Microsoft Project

Individual and Collaborative Project Management

February 18th 2009

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Business Productivity Specialist
Microsoft
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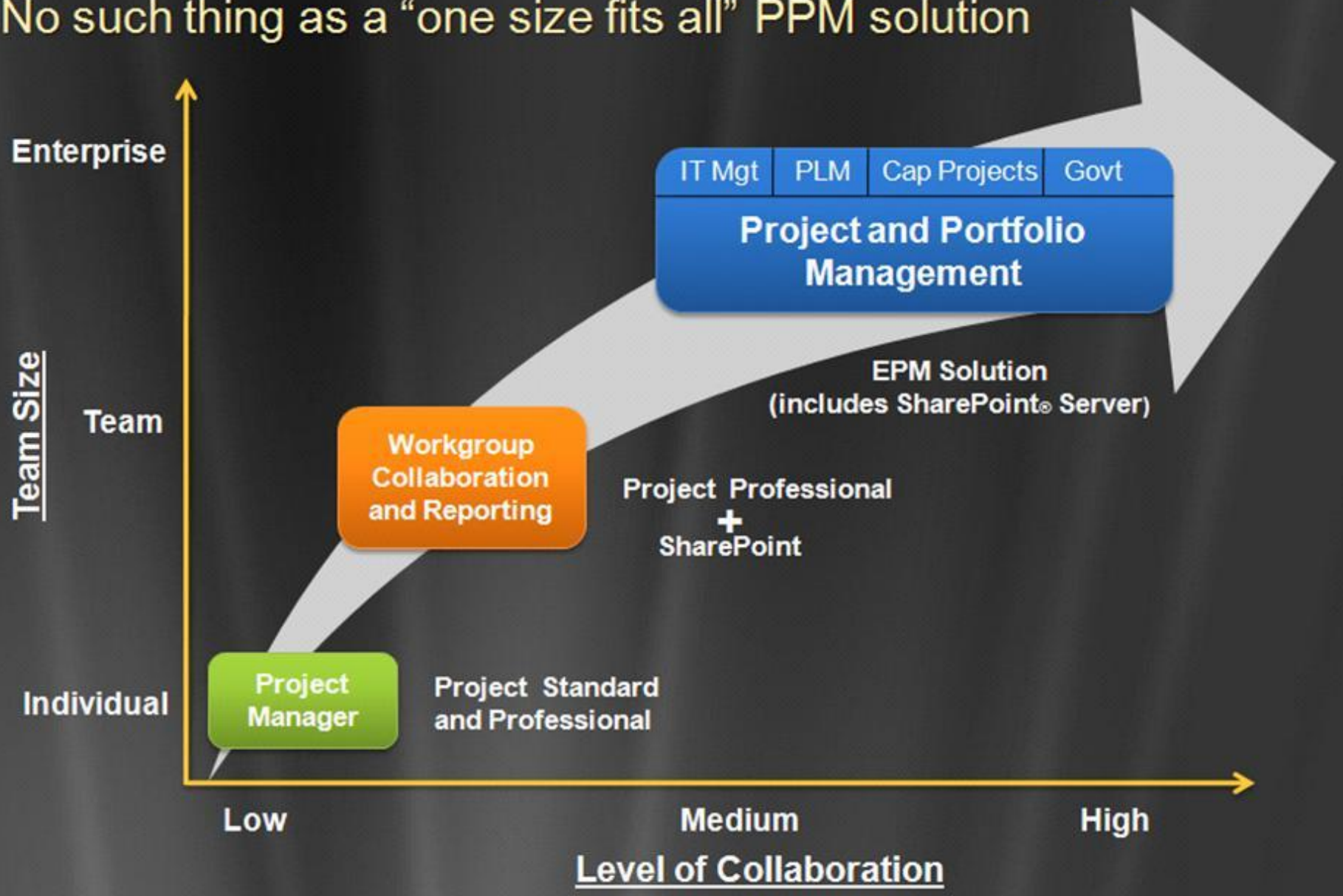
PPM for Individuals, Teams & the Enterprise

