ENTERPRISE PROJECT MANAGEMENT (EPM) WORKSHOP

CHAPTER 3: DEPLOYING EPM

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Section 4
Deploying your EPM environment

Successfully deploying EPM

- ❑ Common expectations
- ❑ It's not a technology project, it's change management
- ❑ Instituting organizational culture change

We all want EPM... don't we?

❑It seems so desirable...

    ❑ Integrated resource capacity planning

    ❑ Executive-level real-time dashboards

    ❑ Instant decision making

    ❑ Improved efficiency

    ❑ No more management-by-emergency

But what does it take?

❑Yes, a fully integrated and deployed enterprise project management (EPM) system is possible but before you get started have you planned what it will take to go live?

Common expectations

❑ It will be ready instantly

❑ It is all about the technology

❑ It's just like we do now but on the Web

❑ No one will require training… after all they already know MS Project!

❑ It will be very inexpensive

Most common request

"We just bought this EPM Software product... Can you come make it work?"

Our most common response:
"What would you like it to do?"

Most common reply
"Don't you know?"

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Establish deployment team

❑ Identify Key Stakeholders

❑ Identify internal expertise resources

❑ Engage external expertise (if required)
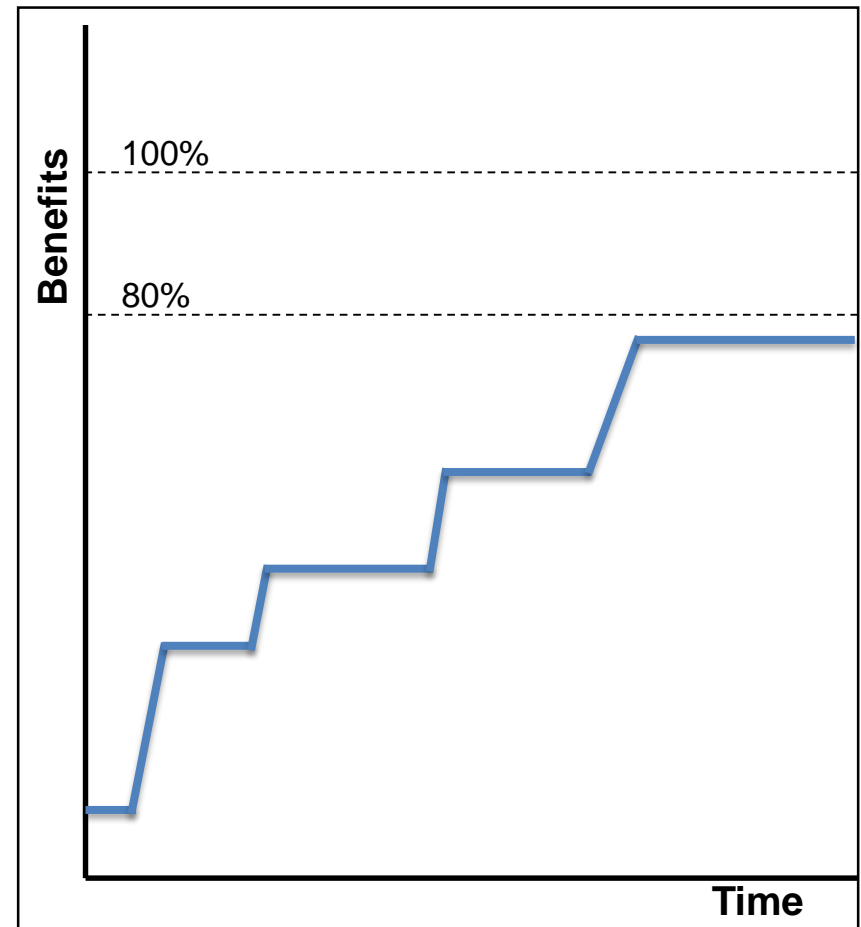
Identify Business Objectives

- ❑ Executive and Stakeholder workshops
- ❑ Identify management role impact
- ❑ Prioritize business objectives and create a Master Deployment Plan
- ❑ Establish milestones and metrics

Big bang or phased deployment?

