From Agile to Portfolio

Does it really all belong together?

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EPM Guidance
Enterprise Projects

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Introduction

- Founder of HMS Software; publishers of TimeControl, a project-based timesheet system
- Over 35 years experience in project and timesheet systems
- Author of the EPMGuidance.com blog
- Has taught Advanced Project Management at McGill University
- Writing has appeared in:
  - Fortune Magazine, American Management Association's Project Management handbook, PMI's PMNetwork, Microsoft's TechNet, Computing Canada, and PM Times magazines.

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Objectives

1. How to distinguish the types of project management for different levels;
2. How to identify the basic elements of project management tools appropriate to the project management levels and;
3. Learn techniques to implement tools appropriate to different project management levels even when you don't have authority over that level.

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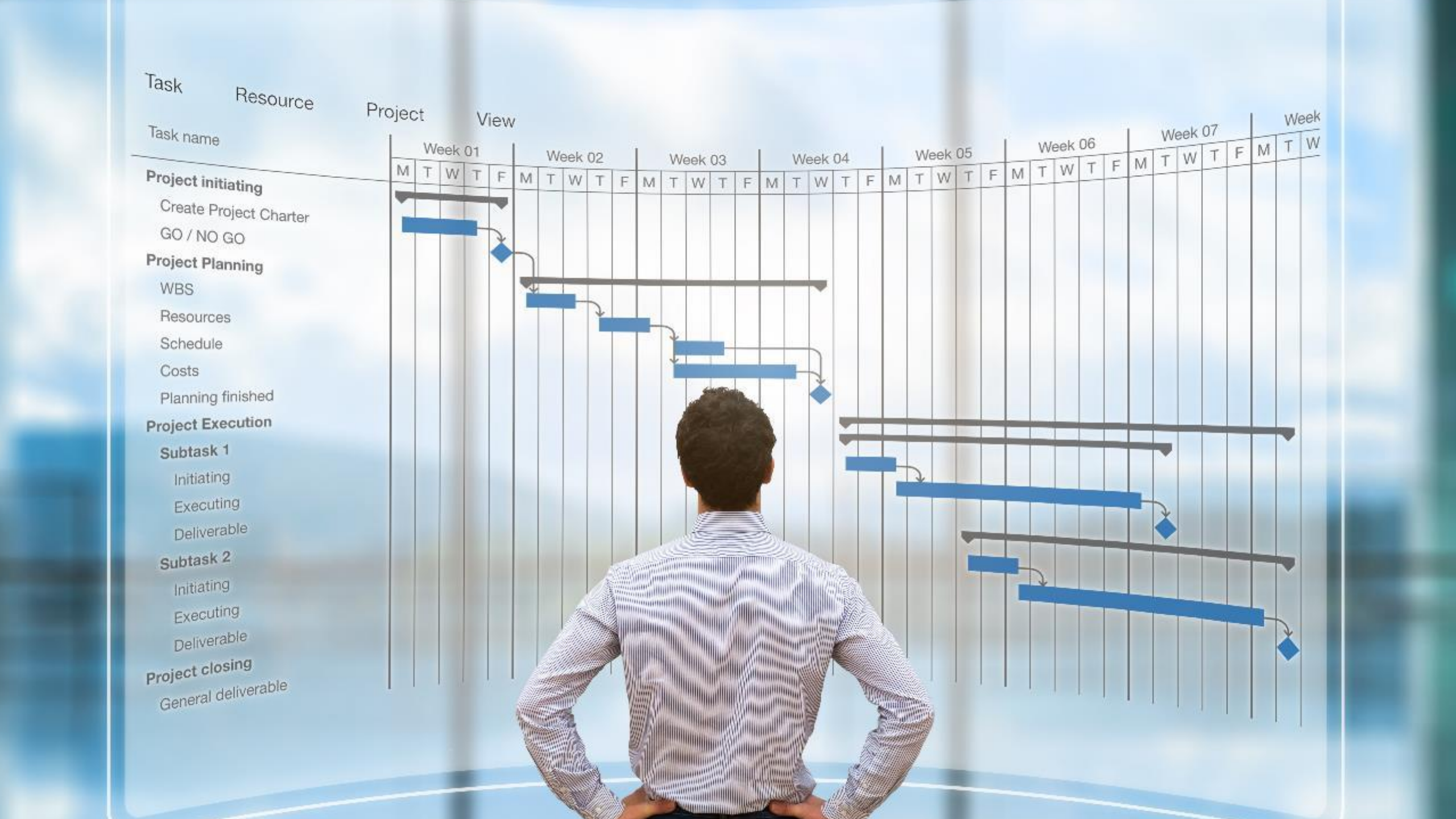
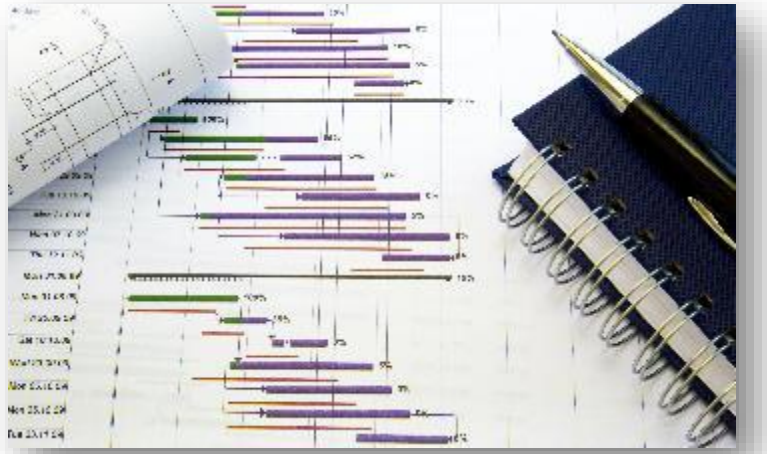
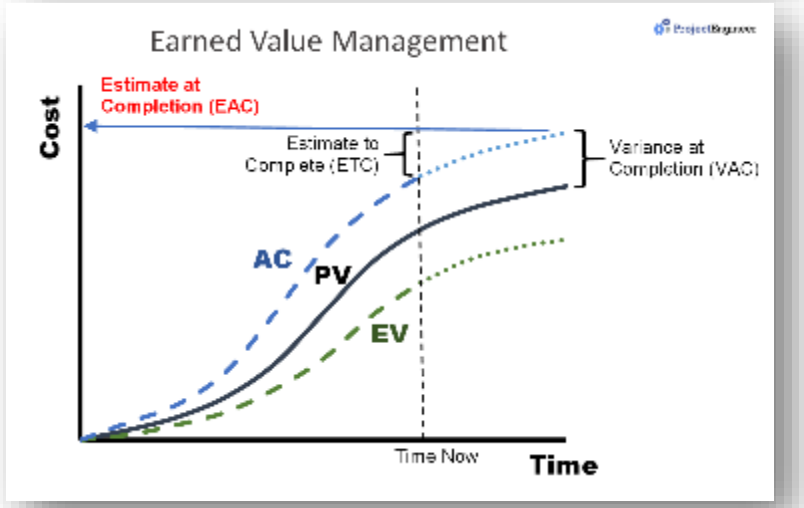
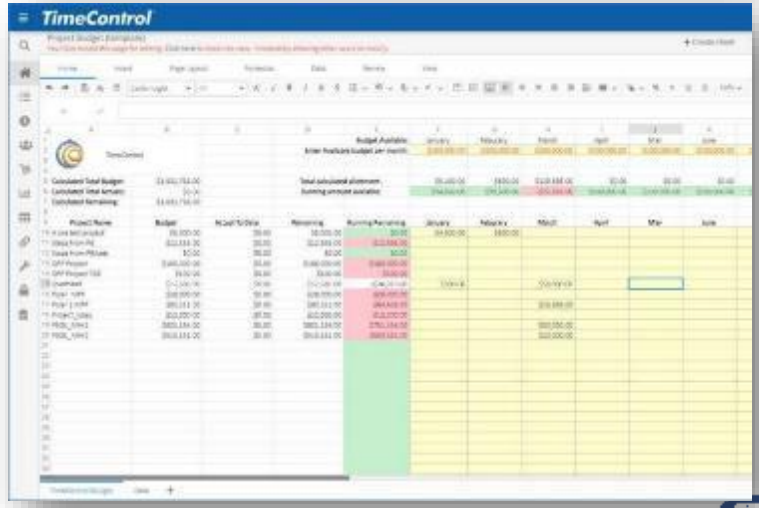