No such thing as a "one size fits all" PPM solution



PPM for Individuals, Teams & the Enterprise

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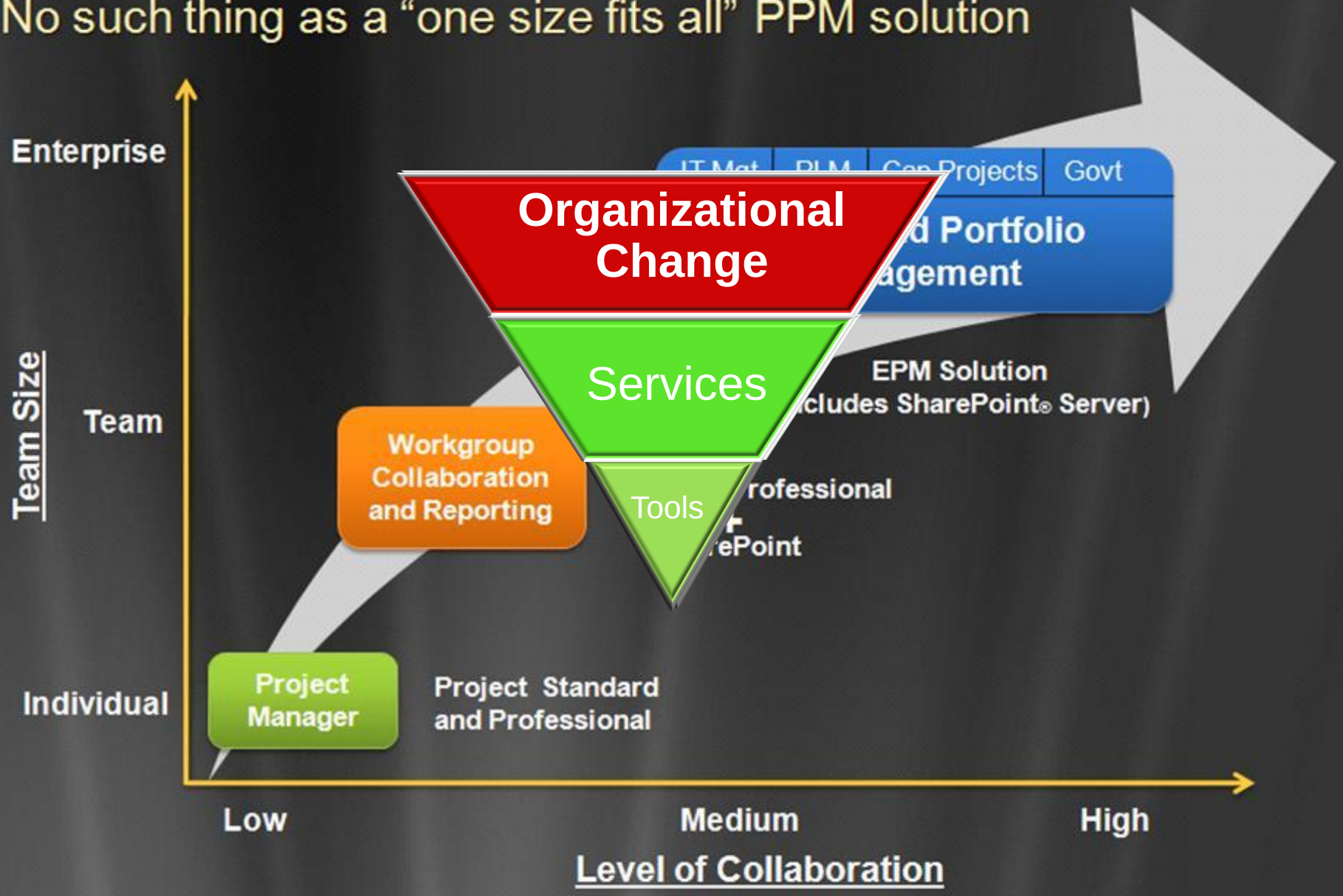
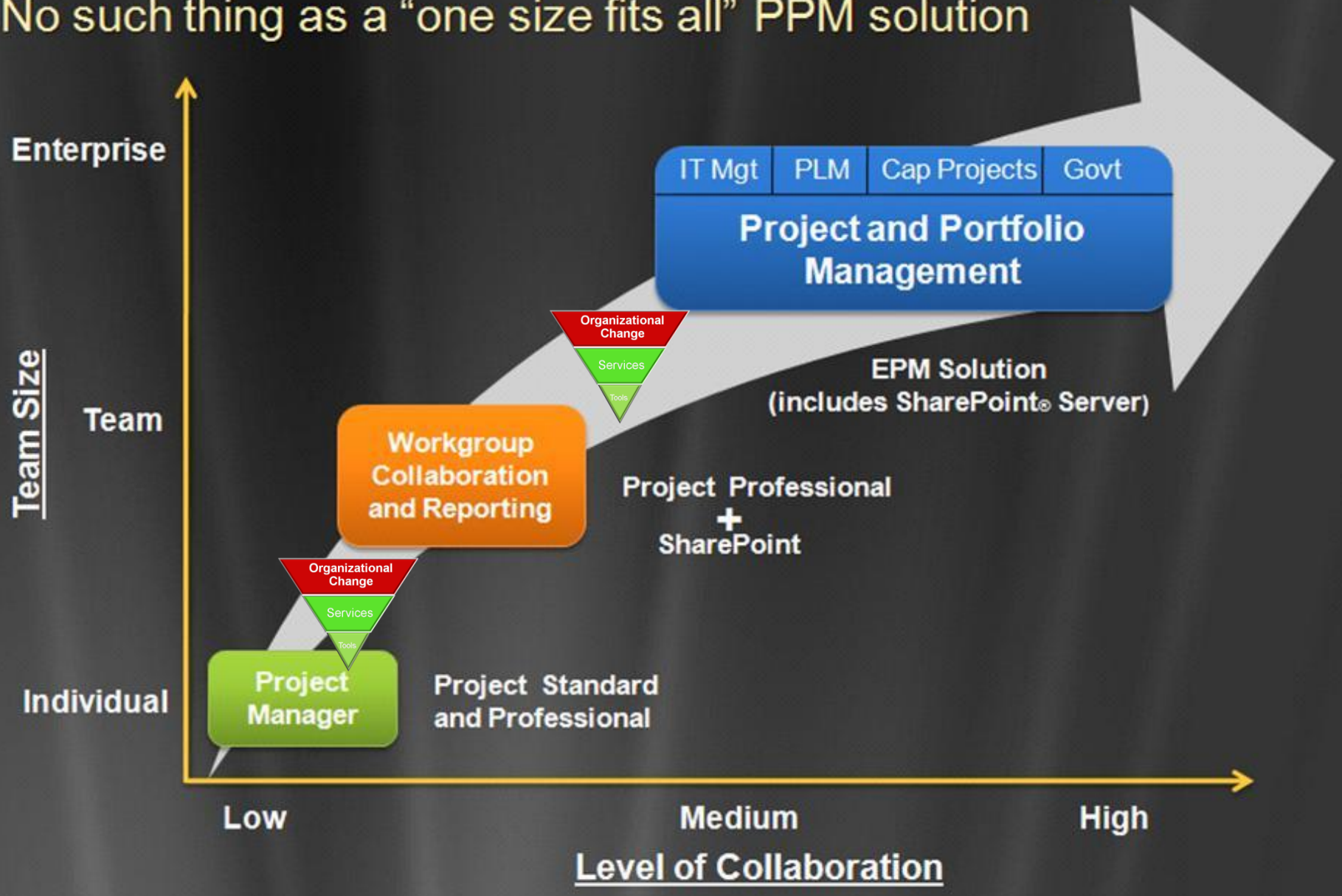


PPM for Individuals, Teams & the Enterprise

No such thing as a "one size fits all" PPM solution



Collaborative PM Goals

- Team/Resource management
- Cost Management
- Schedule Management
- Quality Management

1987

- Scheduling
- Simple reporting
- Task management
- E-mail and print
- Resource tracking

2009

Financial Management

Resource Management

Portfolio Management

Microsoft Office Project
Enterprise Project Management Solution

Reporting

Program Management

Project Collaboration

Enterprise Project Management – Prerequisites

- Organizational Maturity
  - Current Resource Management?
  - Current Communication Management?
- Consistent Executive Sponsorship
  - Budget
  - Motivation

C-PM Requires Process Change

Traditional Project Management Process	Collaborative enterprise Project Management Process
Project proposals are created ad-hoc	Consistent process in place for proposing projects
Project plans are created using many tools (Excel, Word, Project), or not	Project plans are created using a common process, one tool
Project plans are maintained on PC hard drives, network drives	Project Plans are all stored in one place
Project manager uses manual process to notify team members of their tasks	Team members can see all assigned tasks across all projects via the web
Project manager collects status manually and updates schedule	Project team members update their tasks via the web
Results	
No way to see program schedules, KPIs, common milestones	Dashboards, program roll-ups, simple ad-hoc reporting across projects
No way to see resource allocation/availability	Single view of all project resource utilization, forecasting

Early Steps To Collaborative PM

- Process and Tools Training
  - Create Subject Matter Experts
  - Project Certifications
- SharePoint
  - Team Tasks
  - Deliverable Documents
  - Risks, Issues
  - Store Project Plans
  - Share Reports

