




Leveraging SharePoint for Project, Program, and Portfolio Management

Addressing the Challenges of Communicating, Coordinating, Controlling, and Complying

Delivered by
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at the
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DISCLAIMERS

-  This is **NOT** a marketing presentation
-  This is **NOT** a technical seminar
-  **DO** try this at home (work) if it makes sense to you

Agenda

- Introduction
- Challenges
 - Communications & Coordination
 - Control
 - Compliance
- SharePoint Features
- Application

Introduction

Survey

- What do you use to help you manage your projects, programs, and portfolios?
 - Amazing powers of memory
 - Paper documents
 - Electronic documents (word processing, spreadsheet, presentation)
 - A “Project Management Information System”
- How many of you currently use SharePoint to help you manage your projects, programs, and portfolios?
- How many of you have access to SharePoint?

The Challenges

Project Managers, Program Managers, and Portfolio Managers must each...



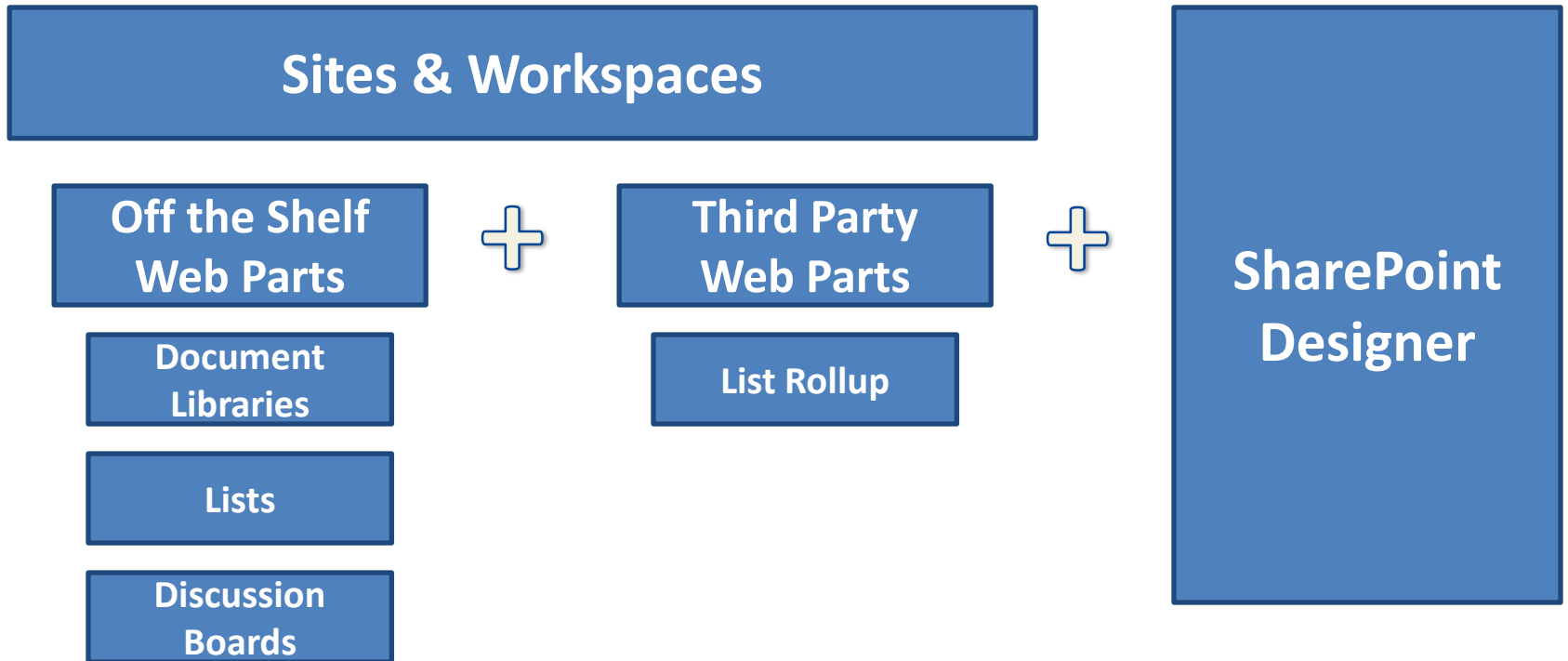
...in order to...



