

Project Whispering

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What we're talking about

- Why Drupal needs portfolio project management
- Management framework and evolution of needs
- What is program management?
- What is portfolio project management (PPM)?
- How is PPM implemented?
- What tools and strategies are available?
- How does PPM change things?

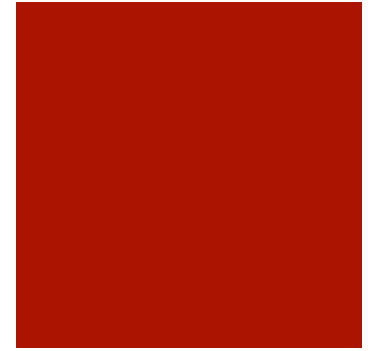
Why Drupal needs portfolio project management



Drupal is all grown up

- Entering the enterprise business and government space
- Increase in the number of projects running concurrently in a given organization

Why Drupal needs portfolio project management



Drupal complexity

- More legacy migrations and multi-platform integrations
- Projects require more highly skilled, niched talent
- Necessary talent is harder to find, more expensive, and more difficult to manage and retain

Goals of this session

- Provide framework to understand progression from project management to PPM
- Provide PPM framework for setting priority and making decisions
- Introduce PPM techniques and tools



Management Framework

Management Framework

Project Portfolio Management



Program Management



Project and Product Management

Description:

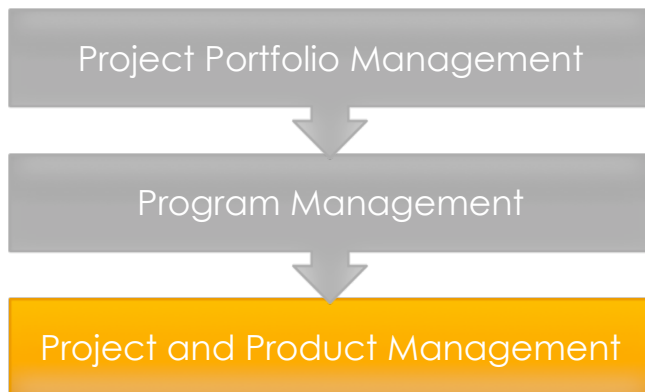


Act of creating plans and managing resources to accomplish a **project**.

A project is a scheduled undertaking for the purpose of creating a product or service.

Management Framework

Project Management



Description:

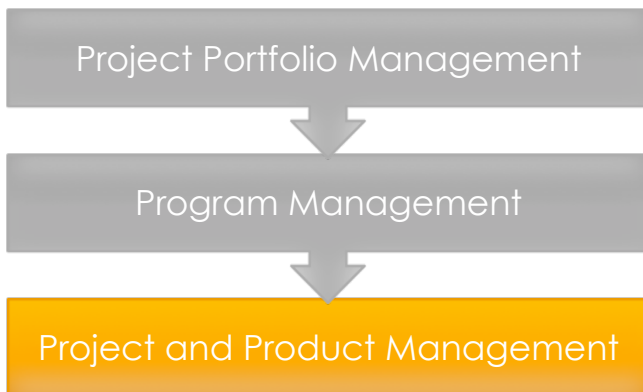


Responsible for the overall success of a **product**. Products may consist of multiple projects.

Product managers remain to manage the product through the its entire lifecycle.

Management Framework

Product Management



Description:

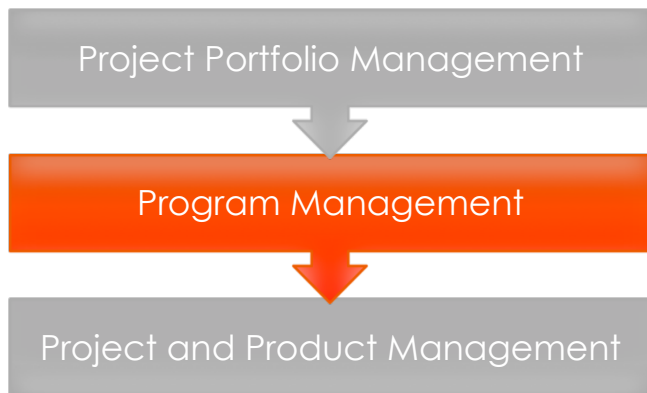


Act of creating and managing multiple projects.

