Project Management for the Masses

Five Key Building Blocks to Create an Enterprise-Wide Discipline

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We all manage projects everyday. The headline projects are the ones that we tend to hear about – often led by IT and managed through a project management office (PMO). They use formal approaches like Agile or Waterfall and are built with a complex infrastructure. However, those represent only a portion of the projects that an organization undertakes. For most projects however, we do not need to have a deep understanding of these project methodologies to benefit from the use of a project management platform.

It can be far easier and less daunting – all projects can succeed with just five basic building blocks, and that's what we want to look at in this whitepaper. Once these five key steps are understood, anyone can leverage a project management platform. While the larger, more complex projects will need to have more structure and detail than the smaller and simpler initiatives, the concepts remain consistent: in all business areas, for all project types, and in all instances.

The benefit is that you will end up with a portfolio of all projects and a clear view into deadlines, budgets, and resource allocations – and you can easily share this information across the enterprise. Whether you are in IT or creative services or facilities, these basic building blocks will apply.

1 START FROM THE RIGHT PLACE – INTAKE AND GOVERNANCE

The first building block we must consider is not actually related to delivering projects, but rather selecting them. In virtually every organization, there is more work proposed than can be delivered with the time and resources available. As a result, there needs to be an effective way of reviewing proposals and selecting the ones that make the most sense for the business. Consider IT as a simple example. IT receives help desk tickets on a regular basis and a number of those tickets reveal problems in systems that need projects to fix – several people working together over the span of several weeks.

There simply aren't enough people for that to happen every time, and not every problem has the same level of impact or importance. The organization must therefore have a process in place to review proposals and determine which ones will be approved, which will be scheduled for later, and which problems we must live with. That's where intake comes in. In IT there may be a formal process that requires forms to be completed and be reviewed by a group of managers. In other business areas, it may be nothing more than a manager reviewing the idea with his or her staff and deciding whether it is a good use of time. The mechanics of the process don't matter, what's important is that the review occurs. That review must consider not just that we make the right choice between two projects, but also that we are making the right choice when prioritizing between project and other work.

There may be occasions where a project is approved at intake, but while working on it something changes. That's where the second element comes in – governance. Intake helps ensure we only start projects that are adding value to the business, governance helps ensure that value still exists. At key points, management reviews the project and confirms it is still a good use of time and resources – it's still helping the business more than anything else those people could do. If not, then the project must be stopped before more investment is made in something that isn't going to be able to generate the required return. Every department can benefit from instituting a proper intake process.

SPOTLIGHT:
Boston College Embraces Project Management Discipline

A single repository or system where you can plan, track, and manage the entire portfolio of work is really very valuable. The ability to have a complete picture of what our resources are scheduled to and plan that out six, eight, nine months or more into the future is one of the key areas the tool has made a difference. It has helped us with resource capacity planning. The ability for resource managers to have complete control over requests that come in for their specific resources has been very useful and effective. Project managers also appreciate the ability to request specific individuals for specific projects.

Denis Walsh
Director of Project Planning and Portfolio Governance
Boston College

2 MAPPING FRAMEWORK TO PROCESS

Once a proposal has been approved during intake and is an official project, the next building block comes in to play. This is the process of determining how to deliver the project. In formal project management that usually means a decision between a waterfall or Agile methodology, or increasingly a hybrid approach that combines the two. However, if the project is a group of people coming together within a Marketing department to organize a one-off customer event that isn't going to work. People don't know about either of those approaches, and they don't care because it's not relevant to them. What they do care about is having an easy to use project plan with associated documents, timelines, budgeting, and a way to allocate resources.

This is where the right project management software can really help. Organizations that have invested in the right tools will be able to use those tools for all projects, regardless of the experience of the people working on those projects, or the level of complexity. Consider the idea of a simple approach to project planning that captures each piece of work on a virtual 'card'. Each card has basic information on the task it represents: who is going to do it, the type of work involved, etc. That card can then be identified as 'not started', 'in progress,' or 'complete,' and dragged between those columns as the work gets completed in a simple workflow. Some groups may use this to track content creation (such as a brochure), to track which equipment has been calibrated, or which employees have gone through performance reviews.

For a sophisticated Agile team, that may be a KANBAN board and it may have a number of overlays added that provide more detail and more structure. To someone in marketing, it's a "card wall" and helps them manage the work with no learning curve and in a very intuitive fashion. Essentially the tool is helping to map project approaches to the way that people want to work together, supporting collaboration and effective work completion without requiring specialist knowledge. That's a theme that contributes to the rest of the building blocks that we're going to look at. The idea is that anyone of these project methodologies can be leveraged at a more basic level to help organize, prioritize, and track work across all departments.

