

Portfolio Management Made Easy with Project Online / Server

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PPM Works



Project

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



PPM Works Expertise



Project Server

Microsoft Project Server Implementations and Upgrades - let us assist you with your Project Server assessment, implementation, or upgrade. Our years of experience across all industries provide the foundation of our straight-forward team approach.



Project Online

Microsoft Project Online is a flexible online solution for project portfolio management (PPM) and everyday work. Delivered through Office 365, Project Online enables organizations to deliver the intended business value—from virtually anywhere on nearly any device.



Project Training

Our expert training has provided impactful learning to thousands for over fifteen years. We believe the best learning environment provides the opportunity to understand and practice the key concepts. Let our expert, patient trainers guide you to your Microsoft Project goals.



Support

PPM Works understands that you may have questions or need assistance on an ongoing basis or just a few times. Regardless of your situation, **PPM Works Support** options are flexible and meet your needs. Choose your Support plan today and get started.

PPM Works Other Services

Here at PPM Works, we provide clients with additional value everyday that extend beyond implementing Project Server, Upgrades, Training, and Support. Our experienced team is certified in Business Intelligence reporting, Collaboration, Project and Portfolio Management process development, Use Case scenarios, and more. Come explore all of our additional value-add services.

Mentoring

Business Intelligence

Process Development

Assessments

Collaboration

Staff Aug



PPM Works



Session Background



What is Portfolio Management?

Portfolio Management using Project Online (Real Scenarios)

Tips and from Lessons Learned in the Field

Fast Pace, Consolidate Presentation



What is Demand and Portfolio Management?

Demand Management

- **Capture** all Projects & Proposals
- **Establish** business value

Portfolio Management

- **Select** the Right Projects
- **Identify** business value

Project Management

- **Deliver** the Project
- **Realize** business value



PPM Terminology

- **Demand Management:** a unified view of all work in a central location. The process of capturing all project initiatives to gain visibility, standardize data collection, enhance decision making, and instill governance to all initiatives
- **Project Portfolio Management:** “the centralized management of one or more portfolios, which includes identifying, prioritizing, authorizing, managing and controlling projects, programs, and other related work to achieve specific strategic business objectives” – PMI®
- **Project Portfolio:** a collection of projects or programs and other work that are grouped together to facilitate effective management and share the same cost or resource constraints
- **Business Drivers:** unique, measureable strategic business goals
- **Impact Statements:** the description associated with project impact rating levels from none to extreme



PPM Terminology

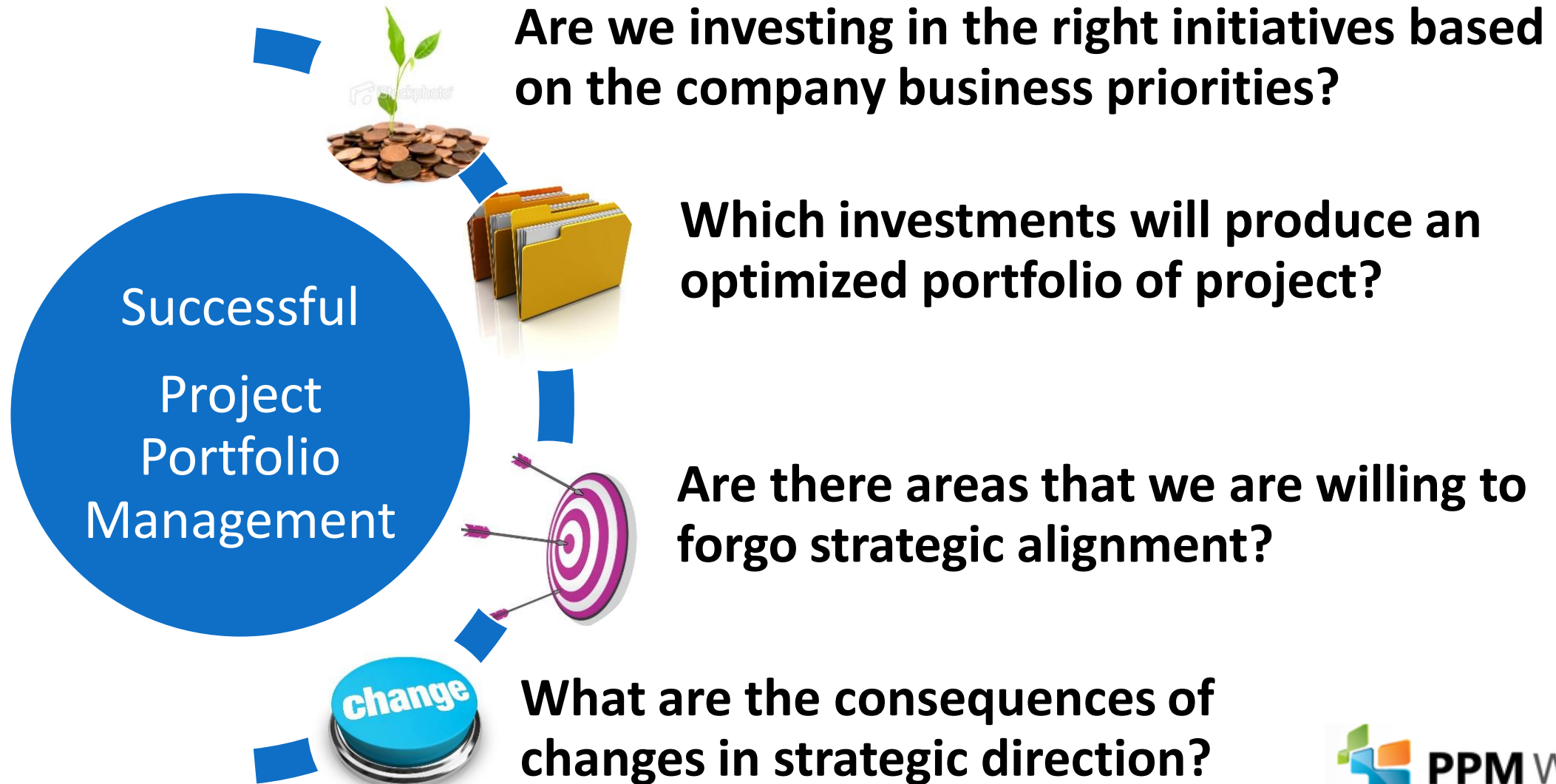
- **Portfolio Analysis:** Analyzing and committing projects that will yield the most value (ROI) for the portfolio
- **Cost Analysis:** process of applying cost constraints
- **Resource Analysis:** a subset of cost analysis; process of applying resource constraints
- **Governance:** provides a set of guidelines to effectively create and deliver all types of work, enhance accountability and align spending with the organization's strategic objectives