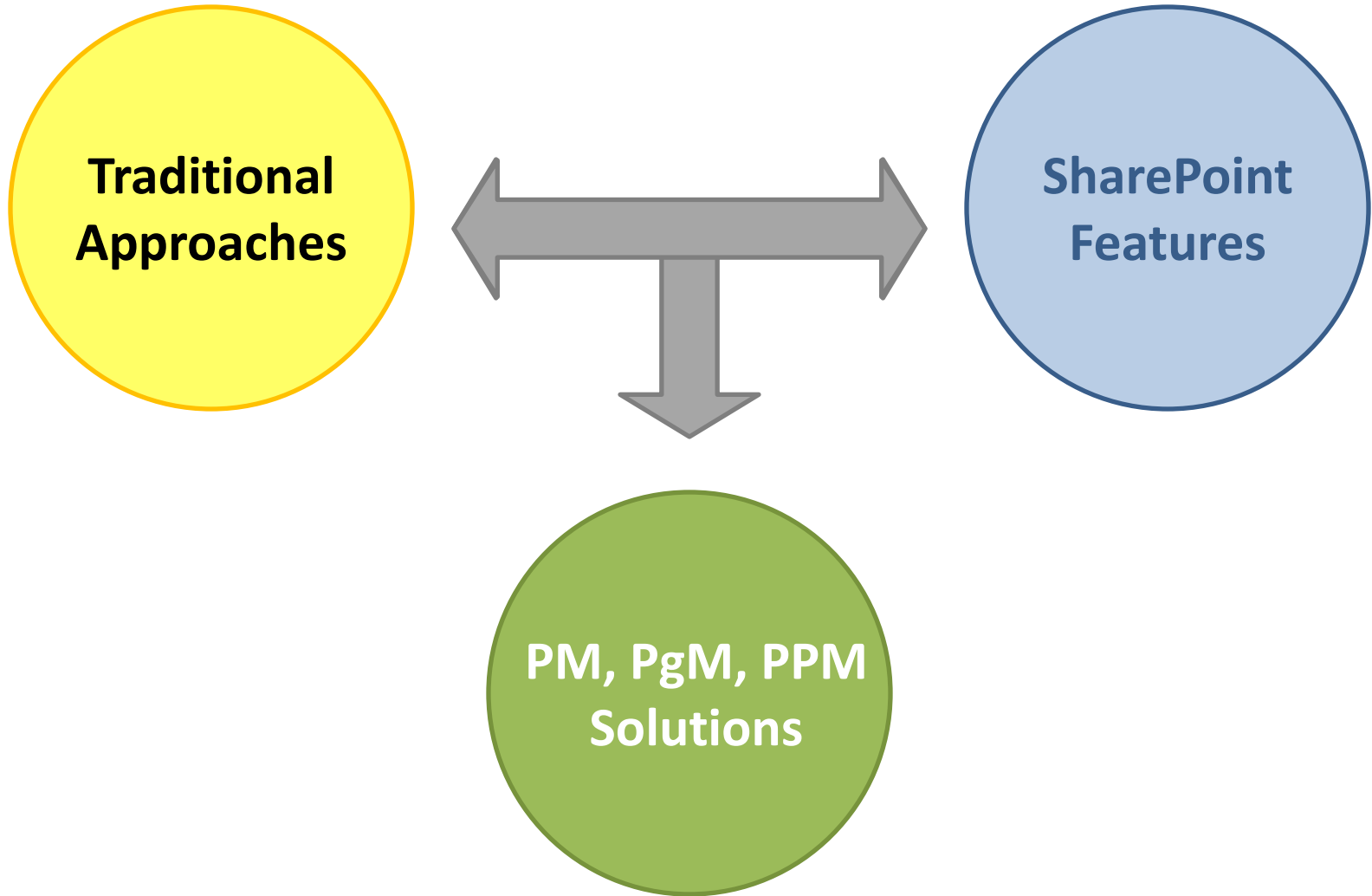
Traditional Approaches

Communicate & Coordinate	Control	Comply
<ul style="list-style-type: none">• Meetings• Teleconferences• e-mails• Documents• Lists• Three ring binders, file cabinets, file servers	<ul style="list-style-type: none">• Manual processes• Document templates• Lists• Meetings• Teleconferences• e-mails	<ul style="list-style-type: none">• Manual processes• Document templates

SharePoint Features



Our Objective



Communicate & Coordinate

Communicating and Coordinating

Project teams, stakeholders, and customers are all made up of people. People need to...