Big Bang

Benefits

100%

Time

Phased

Benefits

100%

80%

Time
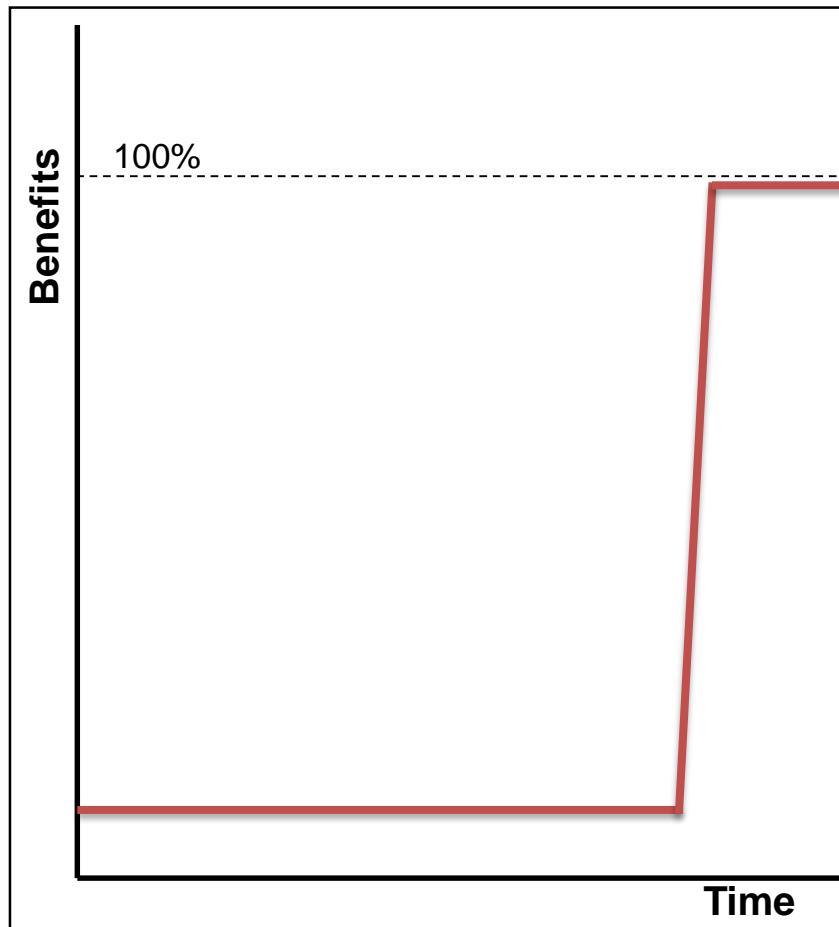
Big Bang or Phased implementation?

❑ Big Bang
- ❑ Better chance of reaching 100% of originally perceived benefits
- ❑ Better chance of reaching 0% of benefits because:
  - ❑ Project is cancelled
  - ❑ Team changes
  - ❑ Priorities change
  - ❑ Organization changes

❑ Phased
- ❑ Better chance of not getting to 100%
- ❑ Chances of getting some benefits are close to 100%
- ❑ Secret is targeting the biggest initial benefit for the lowest risk

Phased deployments are lower risk

❑It's natural to want to push every vector at once

❑We ask:

"For the first phase, what is the minimal deployment, the deploying of which will return a positive return on investment every cycle going forward?"