Task
Resource
Project
View
Task name
Project initiating
Create Project Charter
GO / NO GO
Project Planning
WBS
Resources
Schedule
Costs
Planning finished
Project Execution
Subtask 1
Initiating
Executing
Deliverable
Subtask 2
Initiating
Executing
Deliverable
Project closing
General deliverable
Week 01
Week 02
Week 03
Week 04
Week 05
Week 06
Week 07
M T W T F

We’re confronted in our industry by many competing perspectives. In our desire to comprehend we like to use that most human of traditions… we label things.







What would vendors recommend?

- Their own product can do everything you need
- This shouldn't be a big surprise
- When an external source makes a recommendation it will sound awesome but you need to think about what their motivation is
  - Software sales?
  - Commissioned sales
  - Hiring opportunity for them or their colleagues?
  - Increased use of their services?
- For today, let's work on carving our own path

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What are the Strategic, Operational and Tactical perspectives?

Strategic, Operational, Tactical

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Strategic

Strategic perspectives

- Time perspective: 1 quarter to 5 years
- Should we take on this project?
- Can we take it on and if so…
  - What will be the impact on other projects?
- What is the impact of this project on us if we accept it?
- What is the impact on us if we don’t accept this project?

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Strategic Decisions

- What will our budget be for the next fiscal period?
- What should our resource capacity be in terms of number of people?
- What projects should be continued?
- What projects should be authorized
- What key milestones will we drive the business around?

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Strategic Tools

- Annual budget
- Spreadsheet analysis
- Portfolio list
- Portfolio analysis
- Marketing projections

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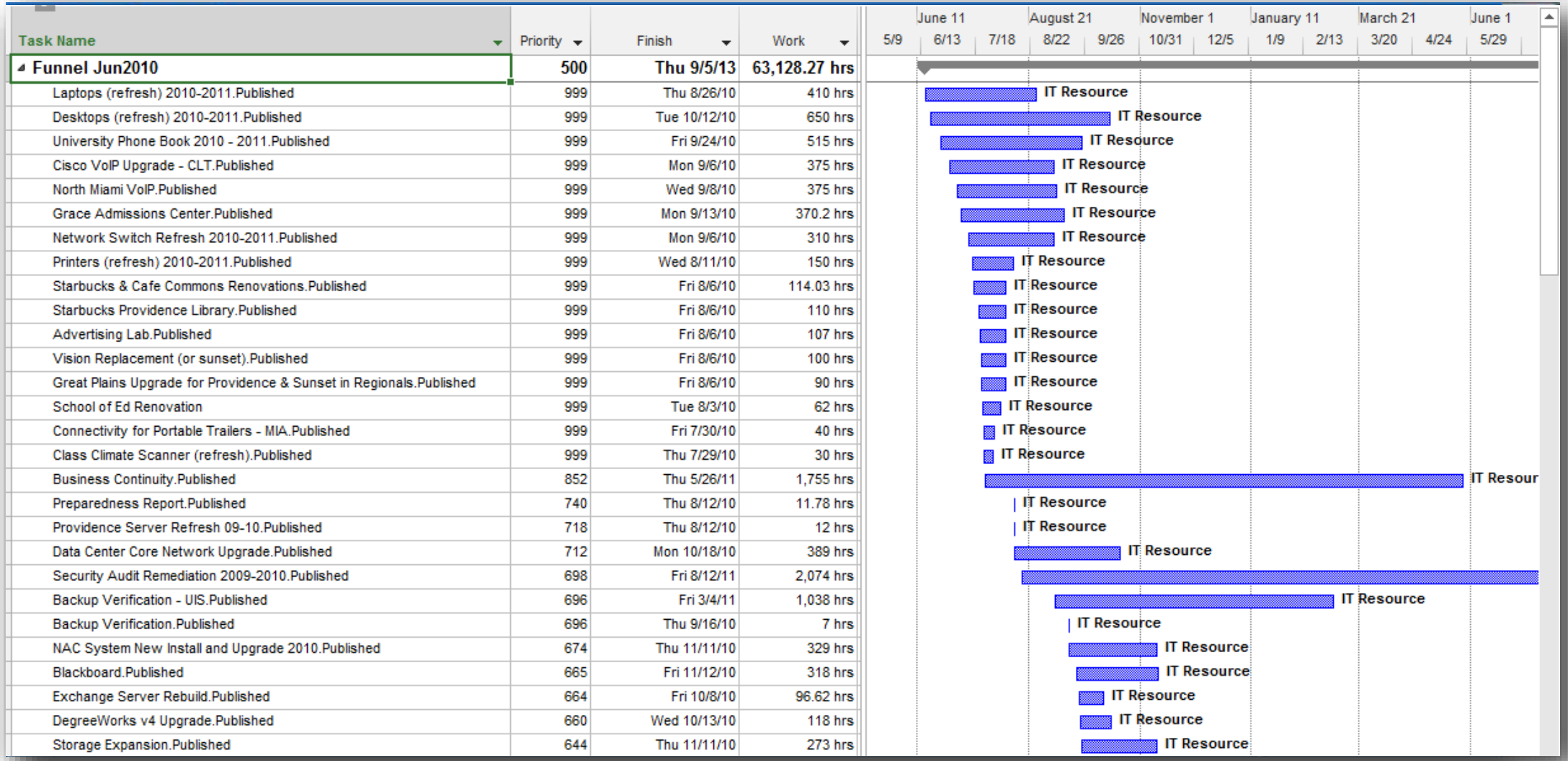
Strategic tools



