Essential Project Management Skills for "Non-Project Managers"

Presenters:

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Date: May 19, 2014

Essential Project Management Skills

BBI/Evolve™ at Bernalillo County

Presented by

Maria Zuniga

Chelle Stringer

May 19, 2014

AGENDA

- Bernalillo County

- Budget and Business Improvement Department
  - ERP

- BBI/Evolve™

- Phases
  - Activities
  - Templates and Tools
  - Lessons Learned the Hard Way

BERNALILLO COUNTY

- Located in central New Mexico
- Incorporates the City of Albuquerque
- Population is 662,564
- Employs 2,465 full time employees
- 5 Commissioners – elected by district
- 5 Elected Officials – Assessor, Clerk, Probate Judge, Sheriff and Treasurer are elected countywide
- County Manager oversees 24 County departments that range from animal services to zoning
- General fund annual budget of $237 million and budget for all funds of $508 million
- Employs 2,465 full time employees

BUDGET & BUSINESS IMPROVEMENT

- **The County Need:**
  - Increased utilization of the ERP functionality in conjunction with improved business processes to increase effectiveness and maximize efficiencies

    ### AUTOMATE MANUAL PROCESSES

  - Increase the utilization and adoption of ERP related projects
  - Increase the accuracy of financial information
  - Enhance the County's ability to forecast financial needs such as short term cash flow requirement

BUDGET & BUSINESS IMPROVEMENT

- **The Solution:**
  - Budget and Business Improvement (BBI) Department was formed to more strategically align the budget with county priorities, business process improvements, and technological efficiency
  - ERP moved from IT to Finance/BBI department
    - Finance is now the owner of the system as opposed to the customer
    - Links ERP with strategic priorities with a focus on technology and automation
    - Use limited resources to implement technology that end users will use to increase efficiencies
  - Evolve™ methodology tailored to county needs and culture

BBI/EVOLVE™

| Pre-Project Planning | Project Start-Up | Blueprint | Realization - Part 1 | Realization - Part 2 | Final Prep | Go-Live & Intensive Support | Post Go Live Support & Stabilization |

- Scalable, repeatable process for project management, operational readiness, and system adoption
- Engage all stakeholders in all phases of implementation in a meaningful way at the appropriate level of effort
- A method to ensure the organization (procedures, roles, equipment, authority levels) and the new functionality will go live at the same time, thus reducing post go live decrease in productivity and user frustration
- Address the situation where an ERP project is delivered on time, within budget, and within scope, yet the leadership is not confident the project was successful, the users are dissatisfied with the new functionality and processes, the new functionality is only partially used, and productivity is either the same or decreased

BBI/EVOLVE™

Pre-Project Planning

- Prior to system consultants being on site
- Initial requirements gathering
- Develop project success indicators & measures
- Develop department performance measures/ROI
- Begin to develop Project Information Form
- Develop & issue RFR

Project Start-Up

- Begins when project is funded
- Evaluate vendor responses, select vendor, and finalize SOW and TRS
- Develop the desired phasing and sequencing and budget required
- Conduct technical review of hardware & software
- Project Advisory group is formed
- Finalize project role & resources
- Deliver project kick off

Blueprint

- System implementation consultants on site
- User blueprint workshops to develop and deliver PDD
- PDD approval/sign off process
- Finalize/freeze To Be business processes, per PDD sign off
- Begin implementing hardware and software environments and systems
- Initiate Operation Readiness by identifying operational impacts

Realization - Part 1

- Download software
- Begin system configuration
- Develop functional & technical specifications for Configuration Documentation Catalog
- Initiating Operational Readiness (AI, policies, procedures)

Realization - Part 2

- Complete system configuration
- Order equipment, install, configure, and test software
- Conduct operational readiness tasks an user involvement
- Update end to end business process swimlanes based on system configuration, in preparation for training, work instructions, and procedure development

Final Prep & Training

- Complete testing to ensure operational testing
- Critical reports are reviewed and approved by users
- Conduct Train the Trainer
- Conduct end user training
- Ensure functional & technical support is in place
- Work with departments to use system