- Know what they are being asked to do
- Understand why they are being asked to do it
- Know how to do what they are being asked to do
- Know how they are doing
- Be motivated to complete their work and achieve their goals
- Collaborate to solve complex problems

...up front and throughout the span of the effort

Communicating on Projects

“Project Managers can spend an inordinate amount of time communicating with the project team, stakeholders, customer, and sponsor.”

--Guide to the Project Management Body Of Knowledge (PMBOK), Third Edition

“Project managers spend the majority of their time communicating with team members and other project stakeholders...internal...or external to the organization.”

--Guide to the Project Management Body Of Knowledge (PMBOK), Fourth Edition

Communications Trends

Research indicates that between 75 and 80% of the U.S. population now uses social media

- The majority of social media users are between the ages of 23 and 35 (~35%)
- Social media usage among those in older segments (36-49 and 50-65) has also increased significantly over the past three years

...these are the people that make up your project teams, these are your sponsors, stakeholders, and customers

Business Trends

- Decentralization
 - Mergers & Acquisitions
 - Expansion
 - Globalization
- Virtualization
 - Mobile work forces
 - Flexible work arrangements

Paradigm Shifts

Old School	New Normal	Paradigm Shifts
Test patterns	24 hr programming	Intermittent to constant availability
Newsboys	Newsbots	Push to pull
Filing cabinet	Websites	Ease of access
World Book	Wikipedia	Institutional to crowd-sourced
Rolodex	Social Media	Ease of connecting
Cubicles	Remote Locations	Decentralization, globalization
Face-to-Face	Voice, Video, & Text	Virtualization

Control

Control on Projects

The Project Manager and Team need to

- Baseline plans and performance expectations
- Monitor both performance and environment
- Identify, assign, and respond to risks
- Document, assign, and resolve issues
- Identify, assign, and follow up on action items
- Manage change requests