Task Name	Priority	Finish	Work
Funnel Jun2010	**500**	**Thu 9/5/13**	**63,128.27 hrs**
Laptops (refresh) 2010-2011.Published	999	Thu 8/26/10	410 hrs
Desktops (refresh) 2010-2011.Published	999	Tue 10/12/10	650 hrs
University Phone Book 2010 - 2011.Published	999	Fri 9/24/10	515 hrs
Cisco VoIP Upgrade - CLT.Published	999	Mon 9/6/10	375 hrs
North Miami VoIP.Published	999	Wed 9/8/10	375 hrs
Grace Admissions Center.Published	999	Mon 9/13/10	370.2 hrs
Network Switch Refresh 2010-2011.Published	999	Mon 9/6/10	310 hrs
Printers (refresh) 2010-2011.Published	999	Wed 8/11/10	150 hrs
Starbucks & Cafe Commons Renovations.Published	999	Fri 8/6/10	114.03 hrs
Starbucks Providence Library.Published	999	Fri 8/6/10	110 hrs
Advertising Lab.Published	999	Fri 8/6/10	107 hrs
Vision Replacement (or sunset).Published	999	Fri 8/6/10	100 hrs
Great Plains Upgrade for Providence & Sunset in Regionals.Published	999	Fri 8/6/10	90 hrs
School of Ed Renovation	999	Tue 8/3/10	62 hrs
Connectivity for Portable Trailers - MIA.Published	999	Fri 7/30/10	40 hrs
Class Climate Scanner (refresh).Published	999	Thu 7/29/10	30 hrs
Business Continuity.Published	852	Thu 5/26/11	1,755 hrs
Preparedness Report.Published	740	Thu 8/12/10	11.78 hrs
Providence Server Refresh 09-10.Published	718	Thu 8/12/10	12 hrs
Data Center Core Network Upgrade.Published	712	Mon 10/18/10	389 hrs
Security Audit Remediation 2009-2010.Published	698	Fri 8/12/11	2,074 hrs
Backup Verification - UIS.Published	696	Fri 3/4/11	1,038 hrs
Backup Verification.Published	696	Thu 9/16/10	7 hrs
NAC System New Install and Upgrade 2010.Published	674	Thu 11/11/10	329 hrs
Blackboard.Published	665	Fri 11/12/10	318 hrs
Exchange Server Rebuild.Published	664	Fri 10/8/10	96.62 hrs
DegreeWorks v4 Upgrade.Published	660	Wed 10/13/10	118 hrs
Storage Expansion.Published	644	Thu 11/11/10	273 hrs