Go-Live & Intensive Support

- System implementation consultants reduce support
- Conduct post go live labs Identify and fix bugs
- Provide training for users not using system as designed
- Resolve issues
- Design and develop non go live critical reports, complete ERP Request Forms and clarify requirements

Post Go-Live Support & Stabilization

- Patches, bug fixes
- Upgrades
- Reports
- Knowledge transfer
- Retraining end users
- Revise/update work instructions
- Conduct table top reviews with users to identify and categorize issues
- Departments begin to monitor performance on their performance measures

Forms/Tools	Pre-Project Planning	Project Start-Up	Blueprint	Realization - Part 1	Realization - Part 2	Final Prep & Training	Go-Live & Intensive Support	Post Go-Live Support & Stabilization
High Level Timeline	Started	Completed	Utilizing	Utilizing	Utilizing			
Project Progress Report	Started	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	
Project Information Form	Started	Completed	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing
Success Indicators & Performance Measures	Started	Completed	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing
Major Tasks per Phase Timeline		Started & Completed	Utilizing	Utilizing	Utilizing	Utilizing		
Project Drivers and Options	Started	Utilizing						
Checklists per Role per Phase	Started	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing
Request for Response (RFR)	Issued	Completed						
Statement of Work (SOW)		Issued/Completed						
Task Resource Schedule (TRS)		Issued/Completed	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	
Project Decision/Action Report (PDAR)	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	Utilizing	
Swimlanes				Started (High level as part of PDD)	Started (Detailed business process)	Utilizing	Utilizing	Utilizing
Process Design Document (PDD)			Started-Completed	Utilizing	Utilizing	Utilizing		
Report Development Schedule (RDS)			Started	Utilizing	Utilizing	Utilizing		
Organization Impact Document (OID)			Started	Developing		Utilizing	Utilizing	Utilizing
Technical Design Document (TDD)			Started	Utilizing		Completed	Utilizing	Utilizing
Test Scripts					Started	Completed		
Work Instructions					Started	Completed	Utilizing	Utilizing
Post Go-Live Issue Clarification and Categorization Tracking Report							Started	Utilizing

PRE-PROJECT PLANNING

Activities

- Clarify business need and drivers
- Clarify desired outcomes, success indicators, post go-live performance measures
- Understand impact of/to ERP
- Identify departments involved, impacted
- Estimate order of magnitude cost: implementation, ongoing support and maintenance

Tools & Templates

- Project Success Indicators and Measures
- Post go live performance measures
- Project Information Form
- Project drivers and options

SUCCESS INDICATORS AND MEASURES

SRM Success Indicators & Measures and Performance Measures
3/26/14

OCM LLC

ERP Project Implementation Phases

Pre-Project Planning → Project Start-Up → Blueprint → Realization - Part 1 → Realization - Part 2 → Final Prep → Go-Live & Intensive → Post Go Live Support & Stabilization

Success Indicators and Measures

Success Indicator *The project will be a success when...*	Measure(s) *We will know when...*

All work related to the Shopping Cart and Purchase Order is done via workflow	• No manual processes are used to:
	  - Create
	  - Change
	  - Vendor registration

Eliminate stand-alone (eVRS, Oracle for Contracts which is tied to Application Extender Doc Link) systems and be fully integrated in SAP	• No longer using eVRS or Oracle

Vendor database is connected to SRM for e-bidding, supplier management, contract management, and integrated with vendor master creation in ECC	• Vendors are able to register and submit forms via vendor portal (described in eVRS section)
	• Eliminate current Oracle database used for contract management
	  - Able to build and route contracts for approval in SAP/SRM
	• Eliminate current eVRS database used for vendor
	  - Add functionality of eVRS
	• RFx processes will be automated and integrated

PERFORMANCE MEASURES

SRM Success Indicators & Measures and Performance Measures
3/26/14

Performance Measures (tracked post go-live)

- Cost savings realized from doing consolidated procurements based on commodities; trend of decrease per year; look at commodity codes per PO and look for duplications
- 90% of Shopping Carts are processed with 3 business days (does not apply to sole source)
- 90% of PO changes are completed within 5 business days