Comply

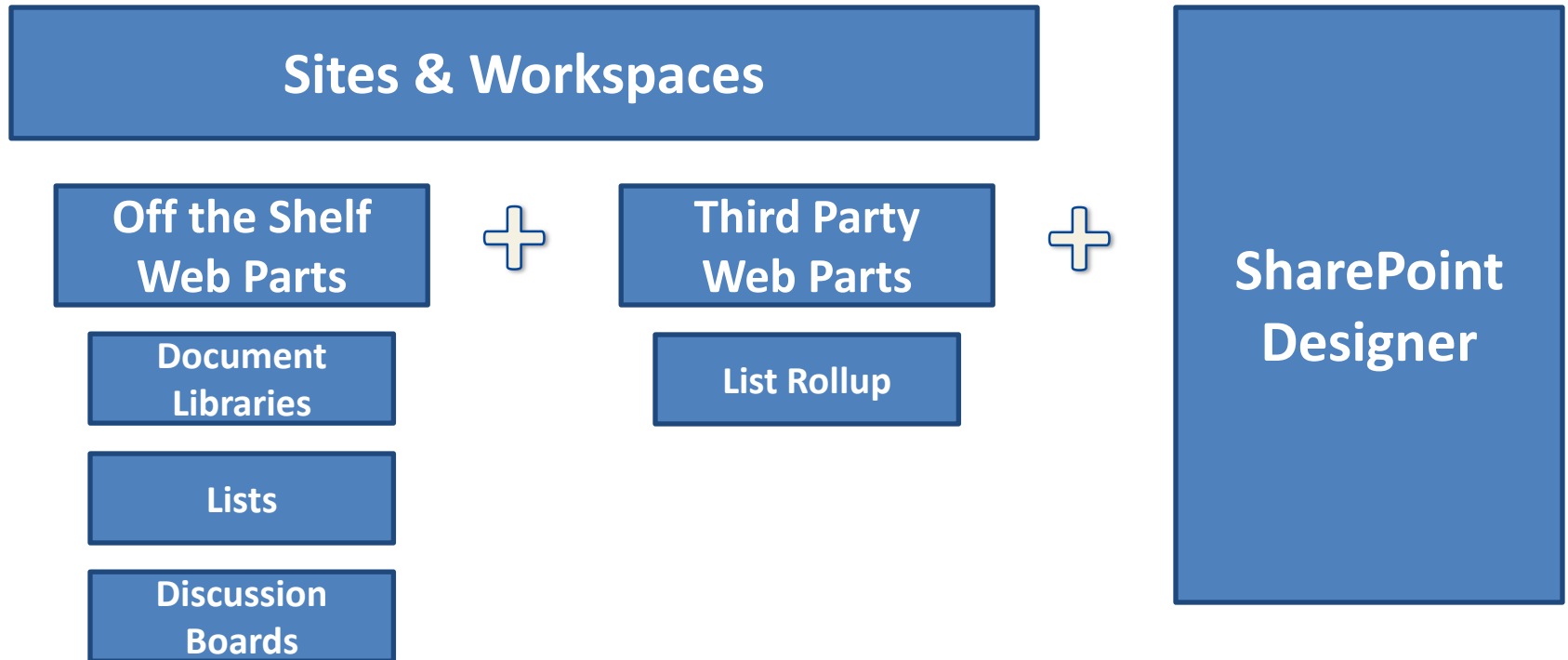
Compliance on Projects

The Project Manager and Team need to

- Ensure that the *project execution complies with organizational methodology and regulatory requirements*
- Ensure that the *project product complies with regulatory requirements*

SharePoint Features

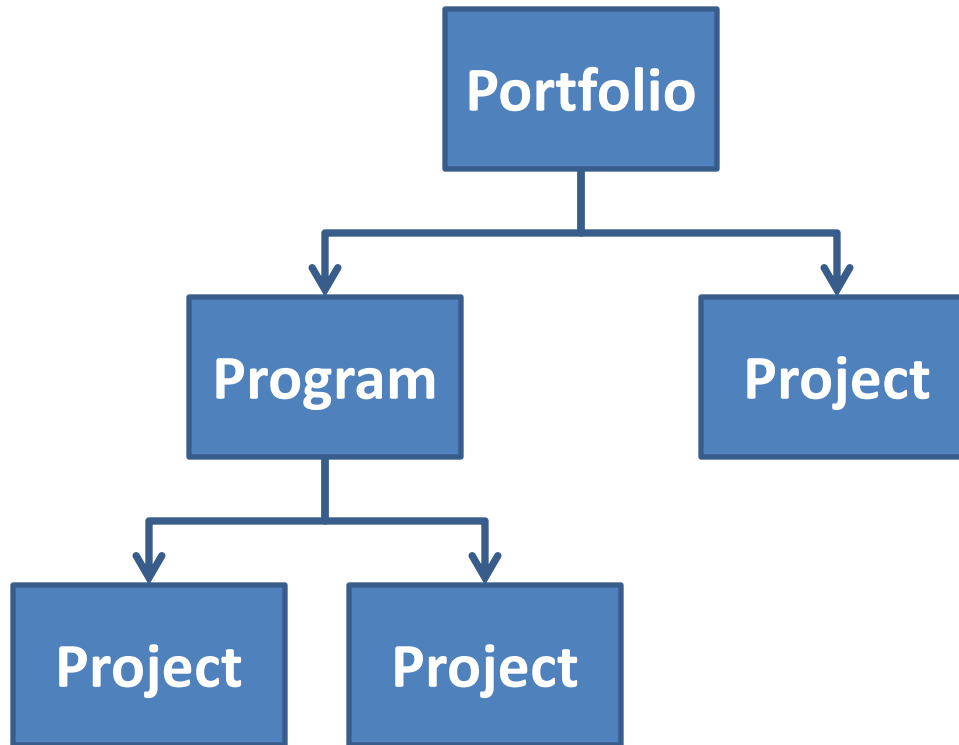
SharePoint Features



SharePoint Features

Element	Description
Sites & Workspaces	Web pages or hierarchies of web pages that contain multiple web parts that can be used to hold and manage project information
Document Libraries	Directories/subdirectories that can be used to hold and manage documents, worksheets, presentations, and other files
Lists	Gather, track, and share information (announcements, calendars/timelines, links, etc.); items on one list can be linked to items in another list
Discussion Boards	Specialized lists that allow site administrators and/or users to initiate and manage electronic conversations on specific topics
List Rollups	A specialized web part used to pull information from multiple subsites to a master site
SharePoint Designer	A tool that can be used to apply conditional formatting and create complex workflows