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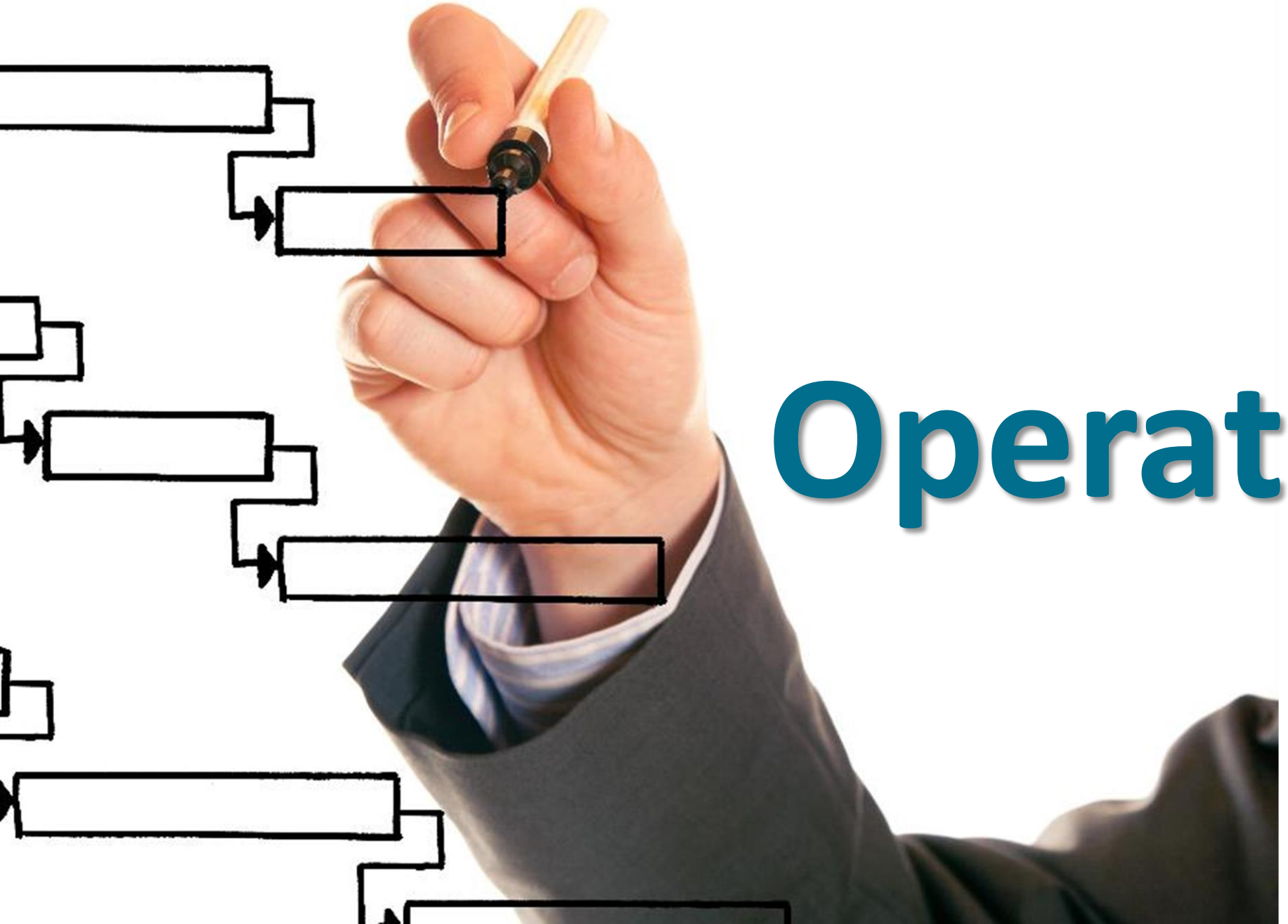

Operational

Operational perspectives

- Time Perspective: 1 week to 12 months
- How do we do this project?
  - Charter
  - Schedule
  - Budget
  - Resource plan
  - Quality plan
  - Delivery plan
  - Marketing plan

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Operational Decisions

- What priority do we give each project?
- How should we allocate the staff?
- What operational work needs to be taken care of?
- What should be sub-contracted?
- What projects need intervention?