Typically, projects are distinct but related through dependencies.

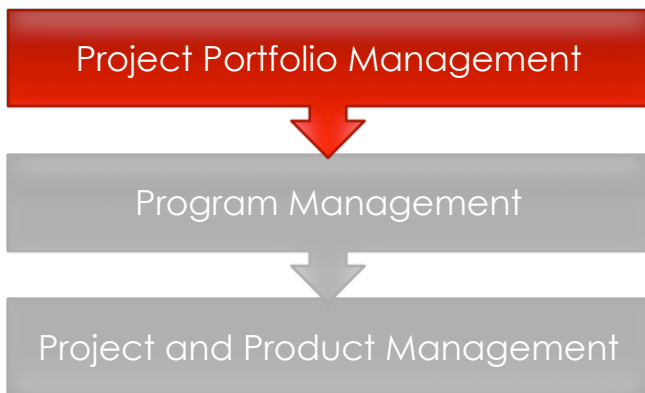
Management
Framework

Program Management



Management
Framework

Project Portfolio Management



Description:



Management process designed to help an organization sort and prioritize projects to align with business objectives.

PPM includes:

- Establishment of project analysis criteria and scoring model
- Project information acquisition and analysis
- Sorting and prioritization of projects on established criteria

Organizational Evolution



Project and Product Management



Program Management

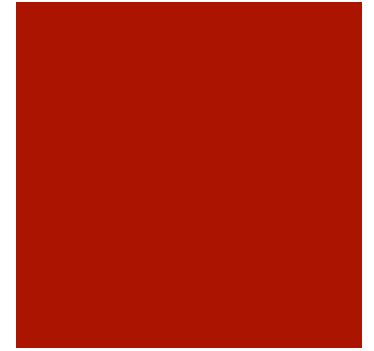


Project Portfolio Management



Program Management

Key Elements of Program Management



- Project Management Office (PMO)
- Dependencies
- Project Templates



Project Management Office (PMO)

Primary goal: achieve benefits from standardizing and following project management policies, processes and methods

- Group or department within an organization
- Defines and maintains standards for project management

Usually based upon one of three models:

- Project repository
- Project coaching
- Enterprise



Project Dependencies

- **Finish to start (FS)** – Project B can't start before A is finished (*i.e. Foundation is dug, then concrete is poured*)
- **Finish to finish (FF)** – Project B can't finish before A is finished (*i.e. Last chapter written before entire book is finished*)
- **Start to start (SS)** – Project B can't start before A starts (*i.e. Project work started before project management activities started*)
- **Start to finish (SF)** – Project B can't finish before A starts (*i.e. New shift starts after previous shift finishes*)

Identifying dependencies is critical to effective resource allocation



Project Templates

- Business Development
 - Contract/Statement of work
- Kickoff Discovery
- Sprint 1 (including multiple milestones)
- Sprint 2 (including multiple milestones)
- Training
- QA
- Launch
- Post Mortem
- Support

Standardize project plans & lifecycles to avoid starting from scratch



Project Portfolio Management (PPM)

Key Elements of PPM

- Business Objectives
- Prioritization of objectives
- Scoring and rating



Business Objectives

Top Criteria Example:

- We want our team to gain D7 experience
- We need more profits
- We want to start doing more business in the educational sector
- We want more repeat business



Scoring and Rating: Approaches

Filtered and unweighted

- Only considers top criteria
- All factor scores weighted equally
- Simplest approach

Comprehensive and weighted

- All project criteria considered
- Top criteria prioritized
- Factor scores weighted by priority
- Most accurate approach

Filtered and unweighted

Potential Project	Profit Potential	Diversification (technology)	Diversification (sector)	Repeat Business	Total Rating
Project A with D7	4	3	2	0	9
Project B at University	2	2	4	2	10
Project C with existing client	4	0	0	4	8
Project D with D7 and University	2	2	4	3	11