Case Study – Manufacturing Company

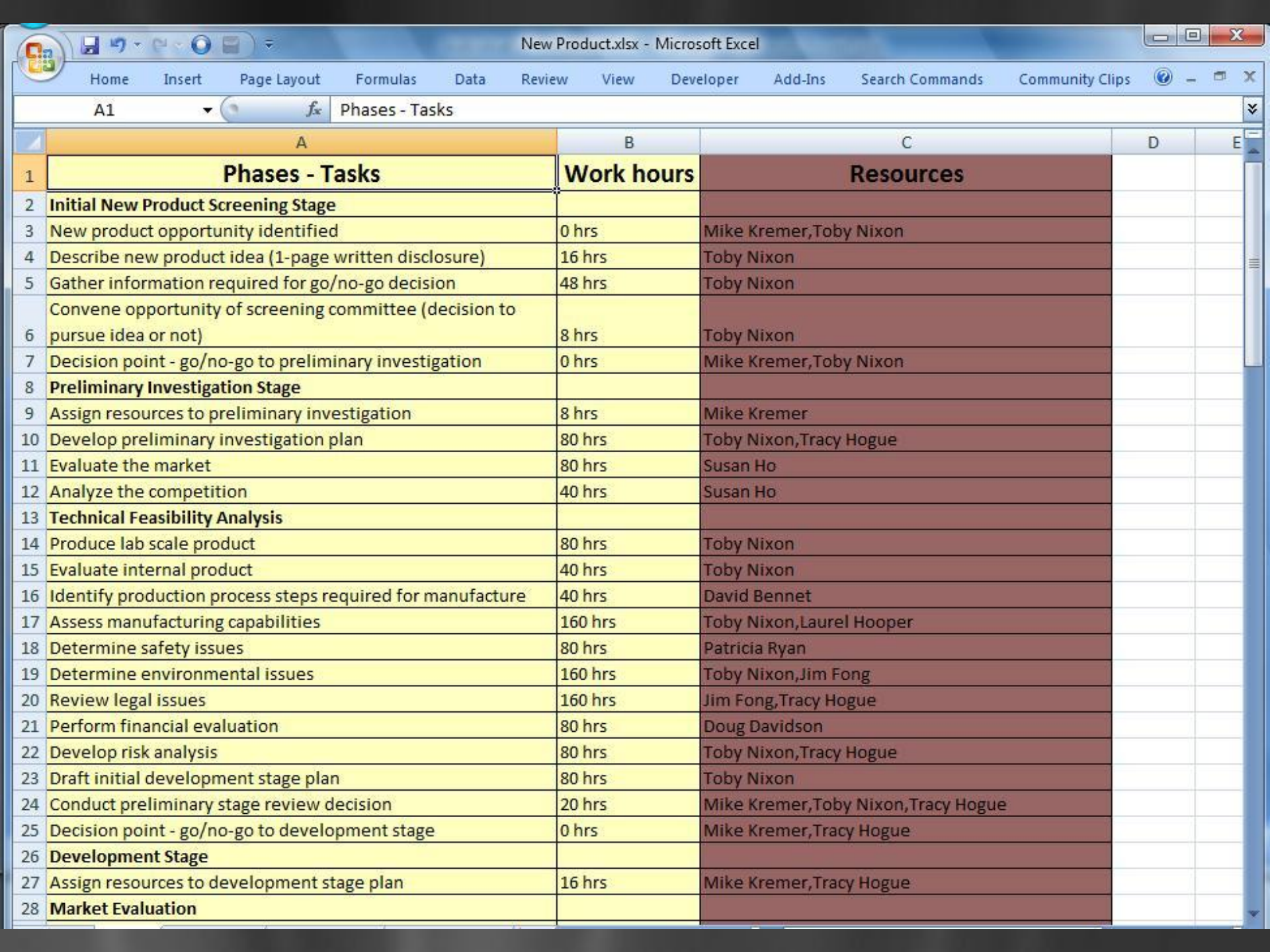
Fabrikam

Fabrikam: A Common Set of Problems

- Homemade Tool in Place
- Multiple International Sites, Methodology Variations
- Needs:
  - Resource and Portfolio Planning
  - Task Tracking
  - Reporting
- Business Must Approve Case for Funding EPM

- Detailed RFP Created
- Presentation to Decision Makers

- Outcome – Microsoft Chosen, Project Not Funded



	A	B	C
1	**Phases - Tasks**	**Work hours**	**Resources**
2	**Initial New Product Screening Stage**		
3	New product opportunity identified	0 hrs	Mike Kremer,Toby Nixon
4	Describe new product idea (1-page written disclosure)	16 hrs	Toby Nixon
5	Gather information required for go/no-go decision	48 hrs	Toby Nixon
6	Convene opportunity of screening committee (decision to pursue idea or not)	8 hrs	Toby Nixon
7	Decision point - go/no-go to preliminary investigation	0 hrs	Mike Kremer,Toby Nixon
8	**Preliminary Investigation Stage**		
9	Assign resources to preliminary investigation	8 hrs	Mike Kremer
10	Develop preliminary investigation plan	80 hrs	Toby Nixon,Tracy Hogue
11	Evaluate the market	80 hrs	Susan Ho
12	Analyze the competition	40 hrs	Susan Ho
13	**Technical Feasibility Analysis**		
14	Produce lab scale product	80 hrs	Toby Nixon
15	Evaluate internal product	40 hrs	Toby Nixon
16	Identify production process steps required for manufacture	40 hrs	David Bennet
17	Assess manufacturing capabilities	160 hrs	Toby Nixon,Laurel Hooper
18	Determine safety issues	80 hrs	Patricia Ryan
19	Determine environmental issues	160 hrs	Toby Nixon,Jim Fong
20	Review legal issues	160 hrs	Jim Fong,Tracy Hogue
21	Perform financial evaluation	80 hrs	Doug Davidson
22	Develop risk analysis	80 hrs	Toby Nixon,Tracy Hogue
23	Draft initial development stage plan	80 hrs	Toby Nixon
24	Conduct preliminary stage review decision	20 hrs	Mike Kremer,Toby Nixon,Tracy Hogue
25	Decision point - go/no-go to development stage	0 hrs	Mike Kremer,Tracy Hogue
26	**Development Stage**		
27	Assign resources to development stage plan	16 hrs	Mike Kremer,Tracy Hogue
28	**Market Evaluation**		

Microsoft Project - New Product

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New Resource From

Show all items | Show data and differences columns

104 hrs

Gantt Chart

	Task Name	Duration	Start	Finish	Work
1	**Initial New Product Screening Stage**	**6 days**	**Mon 2/16/09**	**Mon 2/23/09**	**104 hrs**
2	New product opportunity identified	1 day	Mon 2/16/09	Mon 2/16/09	16 hrs
3	Describe new product idea (1-page written d	2 days	Mon 2/16/09	Tue 2/17/09	16 hrs
4	Gather information required for go/no-go deci	6 days	Mon 2/16/09	Mon 2/23/09	48 hrs
5	Convene opportunity of screening committee	1 day	Mon 2/16/09	Mon 2/16/09	8 hrs
6	Decision point - go/no-go to preliminary invest	1 day	Mon 2/16/09	Mon 2/16/09	16 hrs
7	**Preliminary Investigation Stage**	**10 days**	**Mon 2/16/09**	**Fri 2/27/09**	**1,204 hrs**
8	Assign resources to preliminary investigation	1 day	Mon 2/16/09	Mon 2/16/09	8 hrs
9	Develop preliminary investigation plan	5 days	Mon 2/16/09	Fri 2/20/09	80 hrs
10	Evaluate the market	10 days	Mon 2/16/09	Fri 2/27/09	80 hrs
11	Analyze the competition	5 days	Mon 2/16/09	Fri 2/20/09	40 hrs
12	**Technical Feasibility Analysis**	**10 days**	**Mon 2/16/09**	**Fri 2/27/09**	**160 hrs**
13	Produce lab scale product	10 days	Mon 2/16/09	Fri 2/27/09	80 hrs
14	Evaluate internal product	5 days	Mon 2/16/09	Fri 2/20/09	40 hrs
15	Identify production process steps require	5 days	Mon 2/16/09	Fri 2/20/09	40 hrs
16	Assess manufacturing capabilities	10 days	Mon 2/16/09	Fri 2/27/09	160 hrs
17	Determine safety issues	10 days	Mon 2/16/09	Fri 2/27/09	80 hrs
18	Determine environmental issues	10 days	Mon 2/16/09	Fri 2/27/09	160 hrs
19	Review legal issues	10 days	Mon 2/16/09	Fri 2/27/09	160 hrs
20	Perform financial evaluation	10 days	Mon 2/16/09	Fri 2/27/09	80 hrs
21	Develop risk analysis	5 days	Mon 2/16/09	Fri 2/20/09	80 hrs
22	Draft initial development stage plan	10 days	Mon 2/16/09	Fri 2/27/09	80 hrs
23	Conduct preliminary stage review decision	0.83 days	Mon 2/16/09	Mon 2/16/09	20 hrs
24	Decision point - go/no-go to development stag	1 day	Mon 2/16/09	Mon 2/16/09	16 hrs
25	**Development Stage**	**92 days**	**Mon 2/16/09**	**Tue 6/23/09**	**4,628 hrs**
26	Assign resources to development stage plan	1 day	Mon 2/16/09	Mon 2/16/09	16 hrs
27	**Market Evaluation**	**15 days**	**Mon 2/16/09**	**Fri 3/6/09**	**480 hrs**