Hierarchy in the Project Space



Communication & Coordination

	Project Management	Program Management	Portfolio Management
Sites and Workspaces	<ul style="list-style-type: none"> • Single focal point for project, program, or portfolio • Use of templates ensures consistency in user experience 		
Document Libraries	<ul style="list-style-type: none"> • Allows structured storage of all project-, program-, or portfolio-related documents • Can setup alerts to notify specific individuals when documents are updated 		
Lists	<ul style="list-style-type: none"> • Easily accessible • Lists can be interrelated • Can set up alerts 	<ul style="list-style-type: none"> • Allows escalation of key items • Lists can be interrelated • Can setup alerts 	
Discussion Boards	Allows collaboration on emerging /evolving topics and issues among SMEs		
Rollups	N/A	Allows information entered at lower level sites to be escalated, not recreated	

Control

	Project Management	Program Management	Portfolio Management
Sites and Workspaces	<ul style="list-style-type: none"> • Individual and group permissions 		
Document Libraries	<ul style="list-style-type: none"> • Document Library and Document level permissions • Document check out/check in control • Draft item security • Document approval workflows 		
Lists	<ul style="list-style-type: none"> • List and list item level permissions • List item approval workflows 		
Discussion Boards	<ul style="list-style-type: none"> • Discussion Board and Discussion level permissions • Discussion approval workflows 		
Rollups	N/A	Allows manager to easily spot areas requiring attention or flagged for escalation	

Compliance

	Project Management	Program Management	Portfolio Management
Sites and Workspaces	<ul style="list-style-type: none">• Web Part content/layout can be arranged to support methodology and other requirements• Site templates can be established to ensure uniformity across projects, programs, and portfolios		
Document Libraries	<ul style="list-style-type: none">• Structure can support PM deliverable requirements• Can establish document templates for each folder• Document approval workflows• Version history and retention can be controlled		
Lists	<ul style="list-style-type: none">• Can be setup to mirror document templates• List item approval workflows• Version history and retention can be controlled• Can provide links to organizational policies/procedures		
Discussion Boards	N/A		
Rollups	N/A		

Application

Major Project Artifacts

Initiating	Planning	Executing	Monitoring & Controlling	Closing
Project Charter	Scope Definition	Assignments/ Action Items	Performance Reports	Operational Transfer Documents
Business Case	Project Management Plan	Quality Control/ Test Results	Risk Register	Lessons Learned Log
Stakeholder List	Detailed Requirements	Lessons Learned Log	Issue Log	
	QA / Test Plan	Discussion Board	Change Requests/Log	
	Requirements Trace		Go/No Go Document	
	Work Breakdown Structure		Lessons Learned Log	
	Estimates		Discussion Board	
	Staffing Plan			
	Vendor Documents			Document Library
	Schedule			List
	Budget			Partial/Hybrid
	Risk Plan			Approval Workflow
	Discussion Board			Discussion Board

Major Program Artifacts

Initiating	Planning	Executing	Monitoring & Controlling	Closing
Program Charter	Program Scope Definition	Component Initiation, Go/No Go Requests	Governance Decision Register	Operational Transfer Documents
Program Roadmap	Program Management/ Governance Plan	Assignments/ Action Items	Performance Reports and Forecasts	Lessons Learned Log
Financial Framework	Benefits Realization Plan	Quality Control/ Test Results	Component Perf. Rpts. and Forecasts	
	Program Requirements	Lessons Learned Log	Risk Register	
	Components	Discussion Board	Issue Log	
	Program WBS		Change Requests/Log	
	Cost Estimates		Program Go/No Go Document	Document Library
	Staffing Plan		Benefit Realization Tracking	List
	Vendor Documents		Lessons Learned Log	Partial/Hybrid
	Master Schedule		Discussion Board	List Rollup
	Budget			Approval Workflow
	Risk Plan			Discussion Board
	Discussion Board			