Focused on key criteria, all count equally



Weighting Top Criteria

- **Critical (5):** We need more profits
- **Very important (4):** We want our team to gain D7 experience
- **Important (3):** We want more repeat business
- **Nice to have (2):** We want to start doing more business in the educational sector
- Unlisted criteria have no additional weighting

How weighting works

Potential Project	Total Budget	Profit Potential	Diversification (technology)	Diversification (sector)	Prestige (brand)	Repeat Business	Rating
Unweighted factor scores	4	4	3	2	4	0	17
Weight multipliers		x5	x4	x2		x3	
Weighted factor scores	4	20	12	4	4	0	44

Factor score x weight = weighted score

Comprehensive and weighted

Potential Project	Total Budget	Profit Potential	Diversification (technology)	Diversification (sector)	Prestige (brand)	Repeat Business	Unweighted Rating	Weighted Rating
Project A with D7	4	4	3	2	4	0	17	44
Project B at University	2	2	2	4	2	2	14	36
Project C with existing client	3	4	0	0	3	4	14	38
Project D with D7 and University	2	2	2	4	2	3	15	39

Considers all factors, key criteria count for more

Results Comparison

Filtered and unweighted

1. D (score: 11)
2. B (score: 10)
3. A (score: 9)
4. C (score: 8)

Comprehensive and weighted

1. A (score: 44)
2. D (score: 39)
3. C (score: 38)
4. B (score: 36)

Adding and prioritizing criteria can change project appeal





Impact on Sales

Provides quantitative model for strategically selecting projects to seek out, pitch, and accept

- Rank opportunities by score
- Objectively align with business goals
- Identify high-margin opportunities for reselling existing components
- Strategically seek out good matches to portfolio by maximizing average project scores

Tool Selection



Selecting a Solution

- Identify your requirements *first*
- Consider options based on requirements
- Custom build vs. off-the-shelf

Custom build

Pros

- Exactly what you need (in theory)
- Full platform control
- Iteratively create features as needed

Cons

- Expensive
- Time-consuming
- Reinventing the wheel
- Untested

Off-the-shelf

Pros

- Faster
- Proven solution (in theory)
- Can be less expensive
- May have ample documentation
- “Someone to blame”

Cons

- May not meet all your needs
- Feature bloat
- May be tied to expensive service contracts

Off-the-shelf options



Comparison of project management software

From Wikipedia, the free encyclopedia

A comparison of notable project management software.

Software	Collaborative software	Issue tracking system	Scheduling	Project Portfolio Management	Resource Management	Document Management	Workflow system	Reporting and Analyses	Web-based	License
5pm	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	SaaS
24SevenOffice	Yes	No	No	No	No	No	?	?	Yes	Proprietary
AceProject	Yes	No	Yes	Yes	Yes	Yes	No	Yes	Yes	Proprietary and SaaS
Apollo	Yes	No	No	No	Yes	No	?	?	Yes	SaaS
Assembla	Yes	Yes	No	Yes	Yes	Yes	?	?	Yes	SaaS
ATask	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	SaaS
Basecamp	Yes	No	No	No	Yes	Yes	No	No	Yes	SaaS
Binfire	Yes	No	No	Yes	Yes	Yes	No	No	Yes	SaaS
Bontq	Yes	Yes	Yes	Yes	No	Yes	No	No	Yes	SaaS
BrightWork	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Proprietary
CA Clarity PPM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Proprietary and SaaS
Celoxis	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	On-premise and SaaS
Central Desktop	Yes	Yes	No	No	No	Yes	No	No	Yes	Proprietary
Cerebro	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Proprietary
Clarizen	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	SaaS
CMiC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Proprietary and SaaS
codeBeamer	Yes	Yes	No	No	No	Yes	No	No	Yes	Proprietary
Collabive	Yes	No	No	No	No	No	No	No	Yes	Open source
Compuware Changepoint	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Proprietary and SaaS
ConceptDraw Project	No	No	Yes	No	Yes	No	No	No	No	Proprietary
Contactizer	Yes	No	No	No	Yes	No	No	No	No	Proprietary
Copper Project	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Proprietary and SaaS
Deltek Open Plan	Yes	No	Yes	Yes	Yes	No	No	Yes	No	Proprietary
Deltek WelcomHome	Yes	Yes	No	Yes	No	Yes	Yes	Yes	Yes	Proprietary
DeskAway	Yes	Yes	Yes	No	Yes	Yes	No	No	Yes	SaaS
Dolibarr ERP/CRM	Yes	No	No	Yes	Yes	Yes	No	No	Yes	Open source
Doolphy	Yes	No	Yes	Yes	Yes	Yes	No	Yes	Yes	SaaS
dotProject	Yes	Yes	No	No	No	Yes	No	No	Yes	Open source
DynaRoad	No	No	Yes	No	Yes	No	Yes	Yes	No	Proprietary
Endeavour Software Project Management	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Open source
Easy Projects .NET	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Proprietary
eGroupWare	Yes	Yes	No	Yes	Yes	Yes	No	No	Yes	Open source