Benefits of Portfolio Management

- **Right mix of Projects:** Optimize the returns on the **entire** portfolio
- **Balanced Risk:** Just like your Stock/Investment Portfolio - Minimize risks and optimize returns
- **Balanced Resource Allocation:** PPM quantifies and compares projects resources
- **Strategic Alignment:** Redirects projects with business objective change
- **Optimize Budget:** Align projects (investments) with
- **Project Success:** Elevates communication and ensures projects receive the support for success and ensure alignment between projects and business strategies.

Successful Project Portfolio Management





Current Situation

After learning of an Executive decision to provide increased visibility to all proposed ideas and projects, your manager has asked you to present an improved project selection process to the Steering Committee at the end of the week. You know of an Idea list in Excel and that the Executive Team doesn't know what they always want.

Together with your manager you get more clarity on the Executive Team requests:

- 1) Capture all ideas
- 2) Provide simple to use reports for all ideas by Department and Sponsor
- 3) Leverage Corporate PPM Solution (Project Server 2013) including Stages
- 4) Use project prioritization by project score and ROI
- 5) Analyze ideas by cost and resource constraints
(Budget is \$1.2 Million with Regulatory Projects: Biolight and Cloudcom)
- 6) Use project prioritization by project score and ROI
- 7) Provide an easy way to create projects for good ideas



Goal and Challenges

Goal: Create an easy to use tool for an Excel-centric organization that is easy to update, track and manage.

Challenges:

1. Executive Team does not know what they really want but they want something NOW.
2. Team is very Excel-centric
3. Prioritization of projects needs to include Score and ROI
4. *Project Prioritization is currently not being done at all*
5. Project Server 2013 is only being used for projects

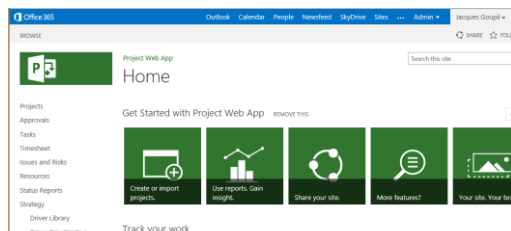


Portfolio Management Made Easy

Project Online / Server 2013

Create Projects

- Excel Idea List to SP List
- Excel Reports (based on ideas)
- Create projects from ideas
- Leverage Schedule Templates
- Leverage project workflow and stages



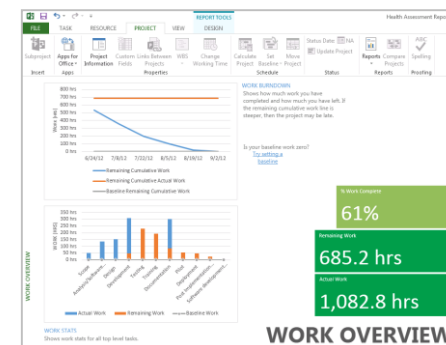
Select the Right Projects

- Project Prioritization
- Cost/Benefit Analysis
- Project Selection
- Score and ROI Prioritization
- Force-In / Force-Out



Plan & Manage

- Plan and Manage the projects
- Resource Management





Management Request #1:

Upper Management has asked you to organize all company ideas and proposed projects and provide helpful reporting by department and sponsor. Your company currently has a list of all ideas in Excel but not everyone can access the Excel Spreadsheet.

Goal: Create an easy to use tool that will be easy to update, track and manage and accessible to all.