> *"We can unite the marketing team under a common process, streamline marketing projects, and work towards resource management across the team."*
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> ~ **Deanne Belshe** | Digital and Web Manager, Marketing Communications | Johnson County Community College

3 A COMMON, BUSINESS FOCUSED LANGUAGE

Every specialist function creates its own language – terminology that is unique to that function but causes unnecessary confusion beyond it. Terms like KANBAN, Gantt or any of the other massed jargon that is common to project management create barriers between project management experts and everyone else. In a world where everyone must be involved in project management at some point, that's a significant problem that needs to be addressed.

What organizations need is a common language for all projects that is built upon the business language that everyone already understands. As we saw in the previous section, the right project management software can help here, presenting project management functionality in an accessible, user friendly way that avoids the need for specialist training or knowledge, without compromising the ability to deliver effective projects. However, organizations should not rely solely on their software for this element.

Project management experts, whether in a formal PMO or on an individual basis, must communicate with other business areas in terms that are relevant to those areas. IT is again a good example. IT will work on several projects that are self-contained within the technology function – network or server upgrades, security updates, etc. However, they will also be working with many different business areas on projects that support those areas – procurement and implementation of specialized software, updates to a custom-built application, etc. This kind of project requires information to be 'translated' between the project experts in IT and the business experts in the functional area. This translation should always be the responsibility of the IT project team – explaining concepts in terms of the impact to the business, not as technical impacts that will mean nothing, and may result in the wrong decisions being made.

If this translation doesn't occur the trust that is required between different business areas will break down. The lack of understanding created by technical language will undermine belief in the ability to deliver the right results. This will have several undesired impacts: especially in technology. Business areas will go directly to third party vendors who are capable of speaking to them in business language and will make commitments that IT departments then have to support – without the ability to conduct any due diligence ahead of time.

4 TRACKING AND MANAGING RESOURCES

The complex nature of modern organizations makes this next building block critical. No organization, indeed no department, can focus only on one or two things at a time. They have their regular workloads to manage, they have several different projects on the go, and they are supporting project work from other business areas. Keeping track of this work accurately is critical to prevent things from being missed – with significant business impacts happening as a result. That's why the ability to track and manage resources across a portfolio of projects is critical.

From simple tracking of how much time is being spent on a project, to understanding whether we have enough people, and enough skills, to complete the planned work, resource management is fundamental to effective project delivery. The base unit of resource management is time tracking: the ability to accurately, easily and consistently capture who is doing what and how long is being spent on each task. A quarter century ago this process was about making sure people were working as hard as they should be; today things are very different.

Time tracking today is about understanding the accuracy of work estimates, identifying areas where more people are needed, establishing when people will be available to work on something else, etc. This information forms the foundation of how organizations understand the work they have underway and the work they have capacity to deliver in the future. Time tracking must be a fundamental part of how work gets done – another reason why investing in the right software is critical. Information will only be complete and accurate if the submission of that information is integral to how work gets done.

Organizations must also understand how to leverage time and resource information. Understanding what has already happened (time tracking) is important; understanding what is going to happen is critical.

Proactive resource management, the provision of the right people in the right place with the right information at the right time, is what ultimately allows organizations to succeed at their current projects. That means understanding where bottlenecks are being created, where excess capacity exists, and how resources can be moved around to relieve those issues. Over a longer timeline, organizations must understand their capacity for delivering projects and how that aligns with the project work that is expected to occur. It takes time to hire and train staff and there must be a proactive plan to prepare the organization for the work ahead. Those plans must then be consolidated from each department by HR to develop an enterprise-wide hiring plan with organizational visibility.

This is an aspect of project planning that is understood in the areas of organizations that commonly see a lot of project work, and where the skills needed evolve rapidly, such as software development for example. However, the same approach must be used in all business areas, indeed it is sometimes more important in specialist business functions where there are more 'single points of expertise': individuals with specialist skills or knowledge who are in high demand for projects.

SPOTLIGHT: Optimizing Resources

East Carolina University Optimizes Resources

A discussion with East Carolina University on its transition to a holistic approach to service management across the campus

~ **Hector Molina** | Director, Central Project Office, ITCS | Eastern Carolina University

The old tools we had were quite clunky and generated a lot of dissatisfaction from our end users and IT leadership. Pulling reports was especially difficult – at the time only a few people really had the skill set to do this. It was a nightmare from an administrative perspective as well – it took a lot of time and workarounds to get things working at a passable level.

We wanted to improve the overall user experience for the university community and enable greater reporting for our technicians within various teams.

Project Portfolio Management + Service Management

Initially, we were looking for a dedicated project and portfolio management (PPM) solution and were evaluating a number of vendors but TeamDynamix wasn't one of them. We caught wind of another institution in our system using TeamDynamix for projects and saw that it combined project, portfolio, and IT service management into one platform.