'09 | Feb 15, '09 | Feb 22, '09 | Mar 1, '09

T W T F S S M T W T F S S M T W T F S S M T W T F

Mike Kremer,Toby Nixon
Toby Nixon
Toby Nixon
Toby Nixon
Mike Kremer,Toby Nixon
Mike Kremer
Toby Nixon,Mary North
Kim Ralls
Kim Ralls
Toby Nixon
Toby Nixon
Tod Rowe
Toby Nixon,Susan B
Ann Beebe
Toby Nixon,Jon Mor
Jon Morris,Mary No
Stu Osborn
Toby Nixon,Mary North
Toby Nixon
Mike Kremer,Toby Nixon,Mary North
Mike Kremer,Mary North
Mike Kremer,Mary North

Ready

Microsoft Project - New Product + six months.mpp

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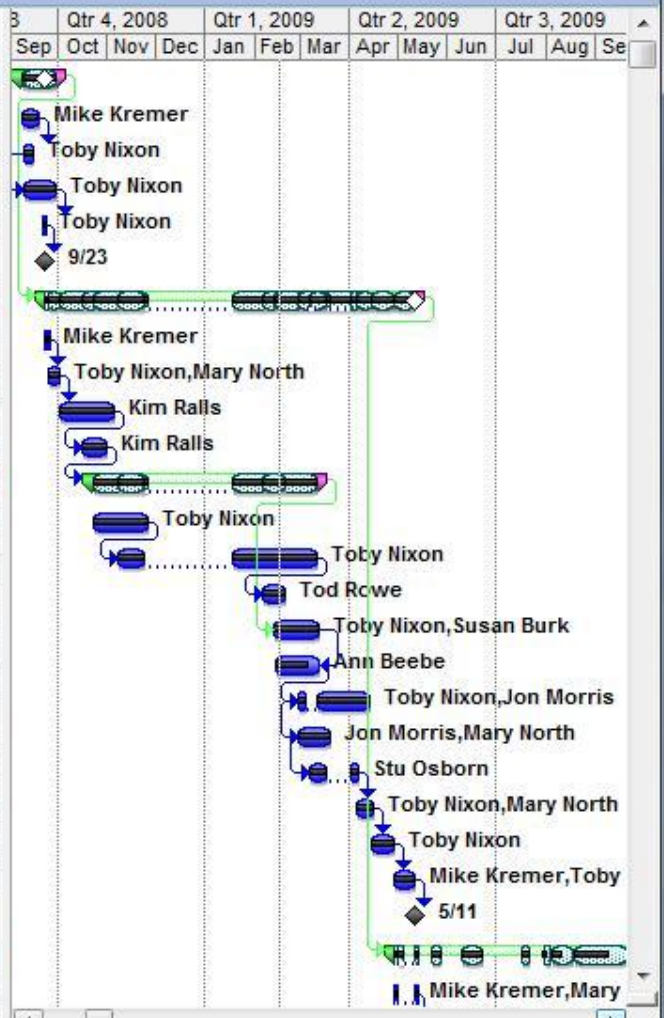
Type a question for help