Phase 1
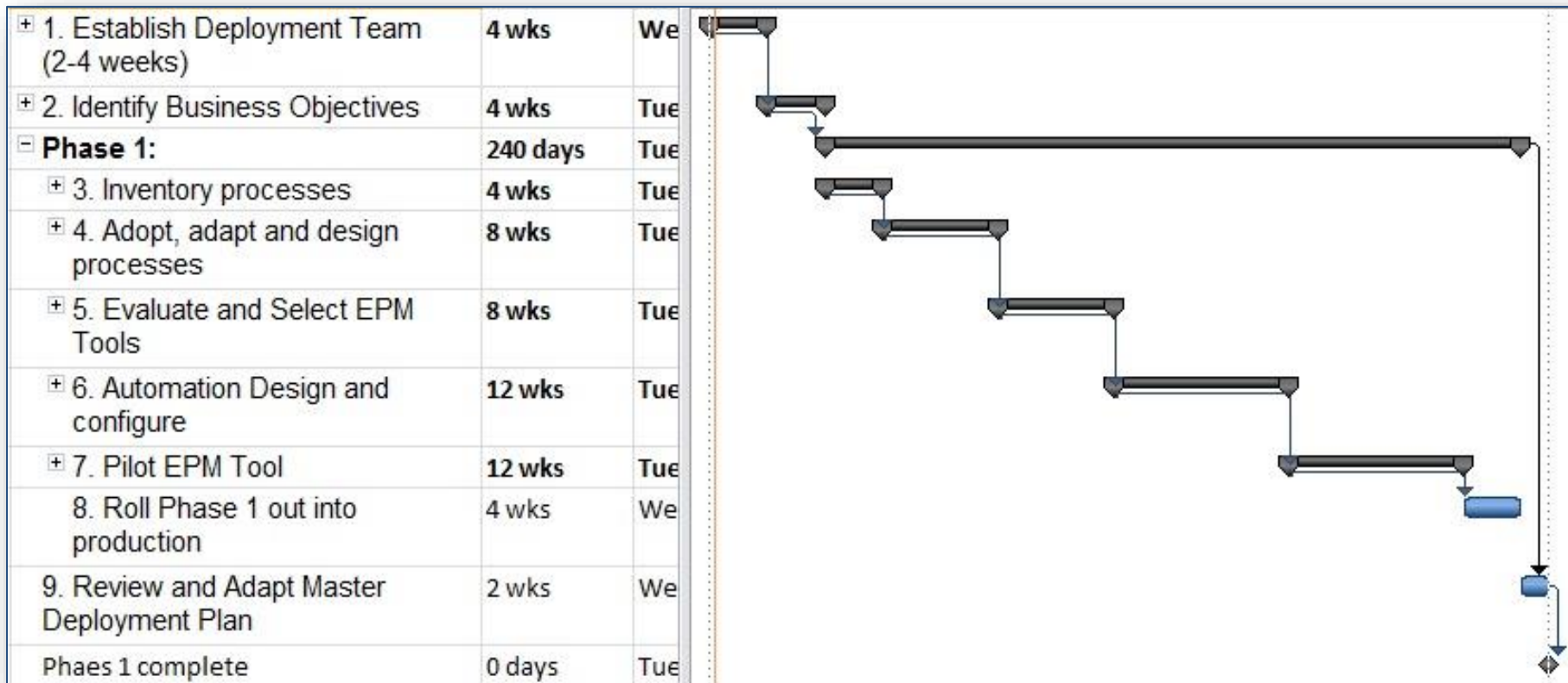
- ☐ Inventory processes
- ☐ Adopt, adapt, and design processes
- ☐ Evaluate and Select EPM Tools
- ☐ Automation Design and configure
- ☐ Pilot EPM Tool
- ☐ Roll out Phase 1 into production
- ☐ Review and Adapt Master Deployment Plan

Phase 2

❑ do steps 3 through 9 again

Phase 1 Schedule

That's 48 weeks..., yes, I said 48

1. Establish Deployment Team (2-4 weeks)	4 wks	We	
2. Identify Business Objectives	4 wks	Tue	
Phase 1:	**240 days**	**Tue**	
3. Inventory processes	4 wks	Tue	
4. Adopt, adapt and design processes	8 wks	Tue	
5. Evaluate and Select EPM Tools	8 wks	Tue	
6. Automation Design and configure	12 wks	Tue	
7. Pilot EPM Tool	12 wks	Tue	
8. Roll Phase 1 out into production	4 wks	We	
9. Review and Adapt Master Deployment Plan	2 wks	We	
Phaes 1 complete	0 days	Tue	

