



Enterprise Project Management and the U.S. Armed Forces

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EXECUTIVE SUMMARY

A branch of the U.S. Armed Forces had an objective to implement an Enterprise Project Management (EPM) solution in order to bring into line newly formed organizational goals and objectives related to its enterprise project management practices and to better manage resources and assignments with greater efficiency. EPC Group set out to assist the client in achieving the EPM solution by recommending a phased approach to the implementation. After an Envisioning phase to determine the common vision and goals of the project, recommendations were made to the client about how to solve issues in 5 different key areas: Business Challenges or Opportunity for Improvement, Objectives of the EPM System Initiative, Process Readiness, People (Organizational Change), and Technology Readiness. Additional risk management strategies were analyzed to alleviate potential shocks from the implementation of new technologies, as well. The actual implementation then occurred, and the realized benefits for the client could be observed. These benefits aligned with the needs of the client; in addition, extra positive consequences were also achieved. This case study focuses on the process that was taken to ensure that the Enterprise Project Management (EPM) solution solved the needs of the client through a phased approach beginning with an assessment phase and ending with the actual implementation.

NECESSITY FOR AN ENTERPRISE PROJECT MANAGEMENT SOLUTION

Initially, when a division of the U. S. Military approached EPC Group with a desire to implement an Enterprise Project Management (EPM) solution, the organization faced a myriad of problems related to its organizational structure and handling of enterprise projects. No formal Project Management Process existed, and no standards were used consistently across the organization. Without the adoption of standardized processes and methods, it made it difficult to measure project performance against a set of common benchmarks. In turn, this made it difficult to determine areas for improvement before starting new projects. Additionally, the client did not currently have the tools to proactively manage the allocation of its resources, making it more difficult to commit to customer deadlines.

The purpose of the EPM solution was to serve as a way to identify and standardize enterprise project management practices and provide the executive leadership with a strategic view of all programs. This would help optimize internal resources and manage contracts efficiently. Additional objectives were to:

- Improve overall portfolio performance and achieve strategic objectives.
- Achieve more efficient utilization of resources.
- Reduce program management cost per unit of program benefit due to better management of project schedules and more efficient resource allocation.
- Improve program benefit realization from new business opportunities pursued using cost savings.

APPROACH RECOMMENDATION

A phased approach was recommended as the implementation method during the project in order to provide a viable EPM solution. Each phase had specific deliverables to provide functionality and ensure a successful implementation. Items listed in each phase give an understanding of what would be delivered.

- **Phase I - Perform Envisioning and Assessment:** This phase outlines the findings and recommendation for moving toward a successful Enterprise Project Management (EPM) implementation. This effort would

include assessment of organizational and project structure, project management processes and resource allocations, infrastructure analysis, system notification requirements, gap analysis, user group definition and design, and system and organization requirements.

- **Phase II – Requirements Analysis and Design:** Detail requirements would be documented and a design of the system and project management processes and templates would be created. EPC Group would conduct requirements gathering sessions to work with the client to identify all the detailed requirements needed. These requirements would cover Program, Project, Task and Resource custom field information, Key Task and Milestones, reporting, views and dashboards, security, system, environment, software functionality, time tracking and task updates, testing, training, resource information, resource utilization and management, documentation, status reporting, issue tracking, risk management, organizational policies, work products, program dependencies, project tracking, PM standards and processes, project templates, enterprise calendars, and configuration needs. In addition to those requirement categories, additional categories could be added. Project Workspace and Collaboration requirements would also be defined within this phase. Within the requirements gathering session, Subject Matter Experts would provide best practices recommendations when needed to assist with requirement decisions.
- **Phase III – Software Installation and Configuration:** This phase would include the installation of MS Project Server 2007 on a Windows 2003 Server, as well as connections to other components such as SharePoint Portal Server 2007 Server (MOSS) and MS SQL Server 2005 or greater. The system would be configured to deploy in a workable EPM test environment. During this phase custom templates, calendars and resources would be added to give the system all working aspects to replicate a production environment for testing (as close as possible). Additionally, In-house staff assisted and observed the installation and configuration. This ensures knowledge transfer and to give the support staffs more in-depth knowledge of the EPM system.
- **Phase IV – Testing/Training/Deployment:** Testing would be performed on the EPM Solution. Two pilot teams would be established for the testing phase. System Administration, Project Management and Project Web Access hands-on training would be conducted to ensure resources are prepared to enter the system, as well as future resource training needs. The training and production environments would be installed, fully configured and tested for operation. These environments would be setup with all enterprise templates and calendars, as well as resources pool information. In addition to the environment setups, training, and testing, a deployment of the enterprise project management solution would be rolled-out to the organization.