Show all items | Show data and differences columns

Gather information required for go/no-go decision

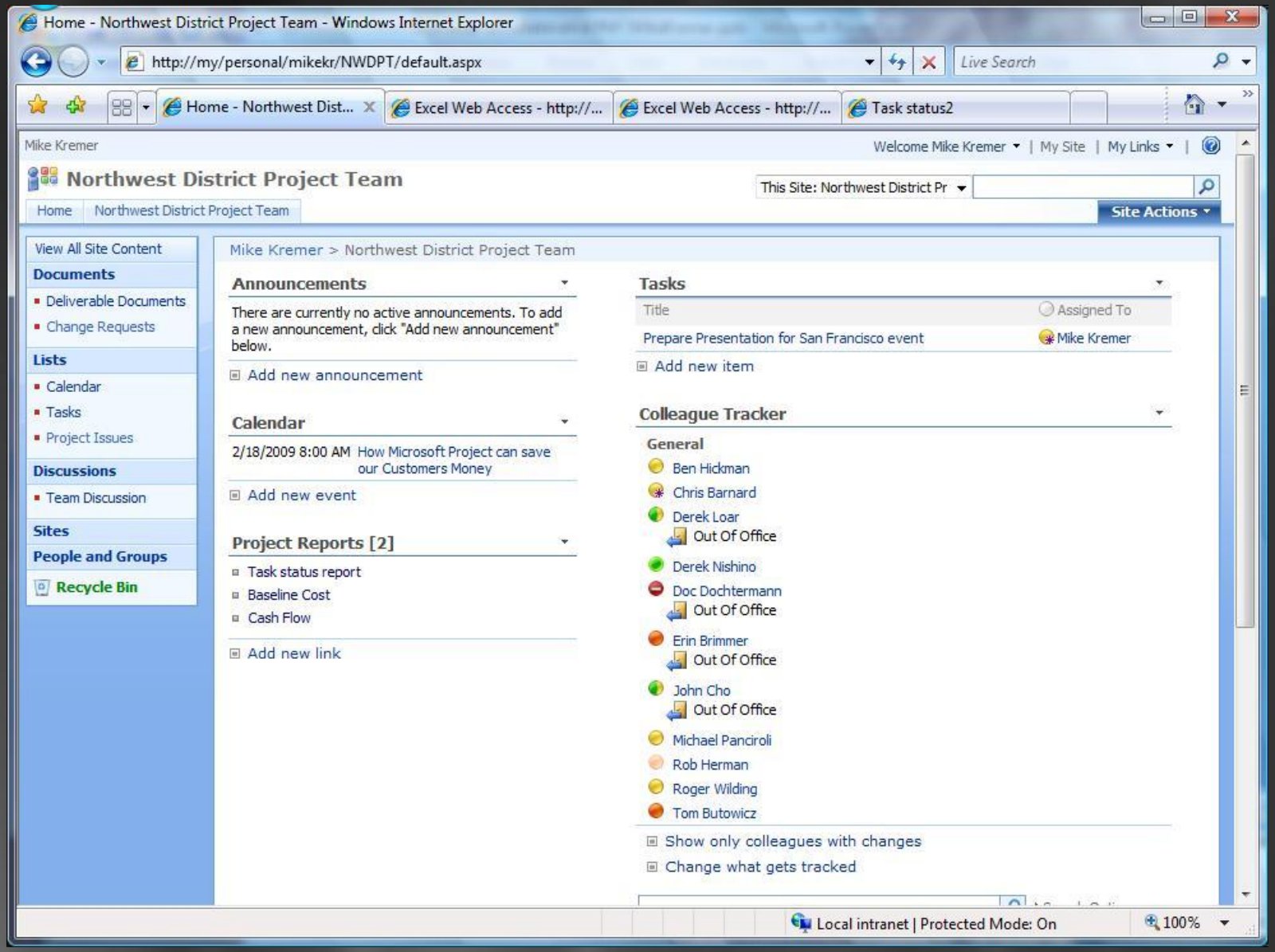
Gantt Chart

		Task Name	Duration	Start
1		Screening	16 days	Mon 9/8/08
2		New product opportunity identified	9.75 days	Mon 9/8/08
3	✓	Describe new product idea (1-page written disclosure)	4.88 days	Tue 9/9/08
4	✓	Gather information required for go/no-go decision	15 days	Tue 9/9/08
5	✓	Convene opportunity of screening committee (decision to pursue idea o	1.13 days	Mon 9/22/08
6		*Decision point - go/no-go to preliminary investigation*	*0 days*	*Tue 9/23/08*
7		Investigation	163.71 days	Tue 9/23/08
8	✓	Assign resources to preliminary investigation	2 days	Tue 9/23/08
9	✓	Develop preliminary investigation plan	5.63 days	Wed 9/24/08
10	✓	Evaluate the market	25 days	Wed 10/1/08
11	✓	Analyze the competition	11.25 days	Wed 10/15/08
12	✓	Tech Feasibility	99.38 days	Wed 10/22/08
13	✓	Produce lab scale product	25 days	Wed 10/22/08
14	✓	Evaluate internal product	50 days	Thu 11/6/08
15	✓	Identify production process steps required for manufacture	11.25 days	Wed 2/4/09
16	✓	Assess manufacturing capabilities	21.25 days	Wed 2/11/09
17		Determine safety issues	20.19 days	Thu 2/12/09
18	✓	Determine environmental issues	27.5 days	Thu 2/26/09
19	✓	Review legal issues	14.38 days	Thu 2/26/09
20	✓	Perform financial evaluation	11.25 days	Thu 3/5/09
21	✓	Develop risk analysis	7.5 days	Fri 4/3/09
22	✓	Draft initial development stage plan	10.75 days	Mon 4/13/09
23	✓	Conduct preliminary stage review decision	9.58 days	Mon 4/27/09
24		*Decision point - go/no-go to development stage*	*0 days*	*Mon 5/11/09*
25		Development	405.13 days	Tue 4/28/09
26	✓	Assign resources to development stage plan	1 day	Tue 4/28/09

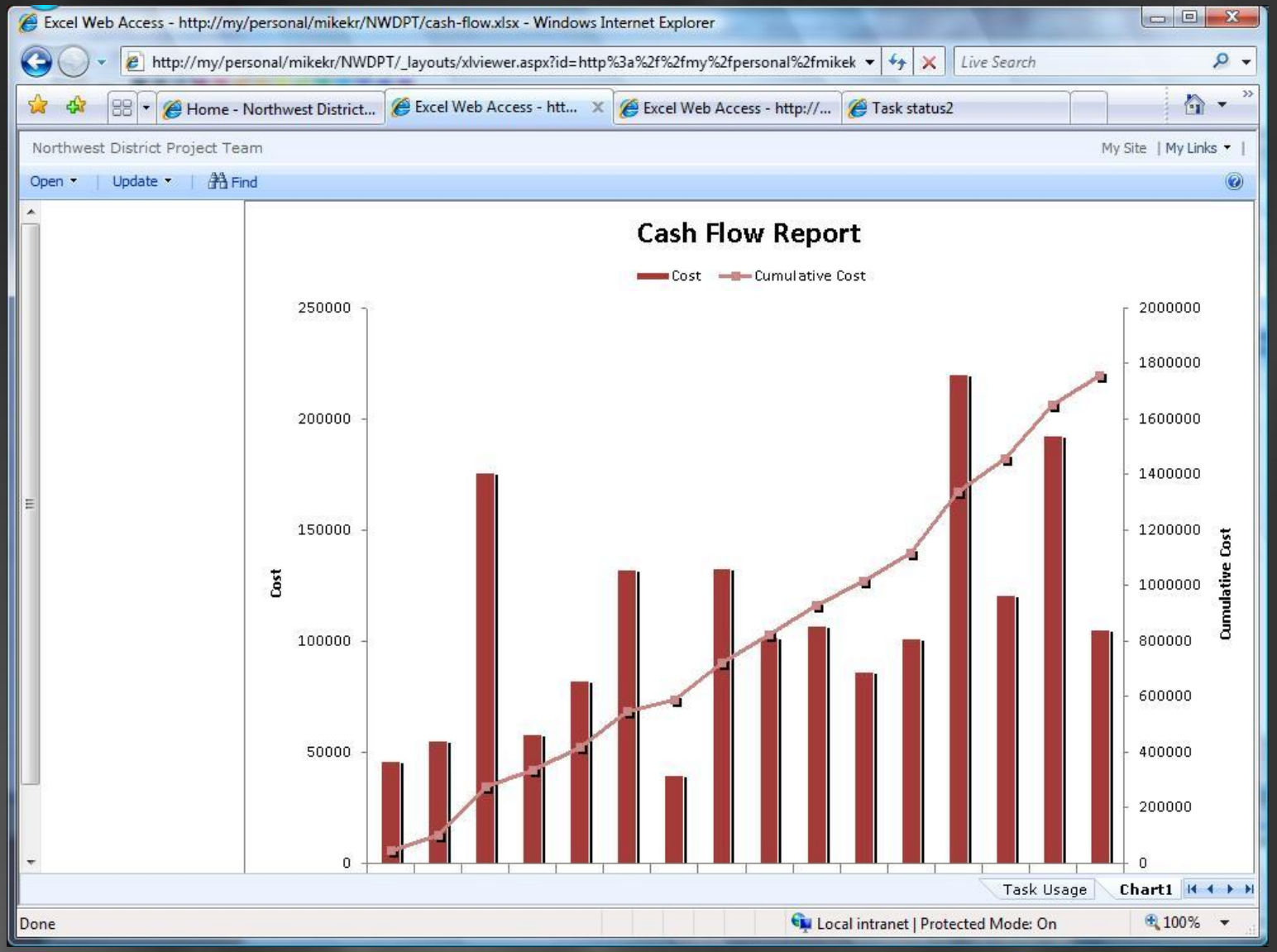


Ready

Team Project Site on SharePoint



Team Project Site on SharePoint



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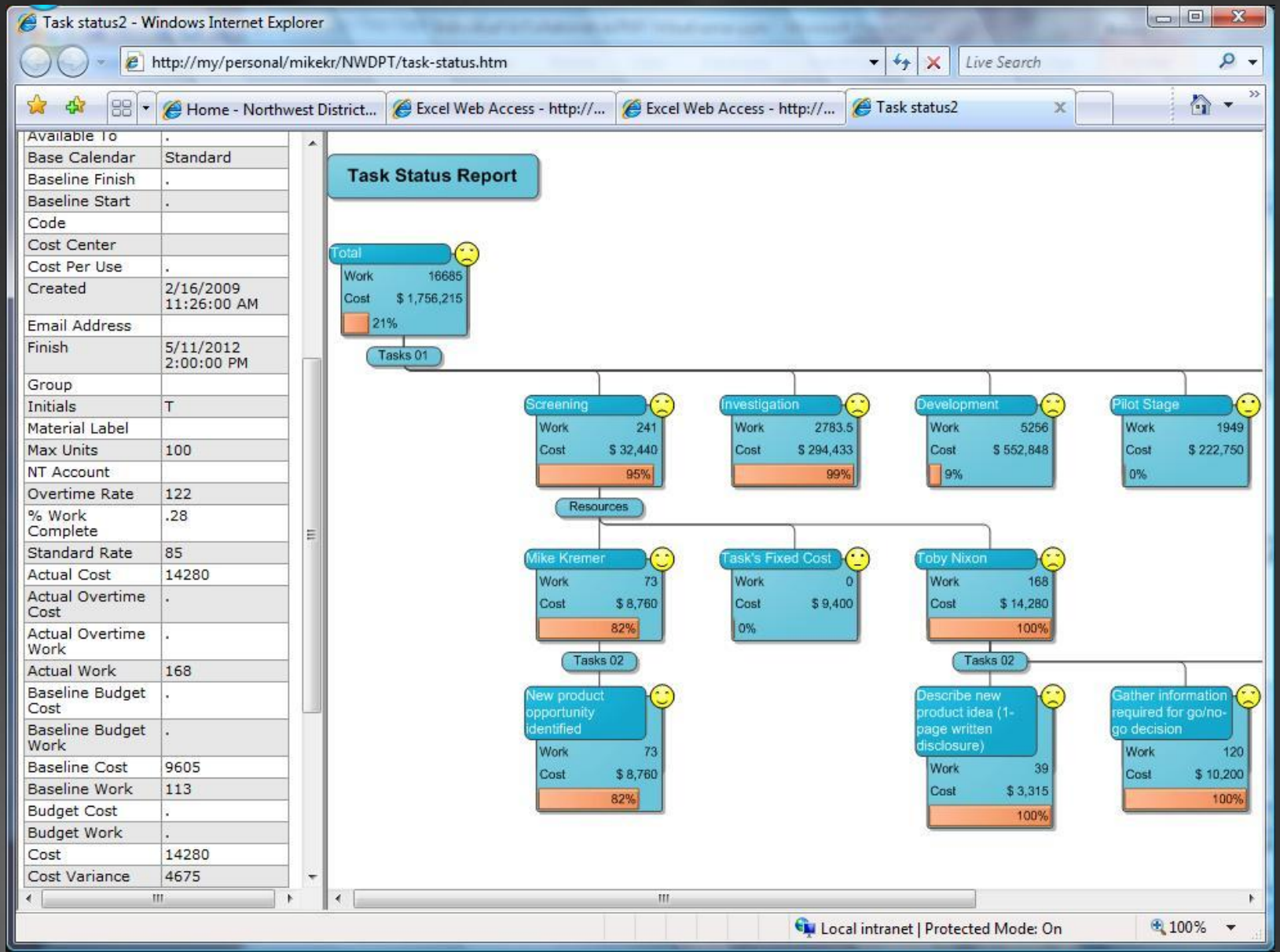