Schedule

❑ Establish Deployment team: 4 weeks

❑ Identify Business Objectives: 4 weeks

❑ Phase 1

   ❑ Inventory processes: 4 weeks

   ❑ Adopt, Adapt, design processes: 8 weeks

   ❑ Evaluate/Select EPM tool: 8 weeks

   ❑ Pilot EPM tool: 12 weeks

   ❑ Rollout of Phase 1: 4 weeks

   ❑ Review Phase 1 and adjust Phase 2: 4 weeks

                              Total: 48 weeks

So how to downsize our plan?

❑ Here's one way to decide on what should be in Phase 1:

❑**Ask**:

"What minimal configuration could be deployed that would return a positive return on investment ongoingly?"

❑**Not**:

"What's the most we can imagine accomplishing?"

The PMO Authority Dilemma

How do we change the organization when we have much responsibility but almost no authority?

CEO
Chief Executive Officer

The project management office is almost always a "dotted line" connection to management

Project Management Office

Chief Operating Officer

Chief Financial Officer

Chief Information Officer

Engineering Department

Marketing Department

Sales

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Solution deployment strategies

❑ Go for compliance first
  ❑ Spend your initial efforts getting the data stored in the same place – once people are mostly compliant, you can move to cross-project analysis
❑ Go for minimizing culture shock
  ❑ It's easy to look at a project environment and think of another, maybe better way to do things but there's a cost to culture shock – start with doing things as much the same as possible
❑ Start with the easiest group, not the hardest and definitely not the loudest
  ❑ Many people will want to jump on board – some because they want to see the implementation work, some just because they don't want to be left behind. Save your toughest customers for last.

Steps to EPM deployment success

❑ Make it a project. You are instituting a change in the underlying infrastructure of your organization, treat it like a corporate project

❑ Get a sponsor. Implementing a PMO is impossible without one management support

❑ Start identifying practices already in use across the organization

Next steps

❑ Look at where your data is now being stored. Moving it into a single structure is a good first step to being able to apply standards to it later

❑ Determine the best practices which should be deployed across the enterprise and;

❑ Those which could be left to the individual project manager

More steps

❑ Start identifying potential team members who are as committed as you are to the PMO process

❑ Start looking at where you hurt

  ❑ The benefits of implementing a project office will find no support in management unless it's to solve a particular problem

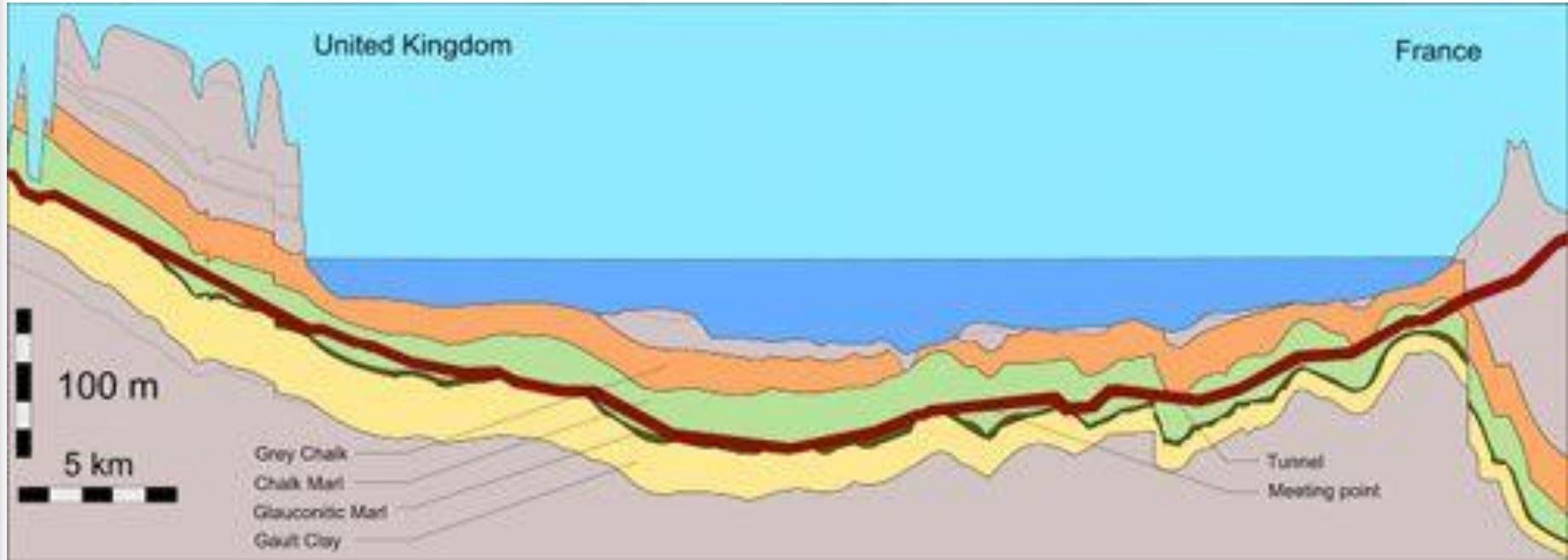❑ Identify potential pitfall areas which should be bypassed during the deployment