Project Information Form – MONTHLY BUDGETING INITIATIVE
4/7/14

ERP Project Implementation Phases

Pre-Project Planning → Project Start-Up → Blueprint → Realization - Part 1 → Realization - Part 2 → Final Prep → Go-Live & Intensive → Post Go Live Support & Stabilization

|	
Project Summary Written from user perspective, non technical language	Need the ability to budget by period (monthly) and report on budget to actual variances by period. There are two modules in SAP where budgeting occurs: CO (budget prep) and FM (budget execution). - Payroll – needs to be loaded based on the payroll feed o Adjustments to payroll only allowed with budget office approval - Equal allocation – e.g. for Office Supplies - Period based allocation – e.g. for Contractual Services – based on expected drawdowns per period - Projects – require allocation by quarter or month based on planned expenditures
Functional Specifications	How can this be made easier on the large departments with multiple cost centers and many GL accounts/commitment items? - Is creating summary level CIs to budget on but not post actuals to an option - Other options Capture data from excel spreadsheet and load it into CO.

Desired timeframe: Why do these dates need to be met.
   ▪ Ex: application no longer supported after X
   ▪ Ex: need functionality so we can do X before Y
	Need the ability to start entering budget in CO by mid-to-late January, 2014
	- Need basic reporting to be developed in CO during budget prep (need to define those reports)
	- Budget versions need to be defined
	Need ability in FM by July 1, 2014
	- Need A&E reporting for monthly budgeting
	- Budget transfers, etc.

Define desired outcome through success indicators and measures
 	
This project will be successful when…
   ▪ List success indicators
	This project will be successful when
	   • Able to get the FY15/FY16 budget in the system with an accurate monthly spread.
	      o At any point in time we can run a report to answer:
	         - Budget to Actual variance for a Department for Period (month)
	         - A&E by Period

SRM Project Drivers & Options
4/23/14

ERP Project Implementation Phases

| Pre-Project Planning | Project Start-Up | Blueprint | Realization - Part 1 | Realization - Part 2 | Final Prep | Go-Live & Intensive | Post Go Live Support & Stabilization |

Options

Option	Pro	Cons
Increase budget for maintenance and support of SRM 5.0	Purchasing resources are required only when their involvement is needed to address an error or bug	Functionality will not be added; current functionality will be maintained
		Known pain points will require work around solutions, rather than configuration
		Annual maintenance and license contract cost will increase every year per SAP contract
		Strategic Objectives for maintaining a system on most current and supportable versions will not be met
Implement SRM PPS 7.0 by March, 2015	SAP provides support packs, patches, and bug fixes	Heavy requirement on Purchasing and ERP resources for the length of implementation
	One time funding required is offset by the savings realized from reduced annual maintenance and support and consulting support for custom configurations and enhancements	Requires one time funding to implement