Challenges:

1. Upper Management does not know what they really want
2. Implement solution that is easy to use
3. Team is very Excel-centric



Request #1: Capture All Ideas (from Excel)

Everybody loves Excel – we use it for everything. SharePoint allows you flexibility and is out of the box.

Let us walk through the ability to:

- 1) Capture all ideas
- 2) Provide simple to use reports for all ideas by Department and Sponsor



Request #1: Capture All Ideas (from Excel)

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Request #2: Creating Projects from SP List

Upper Management has asked you to organize **Leverage Corporate PPM Solution (Project Online / Server 2013) including Stages**

Goal: Create an easy to use tool that will be easy to update, track and manage and accessible to all.

Challenges:

1. How do you create several projects quickly and easily?
2. How do you leverage the current Project Online / Server 2013 environment?



Request #2: Creating Projects from SP List

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Request #3: Prioritize and Select Projects

Upper Management has asked you to organize **Prioritize ideas based on Score and ROI**

Goal: Provide an easy to use solution for project prioritization and project selection.

Challenges:

1. How do you prioritize by Score and ROI?
2. How do analyze both resource and cost constraints?
 1. Budget is \$1.2 Million with Regulatory Projects: Biolight and Cloudcom)



Request #3: Prioritize and Select Projects

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Request #4: Committing Portfolio Selection

Upper Management has asked you to organize **Easily create projects for all ideas that were selected by the Steering Committee**

Goal: Provide an easy to use solution for creation of projects for PMs to manage and complete through project closure.

Challenges:

1. How do you get all your selected projects to the PMs to manage?
2. How do you leverage the existing Project workflow?



Request #4: Committing Portfolio Selection

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



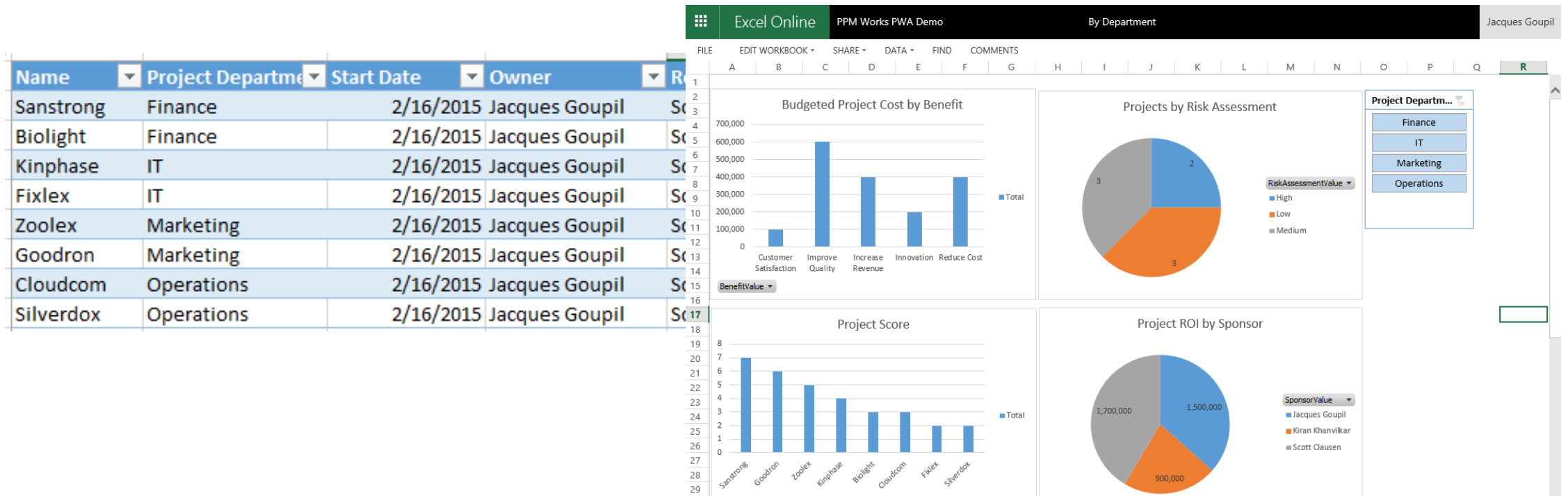
Recap: From Excel to Advanced Portfolio Management solution

1. Online visibility into all ideas at your organization (via Excel to SP)
2. Reporting on Ideas: Budgeted Cost by Portfolio, Department, and Sponsor (Excel Reports)
3. Leverage Corporate PPM Solution (for Project Creation and Workflow)
4. Cost and Resource Analysis (via Portfolio Analysis)
5. Strategic Value selection of projects (Project Selection)
6. Project Commitment (for Project Managers to manage projects)



Microsoft Portfolio Management Toolkit

Email for a copy of the Project Server / Online Portfolio Management Toolkit info@ppmworks.com



Call to Action



LinkedIn: www.linkedin.com/company/ppm-works-inc-

Our Site: www.ppmworks.com

Blog: <http://ppmworks.com/blog/>

Calls to Action

1. Start incorporating these techniques today
2. Email for the Microsoft Portfolio Management Toolkit info@ppmworks.com
3. Check out our Blogs / webcasts
4. Get LinkedIn with us
5. Let us know if you have any questions

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