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Operational Tools

- Project Schedule
- Project Resource Plan
- Resource Capacity Plan
- Task progress
- Timesheet: plan vs. actual

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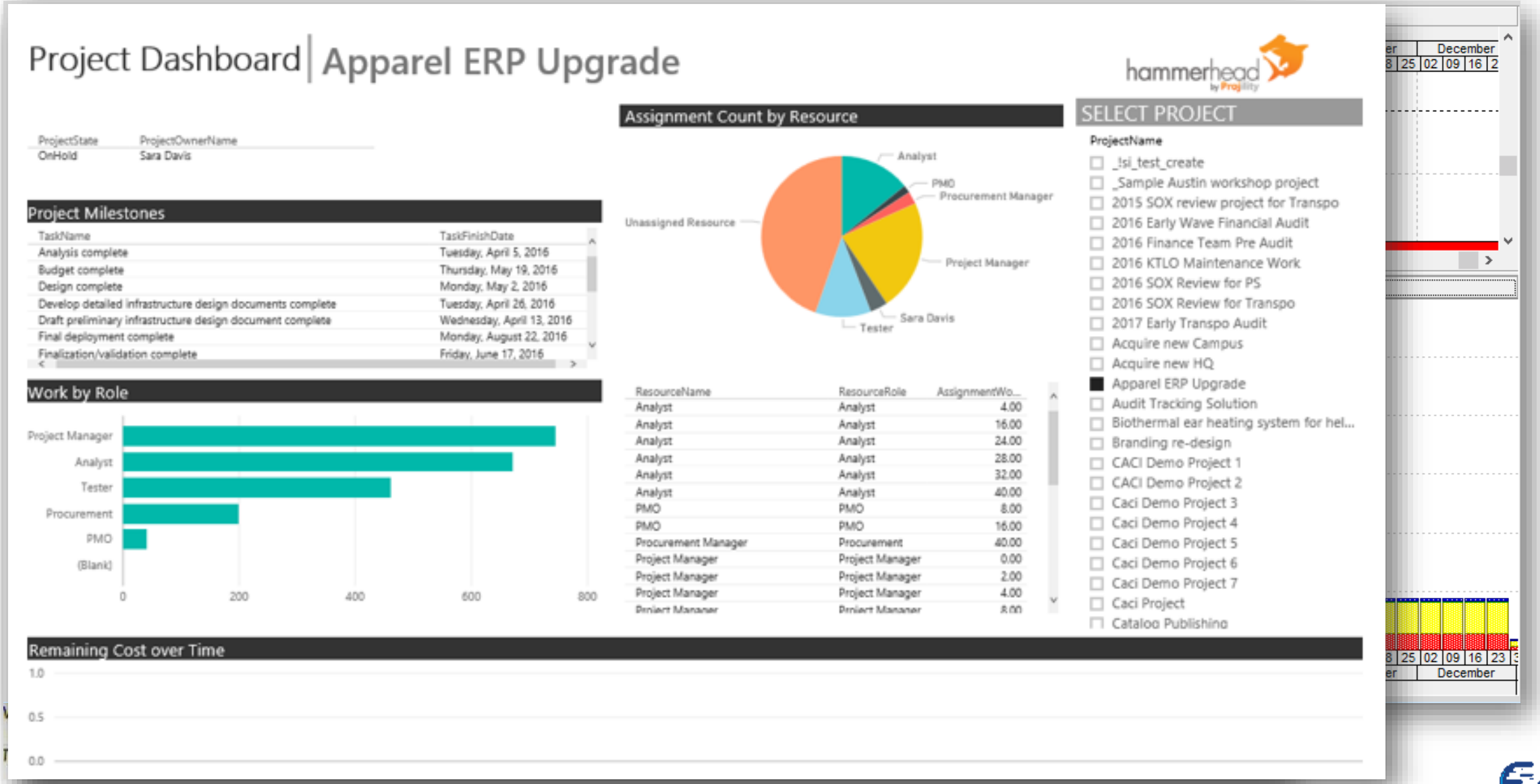
Operational Tools



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Tactical

Tactical perspectives

- Time Perspective: 1 shift to 1 week
- Over the next week, what do you want me to do?
- Over the last day, here's what I did?
- Here are the challenges I'm encountering
- Here's how much time this task took

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Tactical Decisions

- What do I prioritize this week?
- Should I request assistance?