PRE-PROJECT PLANNING LESSONS
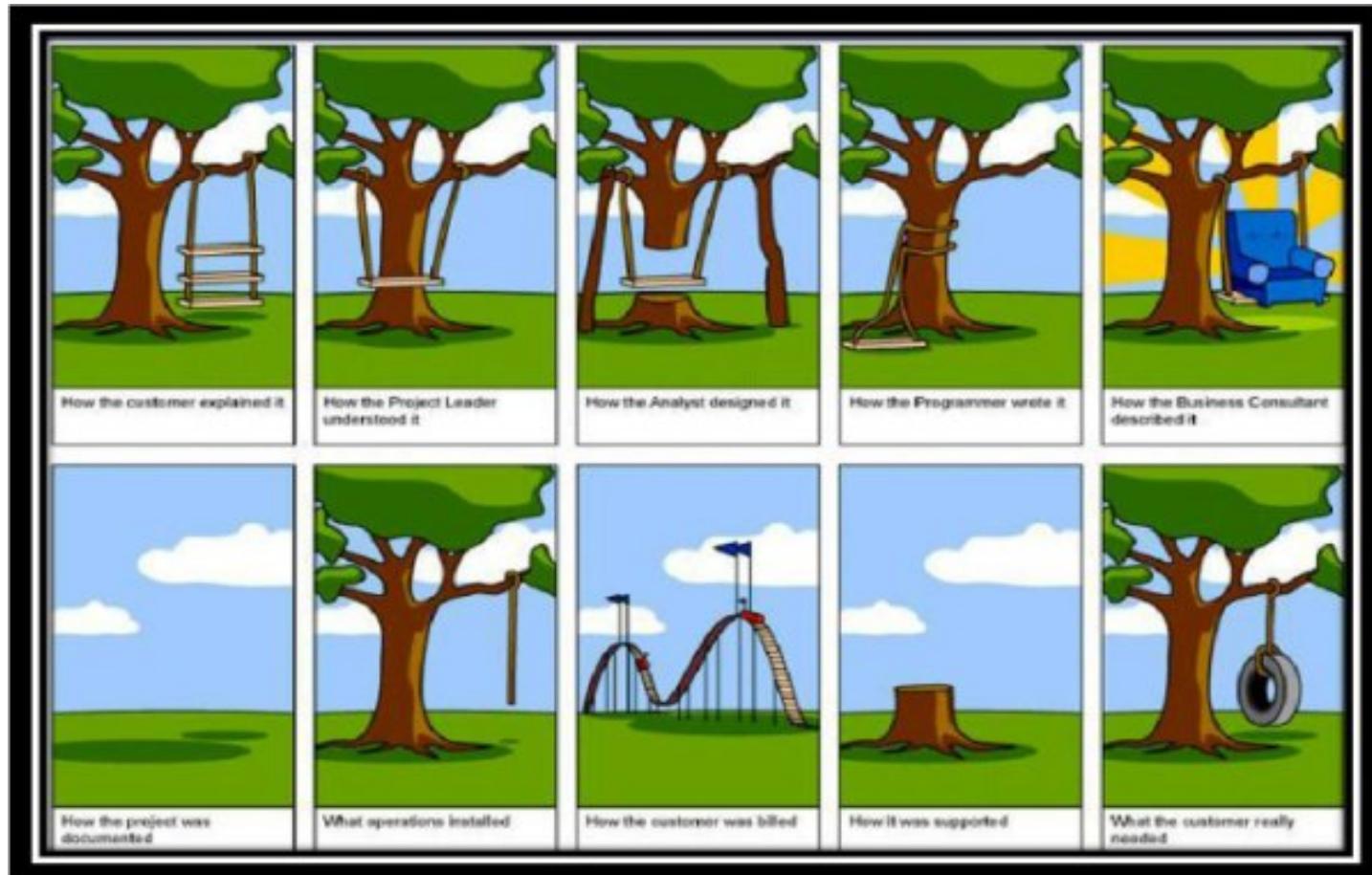
PRE-PROJECT PLANNING LESSONS

- Political climate always matters – understand how it will impact the project

- Engage users to provide all to capture all business requirements and needs

- Take the time to clarify – review – revise – clarify with key stakeholders
  - business need and drivers
  - success indicators and measures
  - post go live performance measures
  - stakeholders who will be involved

PROJECT START-UP

Activities

- Clarify business need and drivers and desired outcomes with stakeholders
- Review conceptual process flows with stakeholders
- Develop and Issue RFR
- Demos and vendor selection
- Issue SOW
- Form Project Advisory Group
- Verify timelines and resources
- Secure funding
- Project Kick-off

Tools & Templates

- High Level Timeline
- Project Information Form including Success Indicators & Measures
- Process Flow (conceptual)
- Request for Response (RFR)
- SOW
- Task Resource Schedule (TRS)

HIGH LEVEL TIMELINE

	FY 2014												FY 2015										
Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-1

Pre-Project Planning | **Project Start Up** | **Blueprint** | **Realization** | **Final Prep** | **Go-Live & Intensive Support** | **Post Go-Live Support & Stablization**