SECTION 5
PITFALLS, SINKHOLES AND HOW TO DIG YOURSELF OUT OF TROUBLE

Chunnel

Chunnel

United Kingdom   France

100 m

5 km

Grey Chalk
Chalk Marl
Glauconitic Marl
Gault Clay

Tunnel
Meeting point

British submarine

British "Astute" under construction

Quebec Hydro LG2A

LG2a Machine Room

Canadian Frigates

HMCS Halifax

Common pitfalls

❑ Unrealistic expectations

❑ No project planning for the project planning system

❑ No requirements or scope established

❑ It's all about technology – once it's installed, the problem is solved!

❑ No budget allocate

❑ We won't need training

❑ No executive sponsor support or too short term

Real-time project management?

❑Is real-time project management real?

Real Time Project Management

Baseline➜

←Actual

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Real Time Project Management

Baseline ➜

⬅ **Actual**

Real time project management... not

❑ Projects happen in real time but analysis of project data does not.

❑ Creating an EPM environment which updates data faster than you can make business decisions is at best a waste of time and at worst, tremendously disruptive.

Portfolio Management Pitfalls

Ending projects

❑ Portfolio management has little value if the process does not allow stopping a project before it's completed

❑ We can all see what's bad about stopping a project, but what's good about it?

❑ Under what circumstances should you stop a project and how can you go about it in the most effective manner for the organization?

Ending projects

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When the Horse Dies:Dismount!

Beating a Dead Horse

Dakota tribal wisdom says that when you discover you are riding a dead horse, the best strategy is to dismount. However, project managers sometimes try some of the following ideas they:

- ❑ Change riders
- ❑ Buy a bigger whip
- ❑ Rename the horse
- ❑ Stay very quiet while on the dead horse and hope no one notices
- ❑ Appointing a committee to study the horse.
- ❑ Send the rider for additional training
- ❑ Outsource the riding of horses
- ❑ Do a study of dead horses
- ❑ Harness two or more dead horses together to see if the cart will go any faster
- ❑ Add funding to increase riding performance
- ❑ Say things like, "This is the way we have always ridden this horse."
- ❑ Automate the dead horse to see if software can make it ride faster
- ❑ Reclassify the horse as "living impaired"

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Technology/Culture

❑ EPM is never a technology project no matter how much technology is involved

❑ It is always a culture change project; a change management project that should result in a change in behavior in the organization.

Why would we need training?