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Tactical Tools

- Agile boards
- Scrum meetings
- Timesheets
- Chat tools

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Tactical Tools

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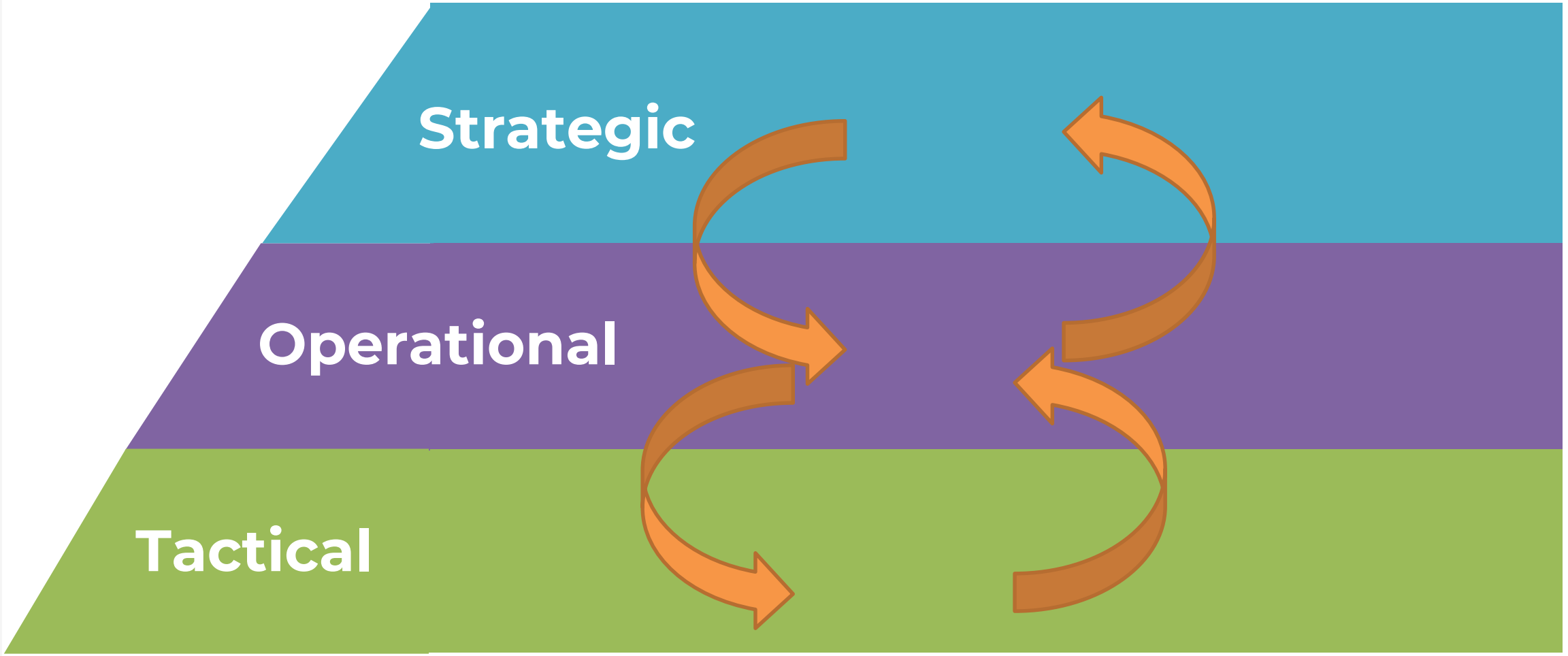
What are the challenges with trying to bring one set of processes to the other levels?

What data actually need to move between levels? And… do we automate or not?



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Bring one level of processes into another?

- Blurring of decision making
- Bringing data that isn't relevant into decisions that aren't enabled by it
- Chain of command for different decisions becomes blurred

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How do we deploy distinct processes and tools and have them work in harmony?