ENVISIONING PROCESS AND ASSESSMENT RESULTS

The Envisioning process was the primary focus of the initial Discovery phase of the implementation. It provided key stakeholders with an orientation of the Enterprise Project Management (EPM) solution and an opportunity to collaborate and gain consensus on a common vision for EPM within the organization. This vision included an enterprise wide view of the primary business challenges addressing the organization, the key business objectives for implementing EPM, and an agreed upon decision regarding the use and strategy for the initiative.

The Envisioning process also incorporated a review of collaboration and communication needs outside of EPM. This involved a capabilities review of the Microsoft SharePoint technologies and how they may be used to meet objectives that cannot be accomplished solely with the EPM solution. The Envisioning workshops conducted on this project did include sessions on Collaboration and Communication.

As part of the EPM Envisioning process, the following sets of activities were conducted:

- **Questionnaire and Key Messages Summary:** A questionnaire was completed to gain a better understanding of how the client currently managed its business, people and processes. The results were compiled and communicated during the Envisioning Workshop.
- **Kick-off Meeting:** A formal meeting was conducted to communicate EPM project goals & objectives, scope, roles and responsibilities, and timeline.
- **Envisioning Workshops:** A series of workshops were conducted to secure feedback on the client's vision in the areas of project management and scheduling, resource management, timesheets, issues and risk.

INITIAL STATE FINDINGS

The findings of the envisioning workshop sessions, surveys collections, and personal interviews were categorized into five main organizational groups of findings:

1. **Prioritization of Business Challenges or Opportunity for Improvement:** The business challenges or opportunities for improvements were ranked based upon the respective consequences for not responding.
2. **Prioritization of Objectives of the EPM System Initiative:** The objectives of the EPM System Objectives were ranked, as well.
3. **Process Readiness:** The EPM capability areas were rated in the categories of priority to the organization, whether a formal or informal process existed, and what the perception of the process was as viewed by the organization.
4. **People (Organizational Change):** Important considerations for managing change in the client as well as EPC Group's observations throughout the Envisioning process in the areas of successful communication, implantation, and way to better understand the user community.
5. **Technology Readiness:** The client had invested in their resources and the structuring of the EPM technical team. By identifying the team that would support the EPM implementation, as well as leveraging staff development in the appropriate tools, this would assist the organization in the preparation for the implementation. The client had already leveraged Windows SharePoint Services (WSS) in a limited capacity as well as investments in other Microsoft technologies (e.g. SQL Server, Active Directory, etc.). Supporting the previously mentioned technologies would require the combination of technical and non-technical staff. Both sets of technologies (Project Server & SharePoint) included routine responsibilities to maintain the applications as well as enhancement abilities to make them more productive for the user communities for which they serve. Additional application administration training on all mentioned technologies would be needed for the support staff.

By performing the above phases and activities included within them, the areas of improvement, processes, and EPM objectives were addressed and recommendations were made.

RISK PLANNING AND MITIGATION STRATEGY

Primary risks associated with this initiative centered around the cultural shifts from informal to more structured and consistent processes, as well as a shift to increased visibility of information regarding resource utilization and project status. Successful adoption with an adequate level of training on the tool was necessary, and the processes

it supports. In addition, executive management had to foster an environment of continuous learning and shared organizational goals. Successful user adoption within the organization was critical before deploying EPM to the entire organization.