❑In 1980, cost of EPM Software: $250,000

❑Cost of training at 20%: **$50,000**

❑In 2010, cost of EPM Software: $1,000

❑Cost of training at 20%: **$200**

Change Management is key

❑ Some of the challenges you'll face include:

❑ Acceptance of centralized standards and who gets to make them

❑ Creating a common coding structure so data comes together

❑ Convincing everyone to participate

❑ Convincing management to support the project long-term

The EPM challenge survey

In completed EPM deployments, what challenges were experienced as an "extremely" or "somewhat challenging" aspect of deployment?

Challenge	Percent experienced
Culture change (user resistance)	**100%**
Lack of knowledge on EPM system and requirements	**100%**
Executive sponsorship	**80%**
Importance of PM to the Organization	60%
Long-term funding	60%
Current state of PM processes and practices	40%
Technological capabilities	40%
Competing initiatives	40%

*Preliminary Results of EPM System Implementation Benchmark Survey, Center of Business Practices, 2004

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Automate first?

Which is better:

☐ Automate first, then adapt your process?

or

☐ Change your process then automate?

Let's ask John Chambers

John Chambers, CEO - Cisco

❑ John Chambers, CEO of Cisco corporation, commissioned a study on the effectiveness of automating processes.

❑ The study found that for organizations which changed their process then automated, overall effectiveness increased from 21% to 25%!

John Chambers – again

☐ The study commissioned by Cisco CEO, John Chambers showed another interesting statistic. Automating without first changing the process, risked decreasing efficiency by as much as 9%!

SECTION 6
OVERCOMING CHANGE RESISTANCE

Overcoming Change Resistance

❑ Get sufficient authority and then impose the change

- ❑ How do employees thwart this method?

❑ Be democratic, take a majority vote

- ❑ What are the negative implications of this?

❑ Trim-tab

Buckminster Fuller

❑Who was Bucky Fuller?

Buckminster Fuller

❑ Who was Bucky Fuller?

In 1927 Fuller resolved to think independently which included a commitment to "the search for the principles governing the universe and help advance the evolution of humanity in accordance with them... finding ways of doing more with less to the end that all people everywhere can have more and more."