Pre-Project Planning Meeting 7/9/13

Project Kick-Off 11/1/13

GO-LIVE 10/1/14
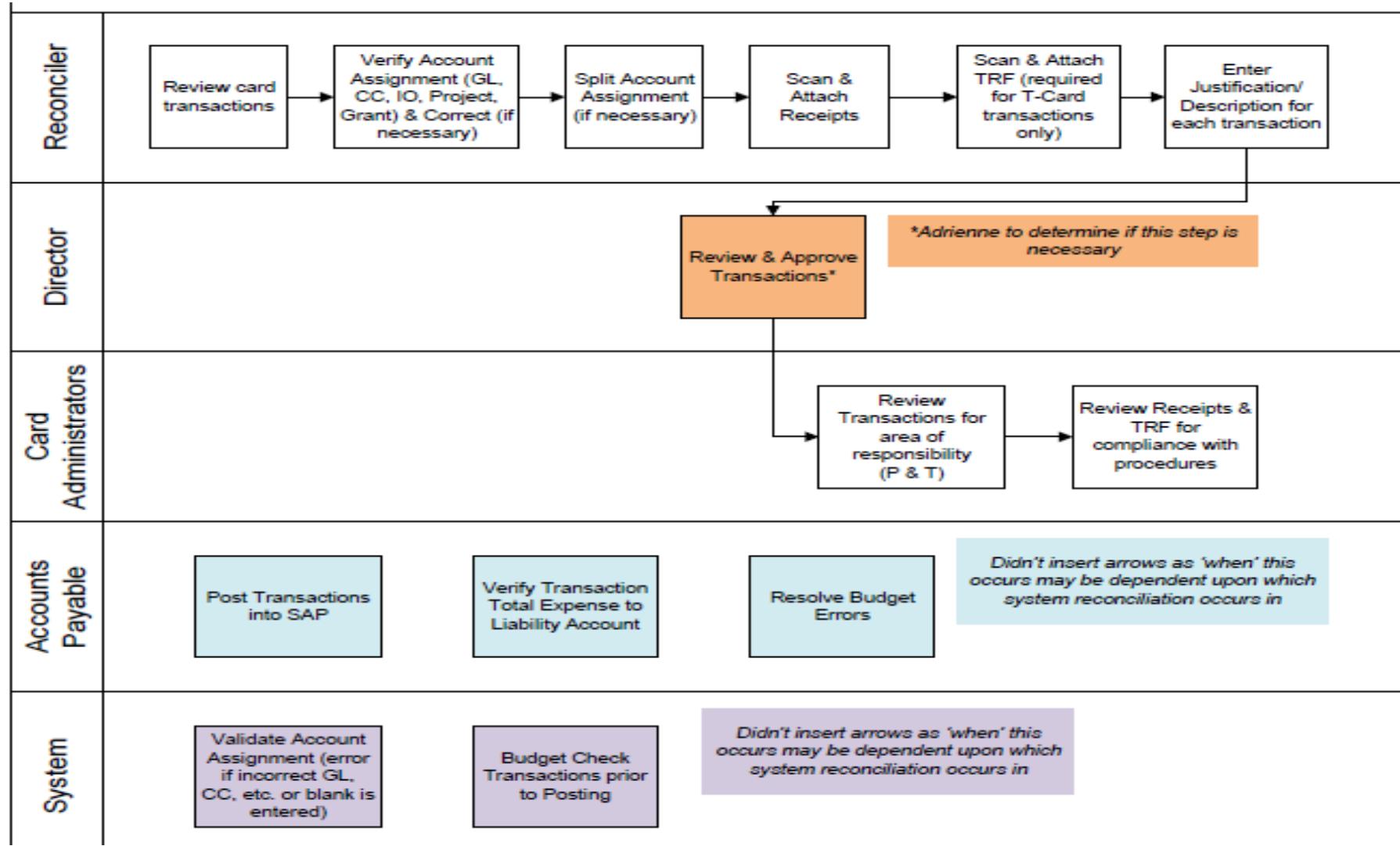
PROCESS FLOW - CONCEPTUAL