This section addressed the factors that the client had to put into place to increase initiative success. The organization had to be aware of conditions that will introduce risk and look for these conditions, document them, and bring them to the sponsor's attention. By raising awareness of risks, the team initiated the process of developing mitigations and enabled informed decisions.

Conditions that can introduce significant risk to an EPM initiative include:

- Insufficient formal project management expertise among organization staff.
- The expectation that the introduction of the technology will drive the business-process changes (Note: Processes may be developed and rolled out in tandem with the technology. However, the technology should not be the sole driver for the process.)
- Sponsorship that is unwilling to champion the necessary process discipline and technology use.
- An aggressive implementation schedule that cannot be met due to the complexity of the business-process changes.
- A lack of sufficient technology, project management, or change-management skills in the EPM team.
- Lack of user involvement in the design of the business processes or technology configurations.
- Lack of EPM initiative support from key roles or groups within the organization.
- Lack of commitment by the EPM pilot teams.
- A shift to EPM may threaten people who are accustomed to keeping their project data private.
- An increase in the visibility of project data will expose people's skills in both project management processes and the use of the Microsoft Office Project 2007 technology.

ACTUAL IMPLEMENTATION

In the Approach Recommendation section, each phase was outlined as to what ought to be implemented during the project. The following section tracks the actual implementation process that occurred.

First, EPC Group and the client established a consensus on the information contained within the Envisioning and Initial State Findings sections of this case study (e.g. business objectives, current state, recommendations, risks, and next steps). Phase I then took place as planned. Requirements for the EPM implementation were developed, including but not limited to business, functional, reporting, training, testing, security, process and documentation, system and environment requirements. Pilot team members and projects were identified and planning for the pilot and selecting the best projects for the pilot of EPM occurred. Next, organizational training was delivered including EPM Administration, Project Management, and Project Web Access training, as well as job assistance tools ("How to" documentation, cheat sheets, etc).

Based off of the detailed requirements, EPC Group created the technical design and specifications of the EPM system and creation of process documentation. Guided instructions and support from EPC Group for the on-site support staff to setup hardware and server software and the configuration of the system took place. This was followed by the preparation for the EPM deployment, including the testing of the system, training of resources, and planning for the EPM rollout.

Afterwards, Functional Administrators, Project Managers and End Users were identified and formally trained. The client subsequently developed the plan for preparing the User Community for Change and the Communication Plan for EPM Go-Live. Finally, the launch of two pilot projects and the utilization of the system began. Resources reported task updates, monitored and controlled project schedules, as well as obtained feedback for process improvements.

POSITIVE IMPACT

After the implementation of the EPM solution occurred, the following positive results were realized for the branch of the military:

- The client is able to better understand the time spent on IT projects vs. time spent on support activities and staff accordingly.
- Through standardized and institutionalized processes, a formal Product Management Organization (PMO) and extensive hands on training, a formal Project Management Process is being followed for managing projects from initiation to production.
- Executives are gaining the visibility needed for project/work priorities across the organization and are able to now monitor project performance based on more accurate data and remediate problems in a more timely manner.
- The Military Branch now has the tools to proactively manage the allocation of resources and achieve more efficient utilization of resources.
- Management is now obtaining total project costs including labor, equipment and operational costs for projects.
- Standards are now being used consistently across the organization allowing for improved reporting and data analysis.
- Project Workspaces are giving the client the capabilities for storing and collaborating on documents and work activities for each project which is providing consistencies of processes and reducing duplication of project documentation.

Through the formalized phased approach outlined in this case study, this branch of the U.S. Armed Forces was able to not only able to streamline enterprise project management practices, but provide organizational leadership with a tactical view of all programs to maintain efficiency throughout the client's coverage. The EPM Solution allowed the client to meet its organization goals and needs beginning with the assessments phase, progressing with recommendations and creating a proactive risk management policy, and continuing with the actual implementation.