Turning the ship

Ship Rudder

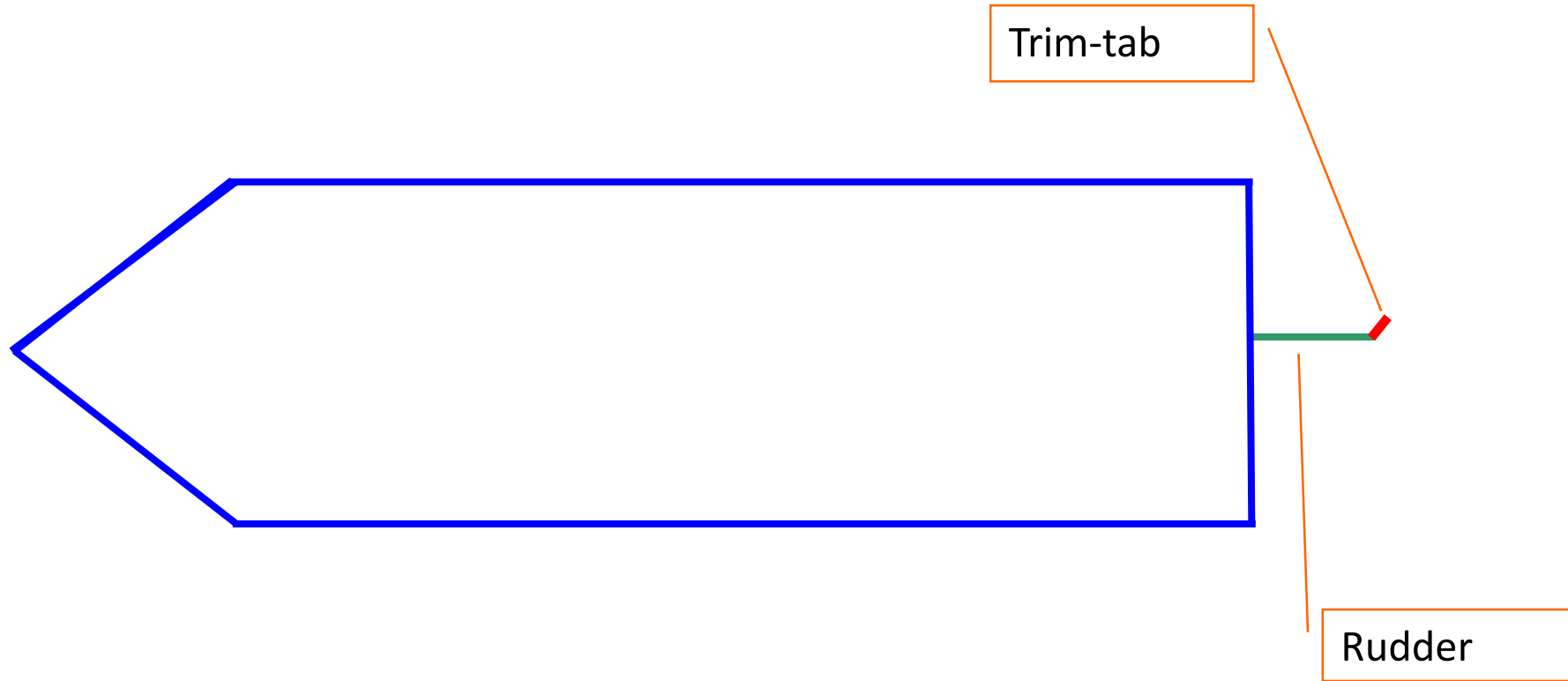# Buckminster Fuller's Trim Tabs

Trim-tab

Rudder

Trim Tabs

"Something hit me very hard once, thinking about what one little man could do. Think of the Queen Mary—the whole ship goes by and then comes the rudder. And there's a tiny thing at the edge of the rudder called a trim tab. It's a miniature rudder. Just moving the little trim tab builds a low pressure that pulls the rudder around; takes almost no effort at all.

So I said that the little individual can be a trim tab. Society thinks it's going right by you, that it's left you altogether. But if you're doing dynamic things mentally, the fact is that you can just put your foot out like that and the whole big ship of state is going to go.

So I said, call me 'Trim Tab'."