Available To	.
Base Calendar	Standard
Baseline Finish	.
Baseline Start	.
Code	
Cost Center	
Cost Per Use	.
Created	2/16/2009 11:26:00 AM
Email Address	
Finish	5/11/2012 2:00:00 PM
Group	
Initials	T
Material Label	
Max Units	100
NT Account	
Overtime Rate	122
% Work Complete	.28
Standard Rate	85
Actual Cost	14280
Actual Overtime Cost	.
Actual Overtime Work	.
Actual Work	168
Baseline Budget Cost	.
Baseline Budget Work	.
Baseline Cost	9605
Baseline Work	113
Budget Cost	.
Budget Work	.
Cost	14280
Cost Variance	4675

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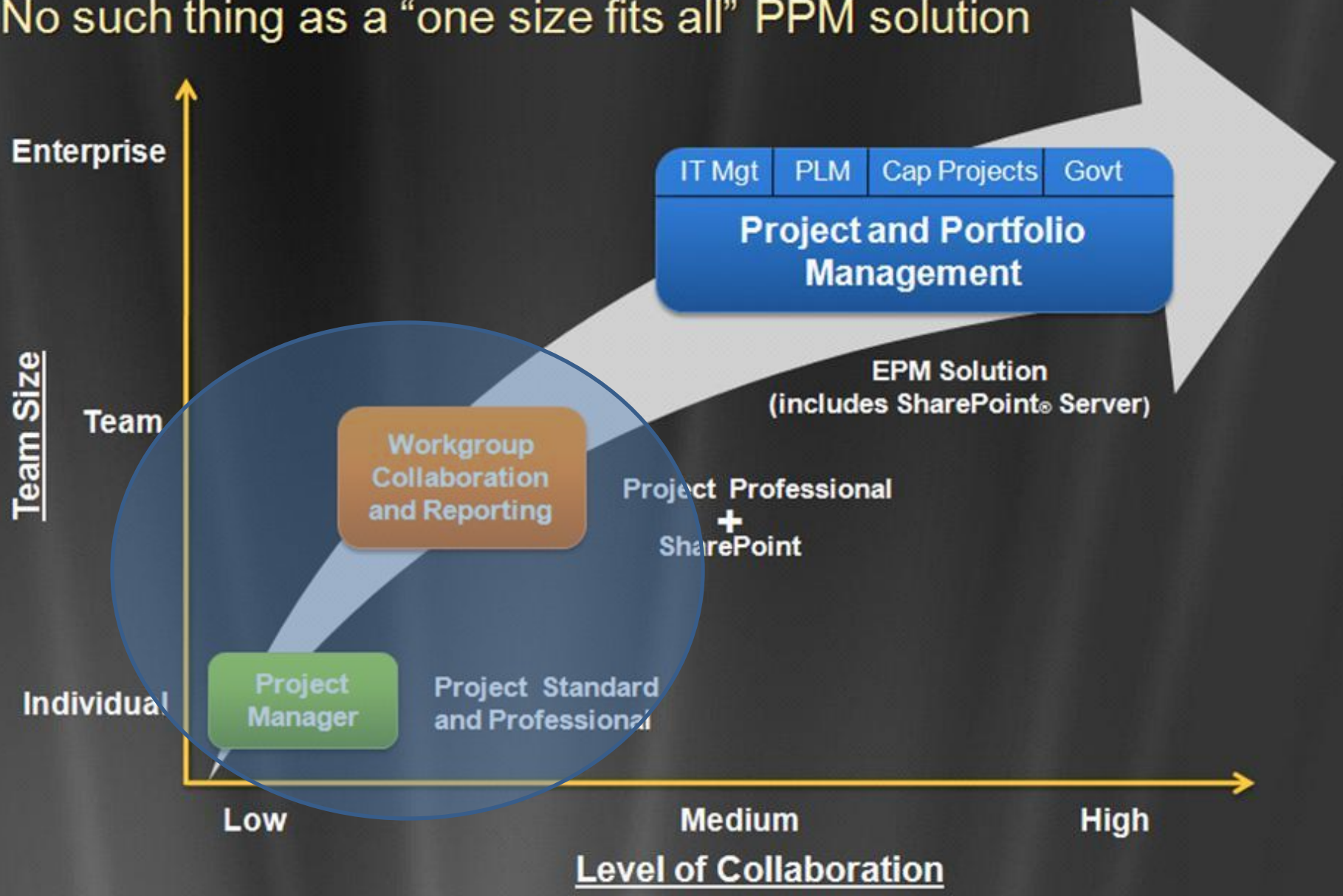

