellow				
Submissions	Buminate	25-07-2016	02-02-2017	Yellow				
Submissions	C1414	25-07-2016	11-01-2017	Red				
Submissions	Cinryze	25-07-2016	13-02-2017	Yellow				
Operations	Cloudcom	17-09-2016	14-12-2017	Yellow				
Operations	Columbia Lab Merger	01-12-2015	13-06-2016	Green				
Finance	Columbus Promo	11-11-2015	11-11-2015				75,000.00	100,000.00
Submissions	D1515	25-07-2016	11-01-2017	Red				
Finance	Delta Water Supply Plant	01-12-2015	16-05-2017	Green			150,000.00	100,000.00



Microsoft PPM Demo

Question and Answer





LinkedIn: Laura Crawford and
<https://www.linkedin.com/company/ppm-works-inc->
Our Site: www.ppmworks.com
Blog: <http://blogs.ppmworks.com>

Calls To Action

1. Start incorporating these techniques today
2. Check out our Blogs / webcasts
3. Get LinkedIn with me (Laura Crawford)
4. Ask questions and **use the tool!**



Contact Us

We'd Love to Hear From You, Get In Touch With Us!

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