Finding a platform that can do both project portfolio management and IT service management was a game changer for us and led us to accelerate the replacement of our IT service management (ITSM) solution. The people who work both tickets and projects don't want to use multiple systems, they want one solution that works for everything.

Resource Optimization

TeamDynamix has changed the way we do projects; our resources now have all the information they need at their fingertips. The Resource Management module in particular has been crucial to us. We're now able to understand the true allocation of resources and prove to our leadership that we need more people. Overall, it's improved our stakeholder relationships. Our leadership is really excited about the fact that resources can self-serve rather than having to send emails to track down information. Our clients like having visibility into the status of projects and being able to see the degree of completeness. The PPM tool was only going to be used within the IT department but it's shown so much potential that other departments have started using it.

> *"The platform helps me generate data that is helpful in answering questions from our Technology Governance Group. I can now use real data to answer their questions, instead of giving them just a gut feeling for the numbers. When you start to do that, it basically becomes an iterative process to see how you maximize these assets to achieve organizational goals."*
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> ~ **Tom Pagano** | Chief Information Officer | Johnson County Community College

5 REPORTING – TURNING DATA INTO INFORMATION

The final building block builds upon the concepts we've outlined in the previous four: the ability to generate meaningful information from what is happening on projects. Reporting is critical to the success of every project – it is the way we understand what is happening, and more importantly what must be done about it. Effective reporting provides decision support, helping leaders to interpret past events and make adjustments that will help ensure the project is still capable of delivering successful business outcomes.

To achieve that, reporting must be able to convert the raw data captured on projects and present it as information that is meaningful for each person viewing it. This is more complex than it may seem: information must be presented in such a way that the finance team can analyze the cost information, the department head can see everything impacting his or her area, resource owners can see all the projects their staff are working on, etc. And of course, all that information must come together in a way that provides a complete picture of what is happening, on individual projects and for the entire organization. This information is quite often used to determine if a group has the right number of resources, and to justify additional resources when the project intake process is backed out.

Any gaps in the data used to generate reports, any difficulties in presenting data in business context, and any opportunities to misinterpret the underlying message of that data, will reduce the ability to manage both individual projects and entire organizational portfolios. Worse, such problems may not be evident, leaving organizations making decisions they believe to be based on accurate information and only discovering their mistake when it is too late to do anything about it. Modern project reporting must provide a business focused window onto what is happening on projects, all projects, whether managed from an IT PMO or as one-off business initiatives.

BRINGING IT ALL TOGETHER

These five individual building blocks are critical to the success of every organization today. However, building blocks on their own are of limited use – the real gain comes from actually using them to build something. Project management must not be viewed as a specialist discipline restricted to certain areas of the organization. Indeed, those with advanced knowledge in the discipline can help guide and can operate as stewards, but in the end, the entire organization should look to adopt a formal framework vs. allowing work to be absorbed without any consideration. Project management as a core discipline must be understood to be a critical business capability that every employee must have in their repertoire. That can only happen when the organization is built to keep project management straightforward, adding only the layers of structure that are required for each initiative and leaving the more complex view of the discipline to those who are true professional experts. This approach can also only be sustained when the organization has invested in the right project management software that can adapt to different levels of sophistication and complexity while providing consistent, complete and accurate reporting.

To truly make this work, organizations must recognize the importance of the project management discipline, and invest in it accordingly.

About TeamDynamix

TeamDynamix cloud-based work management software gives service organizations in non-corporate environments the ability to align, work together, and simplify their work management processes. TeamDynamix transforms IT from order taker to strategic innovator. Colleges and universities, K-12 districts, state and local governments, and nonprofits use the TeamDynamix project portfolio and service management platform to work together smarter, faster, better.

About ProjectManagement.com

Since 2000, our mission has been simple: To make project managers more successful. ProjectManagement.com is the experience bridge that fills in the gaps—providing help to project managers in a number of ways. It is a community, your community, for project managers in Information Technology and other industries. We are your one-stop shop for PM answers, helping get you "unstuck"—and confidently meet every new challenge that comes your way with over 4,000 articles from industry experts, over 1K Deliverable Templates to save you time and more than 550K peer connections and experts to offer specific advice.

About PMI

Project Management Institute (PMI) is the world's leading association for those who consider project, program or portfolio management their profession. Founded in 1969, PMI delivers value for more than three million professionals working in nearly every country in the world through global advocacy, collaboration, education and research. We advance careers, improve organizational success and further mature the project management profession through globally recognized standards, certifications, communities, resources, tools, academic research, publications, professional development courses and networking opportunities.