A SharePoint Program/Project Page

http://www.sitetest.com/sites/organization1/portfolio1/program1/samplesite1/default.aspx

Organization > Portfolio > Program > Sample Site

Welcome Dean Wesley Farmer | My Site | My Links

SharePoint Program/Project Site Example

This Site: Sample Site

Site Actions

View All Site Content

Lists

- Calendar

Documents

- Project Charter
- Risk Analysis
- Business Requirements
- Solution Design
- Statement of Work
- Test Plans and Results
- Requirements Trace
- Communication Plan
- Workplan/Schedule
- Meeting Agenda and Minutes
- Status Reports
- Readiness Assessments
- Post-Implementation Review (PIR)
- Shared Documents

Links

- Team Member Lookup
- Guide to the Project Management Methodology
- User's Guide for Project sites
- Print-formatted Status Report

Profile

Project Description	Project Risk Rating	Customer Business Area	Business Leader	Business Support Leader	Stakeholders/Team
Develop SharePoint project, program, and portfolio pages with document libraries tailored to corporate methodology deliverable requirements and status, timeline, financial, risk, issue, and change logs	Low	Sales Channels; Marketing; Product Management	Charlie Delta	Juliet Kilo	Mike November; Romeo Sierra; Victor Whiskey

Status

Overall Status	Trend	% Complete	Status Update	Items for Management Attention	Modified
●	↑	60%	<p>Accomplishments this period:</p> <ul style="list-style-type: none"> Recovered to green status. Senior leaders have approved necessary changes. Seed funding has been secured for requirements gathering and sizing of Lessons Learned log. <p>Activities next period</p> <ul style="list-style-type: none"> Complete detailed requirements gathering for Lessons Learned log Begin testing of process changes Begin review of training collateral 		

Status Key & Definitions		Trend Key & Definitions	
●	Approved scope will be delivered and all key milestones will be met within allocated budget; minimal risk of unplanned negative financial impacts or schedule delays; workarounds for adverse impacts on Clients and/or Team members are agreed to, managed through change control, and are feasible to be implemented.	↑	Project status has improved since last update.
▲	Issues currently preventing delivery as approved are in the process of being researched or resolved; negative financial impacts or schedule delays have been identified and plans are being put in place to address; workarounds for adverse impacts on Clients and/or Team Members are in development.	→	Project status has remained stable since last update.
◆	Issues currently preventing delivery as approved require immediate resolution or a change to scope, schedule, and/or budget; significant negative financial impacts or schedule delays have been identified and plans are being put in place to address; significant workarounds for adverse impacts to Clients and/or Team Members are in development.	↓	Project status has deteriorated since last update.

Timeline

ID	Milestone/Task	Planned Start	Planned Finish	Planned Duration	Actual Start	Actual Finish	% Complete
1	Sponsor approval	6/1/2011	12/12/2011	194	6/1/2011	12/12/2011	100%
2	Project kickoff	9/1/2011	3/31/2012	212	10/17/2011		100%
3	Project Management Plan completion	11/1/2011	3/31/2012	151	10/17/2011		100%
4	Requirements definition complete	11/1/2011	3/31/2012	151	3/1/2012		100%

A SharePoint Program/Project Page

Financials

ID	Funding Description	Approved Budget	Actuals + Outloc	\$ Variance	% Variance	Variance Explanation
1	Initial Funding	\$1,920,000	\$1,873,000	(\$47,000)	-2%	Favorable variance due to delay in ramp up of contract resources in Oct. 11
2	Phase 2 - 4/1 to 12/31/12	\$1,504,000	\$1,503,000	(\$1,000)	0%	

Risks

ID	Title	Workstream Impacted	Risk Factor	Response Strategy	Response Plan	Owner	Status
1	LOB commitment to adopting a consistent approach	All	Very High	Mitigate	Scheduling meetings with PMO and PM group leads to gain agreement	Charlie Dog	Monitoring
2	Methodology decision by PM COE	Document Libraries and Templates	Very High	Accept	Use contingency buffer to accommodate any changes to methodology	George How	Monitoring