http://en.wikipedia.org/wiki/Comparison_of_project_management_software





Present Solution Realities

- No present project management application does everything perfectly
 - A buggy centralized solution
 - Decentralized solutions which lack ability to tie together critical information needed for PPM
- Either way, you need people who:
 - Understand the goals
 - Understand the requirements
 - Are trained on the decided approaches



Tool Example

- Resource Management
- Users
- Resource Pools
- Job Roles
- Timesheet and Hour Management
- User Utilization Search
- Schedules

User Utilization

User Utilization Search Fields Custom Data

Edit Worksheet Delete Email

Filter: None View: Resource Grid Group: None

Name	Job Roles	FTE	December 11				January 12				February 12				March 12				
			4	11	18	25	1	8	15	22	29	5	12	19	26	4	11	18	25
Total			1519	1611	1903	1732	1278	1488	1251	1390	1194	1014	1108	1116	889	521	528	265	16
▶ [Redacted]	Business Coordinat	1			40	100	25												
▶ [Redacted]		1																	
▶ [Redacted]	Front-End Develop	1								100	100	100	100	100	60	50	50		
▶ [Redacted]	Front-End Develop	0.9	100	102	101	143	140	123	100	100	100	100	100	100	60	50	50		
▶ [Redacted]	Technical Writer, De	1	190	190	170	130	100	108	100	100	40								
▶ [Redacted]	Front-End Develop	0.6	100	100	100	100	100	100	100	100	100	100	100	100					
▶ [Redacted]	Technical Writer, De	0.9	124	89	64	125	93	90	93	90	78	70	70	70	70	10	10	10	10
▶ [Redacted]	Technical Project Ma	1																	
▶ [Redacted]	Technical Writer, De	0.6	119	110	121	91	91	101	94	76	61	55	55	55	70	60	60	10	10
▶ [Redacted]	Technical Writer, Sy	0.9	103	103	132	100	100	110	106	100	140	100	140	113	100	104	105	60	
▶ [Redacted]		1																	
▶ [Redacted]	SysOps, Developer,	0.9	100	100	120	100	100	100	100	100									
▶ [Redacted]	Technical Project Ma	0.8	80	80	111	120	10	10	10	10	2								
▶ [Redacted]	Developer, QA Engir	0.6	105	90	85	223	142	86	92	91	34	25	25	25	25	25	25	25	25
▶ [Redacted]	Developer	1																	
▶ [Redacted]	Front-End Develop	0.8	80	80	120	180	80	80	140	80	80								

Task Project Issue

20 Results

Rollout of the solution

Daunting challenges

- How long will it take?
- How will you know when you are done?
- Where do you start?

Rollout of the solution

Take a phased approach

- Judiciously select features
- Acclimate users gradually
- Keep processes and tools aligned

Sample Rollout Phasing

1. Enter projects and tasks
2. Time tracking and timesheets
3. Resource management
4. Basic portfolios
5. Business factors information
6. Reporting

Can take 6 months or more to implement a working system!

Break it into steps and take your time



Final thoughts

- Project and portfolio management do not have to be subjective.
- Project and portfolio management have a huge impact on business goals, whether you think about them or not.
- Don't be intimidated. It's not easy, but you can start slow and build in small steps.
- Take your time and start simple.
- You have everything to gain by thinking strategically about your project portfolio.

Thank you

Questions?