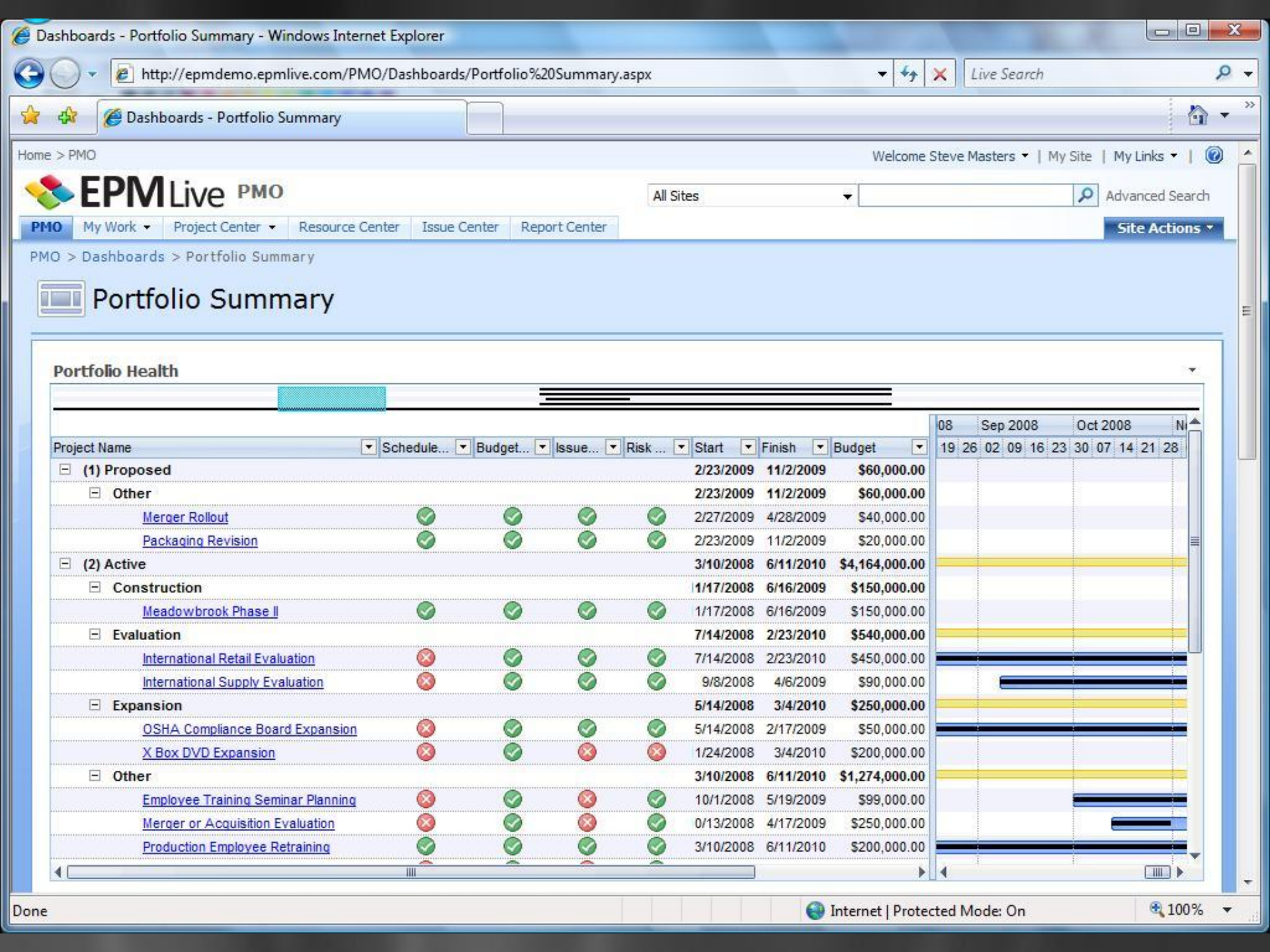
Dashboards - Portfolio Summary - Windows Internet Explorer
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Live Search
Dashboards - Portfolio Summary
Home > PMO
Welcome Steve Masters | My Site | My Links
EPM Live PMO
All Sites
Advanced Search
PMO
My Work
Project Center
Resource Center
Issue Center
Report Center
Site Actions
PMO > Dashboards > Portfolio Summary
Portfolio Summary
Portfolio Health
Project Name
Schedule...
Budget...
Issue...
Risk ...
Start
Finish
Budget
08
Sep 2008
Oct 2008
19 26 02 09 16 23 30 07 14 21 28
(1) Proposed 2/23/2009 11/2/2009 $60,000.00
Other 2/23/2009 11/2/2009 $60,000.00
Merger Rollout 2/27/2009 4/28/2009 $40,000.00
Packaging Revision 2/23/2009 11/2/2009 $20,000.00
(2) Active 3/10/2008 6/11/2010 $4,164,000.00
Construction 1/17/2008 6/16/2009 $150,000.00
Meadowbrook Phase II 1/17/2008 6/16/2009 $150,000.00
Evaluation 7/14/2008 2/23/2010 $540,000.00
International Retail Evaluation 7/14/2008 2/23/2010 $450,000.00
International Supply Evaluation 9/8/2008 4/6/2009 $90,000.00
Expansion 5/14/2008 3/4/2010 $250,000.00
OSHA Compliance Board Expansion 5/14/2008 2/17/2009 $50,000.00
X Box DVD Expansion 1/24/2008 3/4/2010 $200,000.00
Other 3/10/2008 6/11/2010 $1,274,000.00
Employee Training Seminar Planning 10/1/2008 5/19/2009 $99,000.00
Merger or Acquisition Evaluation 0/13/2008 4/17/2009 $250,000.00
Production Employee Retraining 3/10/2008 6/11/2010 $200,000.00
Done
Internet | Protected Mode: On
100%

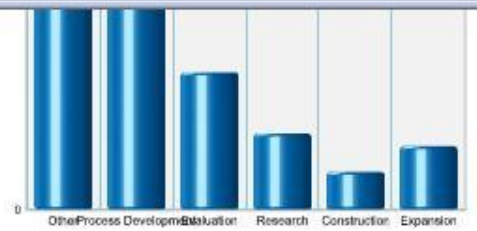
Dashboards - Portfolio Summary - Windows Internet Explorer

http://epmdemo.epmlive.com/PMO/Dashboards/Portfolio%20Summary.aspx

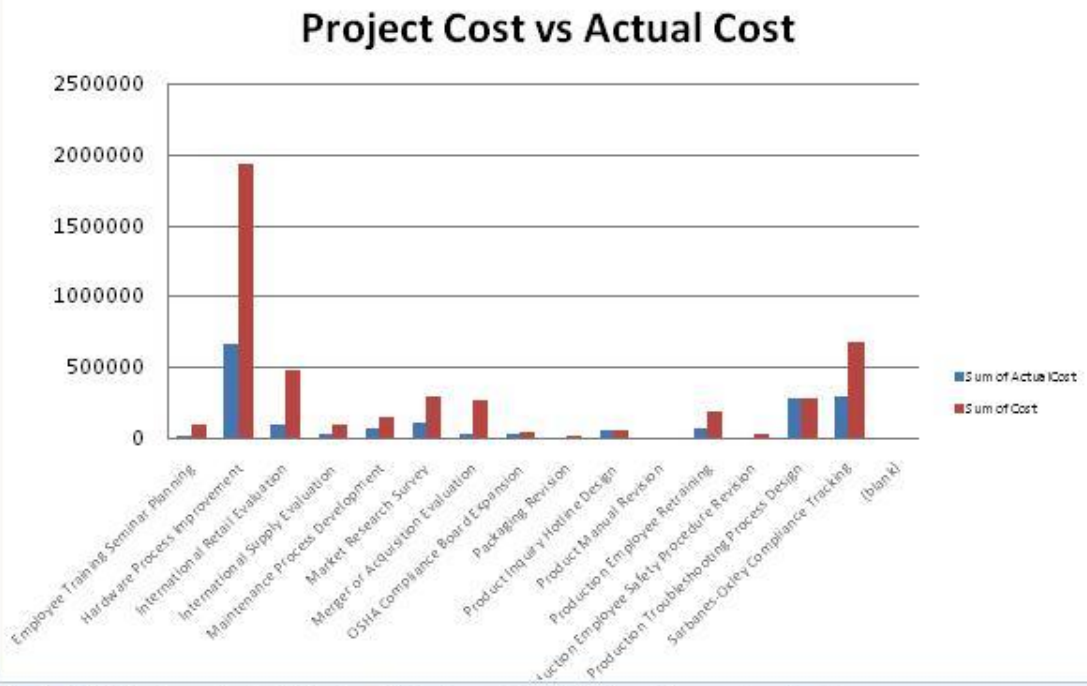
Live Search

Dashboards - Portfolio Summary

Production Employee Safet			**10/31/2008**		
Need to find the latest Safet		Caron Rob	10/31/2008	Steve Masters	(2) Normal
Sarbanes-Oxley Complianc			**1/22/2009**		
Need to hire a SOX consulta		Muller Patrik	11/21/2008	Bowen Eli	(1) High
Need to revisit Manufacturin		Francis Cat	1/22/2009	Hamlin Jay	(2) Normal
X Box DVD Expansion			**2/12/2009**		
Parts on Back Order		Steve Masters	2/12/2009	Scott Bishop	(1) High



