

From Excel to PPM – A Journey

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Who am I? What am I doing here?

- Project Delivery Department (IS Strategic)
 - 3 Teams
 - 6 Project Managers
 - 7 Analysts
 - 3 Delivery Managers
 - 1 Department Manager
 - 1 CIO

Distributed project information (2012)

- Support Services Portfolio - In Excel!
- Holdings Portfolio - In Excel!
- Capital Works Portfolio - In Excel!
- Project Finances - In Excel!
- Project Risks - in Excel!
- Project Issues - in Excel!
- Project RAG Codes – In Excel!
- Project Dependencies – In Excel!
- Project Plans – In MS Project – or Excel!

Risk Analysis		Pre-Mitigation Risk Analysis (Financial)										Risk B	
Risk Status	Event/Issue/Process/Date Type	Probability (N)	Effort in Days	Prevent Mitigation/Qualification Method	Cost of Mitigation (Euro (€))	Cost of Program Delays (Euro (€))	Weighted Cost of Risk	Revenue Milestone Impacted	Revised Milestone Date	Response Strategy	Action	Risk B	
Red	17-Feb-14	90.0%	15.0	€ 12	€ 150	€ 300	€ 300	M12	15-Feb-14	Acceptance	Take it on the chin		
Red	1-Jan-14	20.0%	12.0	€ 70	€ 200	€ 125	€ 54	M05	15-Jan-14	Mitigation	Rip and tickle		
Red	1-Dec-13	70.0%	33.0	€ 45	€ 300	€ 45	€ 100	M13	15-Dec-13	Contingency	Delay for release		

Risk Summary					
Probability	Impact	Risk Score	Mitigation	Status	Date Identified
MEDIUM	HIGH	LOW - 4	Update the log soon	Milestone at Risk	01-Jan-14
HIGH	HIGH	MEDIUM - 5	Management decision required	Milestone Missed	11-Sep-13
LOW	HIGH	HIGH - 15	Management decision awaited	Milestone Missed	01-Nov-13
HIGH	LOW	MEDIUM - 10	Add risk mitigation actions to the plan	Milestone at Risk	02-Feb-14

Framework Overall											
Project	Manager	Risk	Issue	Quality	Cost	Time	Compliance	Health	Overall	Overall	Overall
Project 1	Manager 1	A	G	G	A	G	G	G	A	A	G
Project 2	Manager 1	G	A	G	G	G	G	G	G	A	A
Project 3	Manager 1	A	G	G	G	G	G	G	G	G	G
Project 4	Manager 2	G	A	G	R	A	A	R	R	R	A

Task Name	Duration	Start	10 Apr 13	18 Apr 13	27 Apr 13	05 May 13	14 May 13	22 May 13	30 May 13	07 Jun 13	15 Jun 13
1											
2	23 days, Mon 08:00:00										
3	Research cabinet	5 days, Mon 08:00:00									
4	Initial sample menu	1 day, Mon 10:00:00									
5	Caterers reply	10 days, Tue 17:00:00									
6	Menu selection meeting	1 day, Tue 09:00:00									
7	Open approval from restaurant to chef	5 days, Wed 07:00:00									
8	Check suitability with venue	5 days, Wed 07:00:00									
9	Place order	1 day, Wed 08:00:00									
10	When the reception menu is booked	3 days, Wed 08:00:00									

Which complicated

- Project Progress Tracking
- Project Status Updates
- Management Reporting
- Highlight Reporting
- Project Board Reporting
- Report Distribution
- Confidentiality
- Visibility of information at Project and Portfolio levels
- Fundamental Project Controls



Which led to - confusion

- Project Portfolios were regularly overwritten, making it impossible to track historical progress
- Project Managers were in competition with each other each period when attempting to update the Portfolio Spreadsheets
- Project Rag Codes would “bounce” between Green, Amber or Red. Most PMs took the middle road and kept their projects on Amber!
- Projects would be frequently and stealthily re-baselined!



And major control gaps

- What are the top three risks in the Project Delivery Portfolio?
- What projects did we start and close in the previous year?
- Provide a breakdown of all intra-project dependencies.
- What is Business Analyst X working on for the next three months?
- When can you start the Supply Chain Re-development project?
- What are all these people working on?
- When will project Y finish?

Which PPM solution ?

I considered:

Big Systems – too complex & expensive (i.e. MS Project Server & CA Associates Clarity)

Cheap/free Systems – too flaky, no support and lacking in functionality (i.e. Shareware)

Finally I found

PM3
From
Bestoutcome



I am now able to

- Provide comprehensive Project Portfolio reporting
- Analyse Risks and Issues at a Project or Portfolio level
- Enforce Project Baselines!
- Share the information
- Protect the information
- Simplify information distribution
- Immediately detect when projects are deviating from plan
- Provide comprehensive resourcing information



Willmott Dixon – the future

- The future is bright, the future is PM3
- Drive up data quality
- Bring our Project Sponsors into the PM3 fold
- With our partners in Bestoutcome we will go on to continually improve upon an already excellent and affordable PMO tool



Questions