Issues







ID	Title	Impact	Workstream Impacted	Recommended Resolution	Target Resolution Date	Owner	Status
3	SharePoint Designer availability	High	User Experience	Work with Technology Standards and Enterprise SharePoint teams to get exception for use of SharePoint Designer by project teams	12/31/2012	Mike Nan	Open
1	SharePoint maintenance upgrade window	Medium	All	Postpone completion of initial page development until after maintenance occurs			

Change Control Log

ID	Change Name	Impact Rating	Change Description	Date Needed	Change Decision	Change Status
1	Lessons Learned Log	High	Implement a Lessons Learned log that can capture lessons (positive and negative) as the program/project is planned and executed. This should be captured in a list local to the project, but aggregated at the Enterprise level. This will permit more timely and accurate capture of information as well as providing a knowledge base for use when ideating, initiating, and planning future efforts.	7/20/2012	Pending	In Progress

A SharePoint Program Page

Sample Site Project Profile and Status Rollup

Project Name	% Complete	Overall Status	Trend	Status Update	Items for Management Attention	Modified
User Experience	80%			<p>User experience workshops have progressed. To date:</p> <ul style="list-style-type: none"> • Three workshops held in St. Louis, Charlotte, and San Francisco • 44 participants, including PMs, sponsors, and select stakeholders • Initial responses positive, but identified need for Lessons Learned log, to be present on each site, but with the ability to rollup and query at a corporate level. This dovetails with anticipated changes to Project Initiation processes in upcoming methodology revision. • Documenting and assessing change • Will conclude user workshops next period. 		10/10/2012
Document Libraries	25%			<p>Concluding development of document libraries, including structure, templates, draft security, check in-check out, document version control, version retention, and approval workflows.</p>	None identified at this time.	10/10/2012
Integrated Management Lists	99%			<p>Concluding initial development of integrated management lists and associated approval workflows</p> <p>Completed:</p> <ul style="list-style-type: none"> • Status • Timeline • Financial • Risk • Issue • Change <p>In progress</p> <ul style="list-style-type: none"> • Project profile/ status rollup 	none	10/10/2012

Major Portfolio Artifacts

Aligning

Portfolio Definition & Strategic Goals

Portfolio Governance Plan

Portfolio Component Descriptions

Portfolio Component Evaluations

Portfolio Governance Decision Register

Portfolio Component List

Portfolio Milestone Timeline

Discussion Board

Monitoring & Controlling

Component Initiation, Go/No Go Requests

Performance Reports and Forecasts

Component Performance Reports and Forecasts

Risk Register

Issues Log

Change Requests/Log

Lessons Learned Log

Strategic Goal Tracking

Discussion Board

Document Library

Partial/Hybrid

List Rollup

Approval Workflow

Discussion Board

A SharePoint Portfolio Page

The screenshot displays a SharePoint site titled "SharePoint Portfolio Site Example". The browser address bar shows the URL: <http://www.sitetest.com/sites/organization1/portfolio1/default.aspx>. The site navigation includes "Organization > Portfolio" and a user profile for "Dean Wesley Farmer".

The main content area is titled "Portfolio, Program, and Project Management Center Of Excellence". It includes a "Portfolio Description" with the following details:

- Vision:** To deliver all programs and projects successfully
- Strategy:** To promulgate best practice processes, tools, and training
- 5-year Strategic Goals:**
 - 95% success rate on programs and projects
 - Attract, retain, and excite the most talented program and project managers
 - Movement to a delivery oriented PMO

Executive Owner: Nan Oboe, Business Lead: Oscar Papa, Portfolio Manager: Victor William.