Buckminster Fuller

Bucky's gravestone
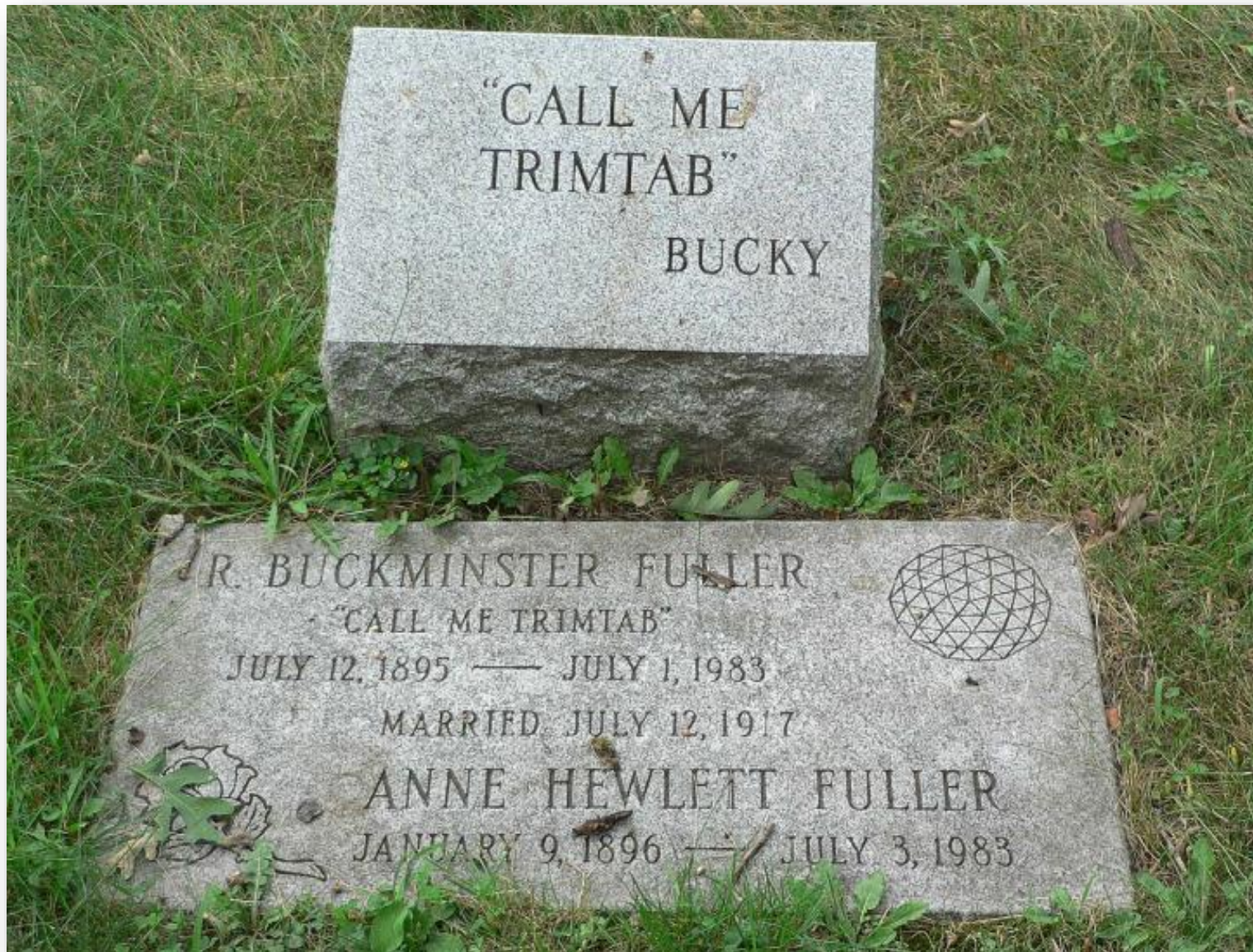
Overcoming change resistance

❑ Tools in your arsenal?

   ❑ You control the display

❑ Have a plan and manage like a project

❑ Have management sponsorship

❑ Return on investment for each type of user

   ❑ People will need to invest time and effort – what will they get back?

Overcoming change resistance

❑ Become the path of least resistance
- ❑ Templates
- ❑ Enterprise look-up fields pre-populated
- ❑ Easy to follow process

❑ Consider objections and ways you can overcome them.
- ❑ e.g.:
  - ❑ Consider a temporary amnesty
  - ❑ Consider establishing rules for project prioritization

❑ Communicate, communicate, communicate
- ❑ Seminars, lectures, white papers, presentations

Avoid the pitfalls

What we see most often:

- ❑ No charter
- ❑ No schedule
- ❑ No executive sponsor
- ❑ No budget except for software
- ❑ No dedicated team
- ❑ No success metrics

SECTION 7
WRAPPING UP

Is it worth it?

"If it is."

❑ That's a Zen answer which may seem trite but the bottom line is you have to look for yourself.

❑ Some organization will be better off just using Project Desktop and having a more loosely organized project process.

❑ Others will be able to use an EPM environment to great benefit. But the cost in effort and time isn't free.

Wrapping up

❑ Decide what EPM means to you

❑ Articulate the business *problem* before designing a solution

❑ Manage your EPM project *as a project*

❑ Do your requirements from the perspective of a business decision

❑ Manage your project as a change management project, *not* a technology project

A battle plan lasts, until contact with the enemy.

Napoleon Bonaparte

Resources

❑ **Today's materials:**

www.epmguidance.com/resources/mnpdd1.pdf

www.epmguidance.com/resources/mnpdd2.pdf

www.epmguidance.com/resources/mnpdd3.pdf

❑ **EPM Guidance Blog:**

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