Data Analysis



Cost vs Actual Cost | Work vs Actual Work | Issue Count

Done

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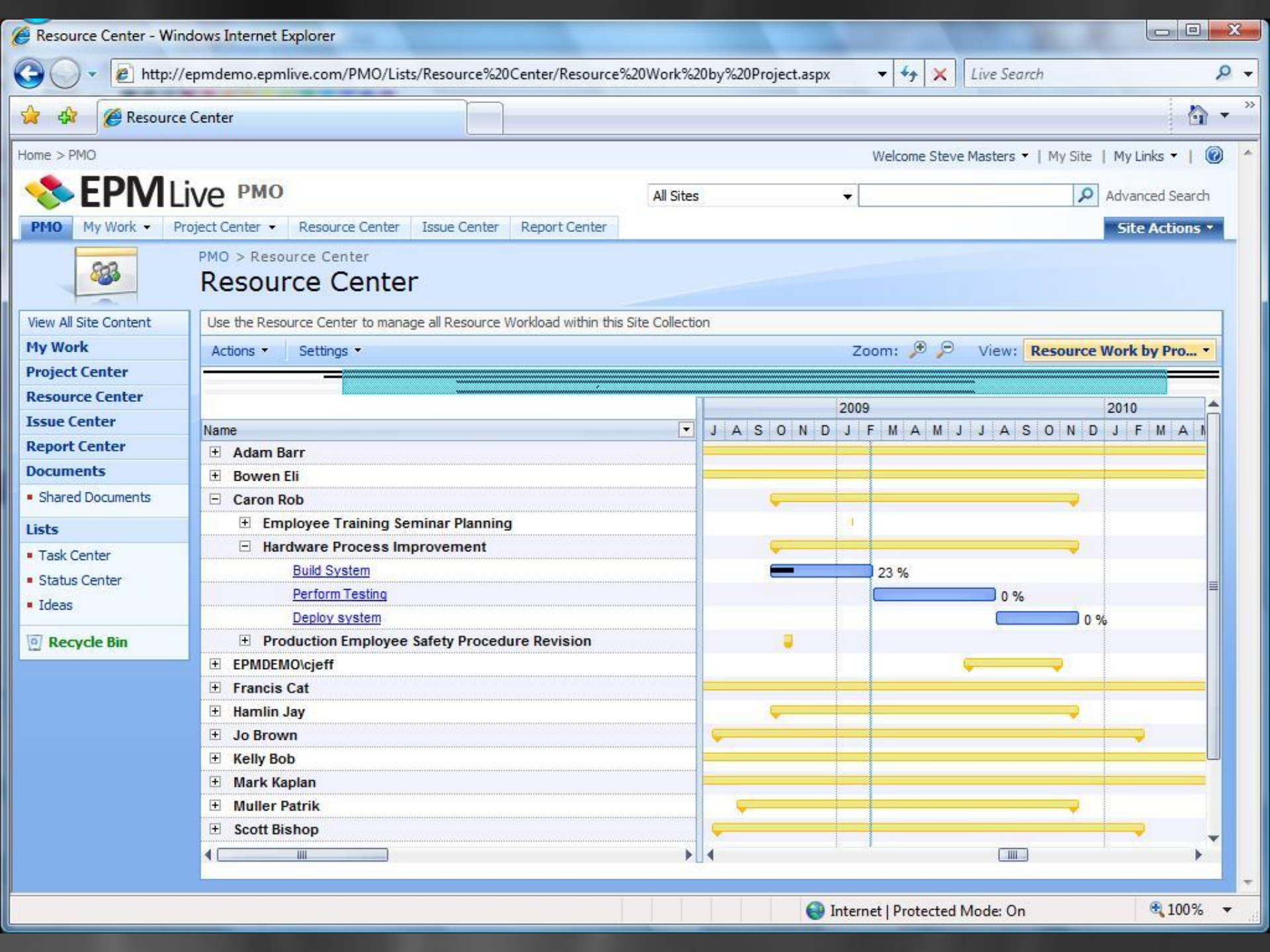
Resource Center - Windows Internet Explorer
http://epmdemo.epmlive.com/PMO/Lists/Resource%20Center/Resource%20Work%20by%20Project.aspx
Live Search
Resource Center
Home > PMO
Welcome Steve Masters | My Site | My Links
EPM Live PMO
All Sites
Advanced Search
PMO
My Work
Project Center
Resource Center
Issue Center
Report Center
Site Actions
PMO > Resource Center
Resource Center
View All Site Content
My Work
Project Center
Resource Center
Issue Center
Report Center
Documents
Shared Documents
Lists
Task Center
Status Center
Ideas
Recycle Bin
Use the Resource Center to manage all Resource Workload within this Site Collection
Actions
Settings
Zoom:
View:
Resource Work by Pro...
Name
2009
2010
J A S O N D J F M A M J J A S O N D J F M A M
Adam Barr
Bowen Eli
Caron Rob
Employee Training Seminar Planning
Hardware Process Improvement
Build System
Perform Testing
Deploy system
23 %
0 %
0 %
Production Employee Safety Procedure Revision
EPMDEMO\cjeff
Francis Cat
Hamlin Jay
Jo Brown
Kelly Bob
Mark Kaplan
Muller Patrik
Scott Bishop
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- Enterprise Project Management solution online training
- Project Links

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- Project Portfolio Server Screen Shots
- Project Server Screen Shots

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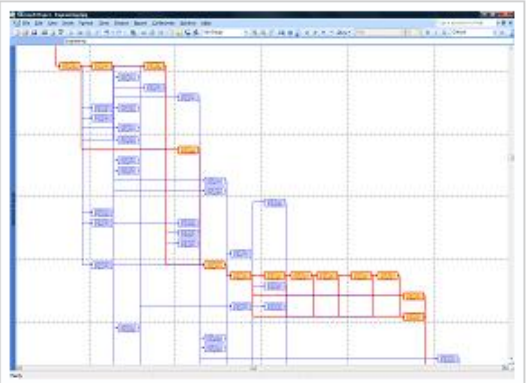
- EPM Live

Effective Project Management for Business Results



The Network Diagram: an essential tool in understanding the flow of project activities

Many companies have derived significant benefits by improving business processes with project management processes supported by Microsoft technology. One local manufacturer needed to decrease the time it takes to deliver their high-quality products to market. To do that, they developed a process that used Microsoft technologies to efficiently manage product development processes, projects, and information. A solution based on Microsoft's Enterprise Project Management Solution and Microsoft Visio provided them with the following benefits:

- Optimized the conversion of timelines to detailed project plans from days to minutes
- Delivered products to market faster and cheaper by increasing efficiency of project execution up to 20%
- Delivered great products every time by improving process consistency
- Increased capacity with a cost-effective and scalable organization
- Enabled REI to allocate more time for dedicated research

A recent study by KPMG consulting found that in 300 large companies across the US, 65% of projects are failing; they are behind schedule, over budget or not meeting requirements. Surprisingly, most of the interviewed executives considered this "normal" - neither surprising or particularly troubling. In our view, this is simply not acceptable, and our Business Productivity Specialists have the experience and expertise to help our customers deliver projects on time, on budget and that meet or exceed expectations.

Project Management methodologies help copmanies realize significant business value by:

- Improving the success of projects across the enterprise

Done
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100%

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