The "PM COE Initiative Status Rollup" table is highlighted with a red border and contains the following data:

SI Name (link)	Overall Status	Trend	Status Update	Items for Management Attention	Modified
Recruiting			New for 2013		10/22/12
Processes	●	➡	Project processes drafted and in review; scheduled 15-Dec release. Program and portfolio processes under development; discussion draft scheduled for 20-Dec.		10/22/12
Tools	●	➡	Initiation template revisions under review for 01-Nov release. Planning template revisions still in process for 01-Dec release. Execution/Monitoring & Control template review underway.		10/19/12
Training	●	➡	Web-based training in development for 1Q13 release (pending full funding). Brown bag seminar series scheduled to start in Jan-13. Internal PM certification course being discussed with sponsors and stakeholders.		10/24/12

Below the table are two key definitions:

- Program Status Key & Definitions:**
 - No issues exist which would prevent delivery of program benefits.
 - ▲ Issues currently preventing delivery of program benefits are in the process of being researched or resolved.
 - ◆ Issues currently preventing delivery of program benefits require immediate resolution or a change to scope, schedule, and/or budget.
- Program Trend Key & Definitions:**
 - ⬆ Program status has improved since last update.
 - ➡ Program status has remained stable since last update.
 - ⬇ Program status has deteriorated since last update.

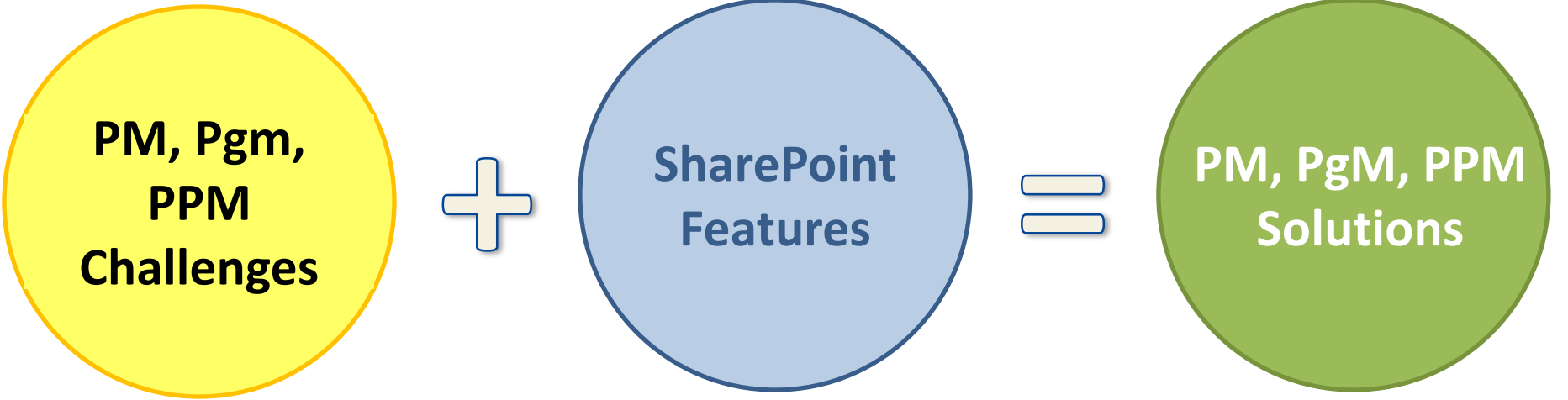
Recap

Communicate & Coordinate	Control	Comply
<ul style="list-style-type: none">• Meetings• Teleconferences• e-mails• Documents• Lists• Three ring binders, file cabinets, file servers	<ul style="list-style-type: none">• Manual processes• Document templates• Lists• Meetings• Teleconferences• e-mails	<ul style="list-style-type: none">• Manual processes• Document templates
<ul style="list-style-type: none">• Announcements• Discussion Boards• Alerts• Approval Workflows• Rollups	<ul style="list-style-type: none">• Integrated Risk, Issue, and Change registers/logs• Approval workflows• Timeline list/calendar• Action items list• Status Tracking	<ul style="list-style-type: none">• Integrated Risk, Issue, and Change registers/logs• Document templates• Approval workflows• Links to other organizational process assets

Steps to Get There

- Get administrator access
- Get SharePoint Designer
- Get a book or find a tutorial on SharePoint and SPD
- Create a site template
 - Create site
 - Add web parts (Document Libraries, Lists, Surveys, Discussion Boards)
 - Customize web parts (fields, views)
 - Save as template
- Create operational sites from template

Mission Accomplished?



**PM, Pgm,
PPM
Challenges**



**SharePoint
Features**



**PM, PgM, PPM
Solutions**

Questions?

Thank you.