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How to deploy distinct processes but work together

- Make your own swim lanes
- Set up guardrails
- Sometimes it's better to look integrated than be integrated
- Communicate with everyone impacted, not just your level

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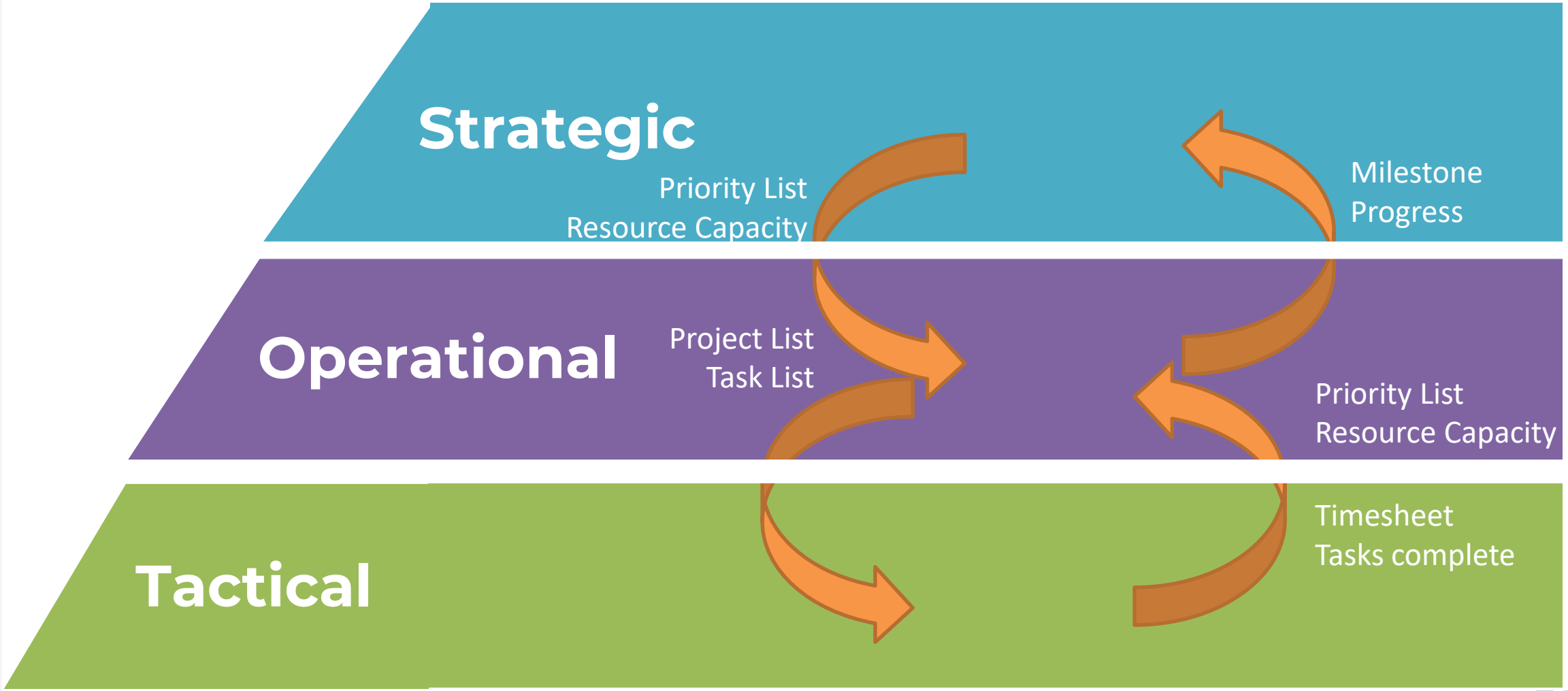
What data actually need to move between levels? And… do we automate or not?



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Beware of sinkholes!

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Caution – pitfalls ahead!

- Be wary of letting the vendor decide
- Don’t bother creating your own vision
- Just work on one level and don’t consider the others
- Decide centrally then push to all levels without consensus

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Tips for keeping these processes distinct as time moves forward

How to keep these processes distinct over time

- Set up multi-level reviews of the process once a year or more
- Build the vision into the hiring and engagement roles of those responsible over time
- Document what you've done and make that document a dynamic updatable tool

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Find your own path

Finding your own path

- Don’t just listen to me
- Take my advice and that of many others
- Build your own design and then find those that can fulfill it
- You don’t need to resolve all levels of your organization in one tool or one solution

EPM Guidance

Contact information

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Thank you

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