PROCESS FLOW - CONCEPTUAL

AP Automation Project
"FRONT END IMAGING"
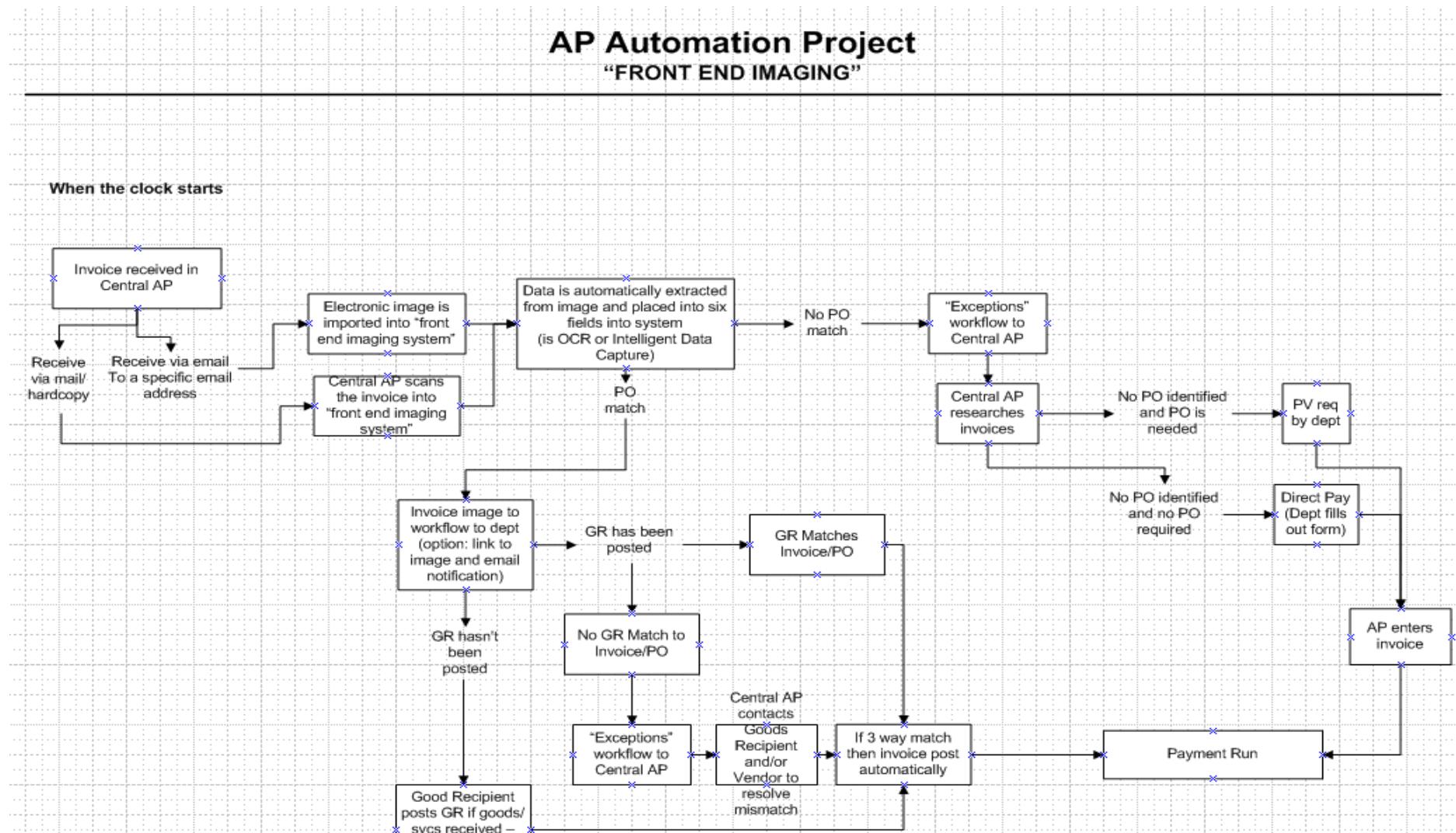
PROCESS FLOW - CONCEPTUAL

Task Resource Schedule (TRS)
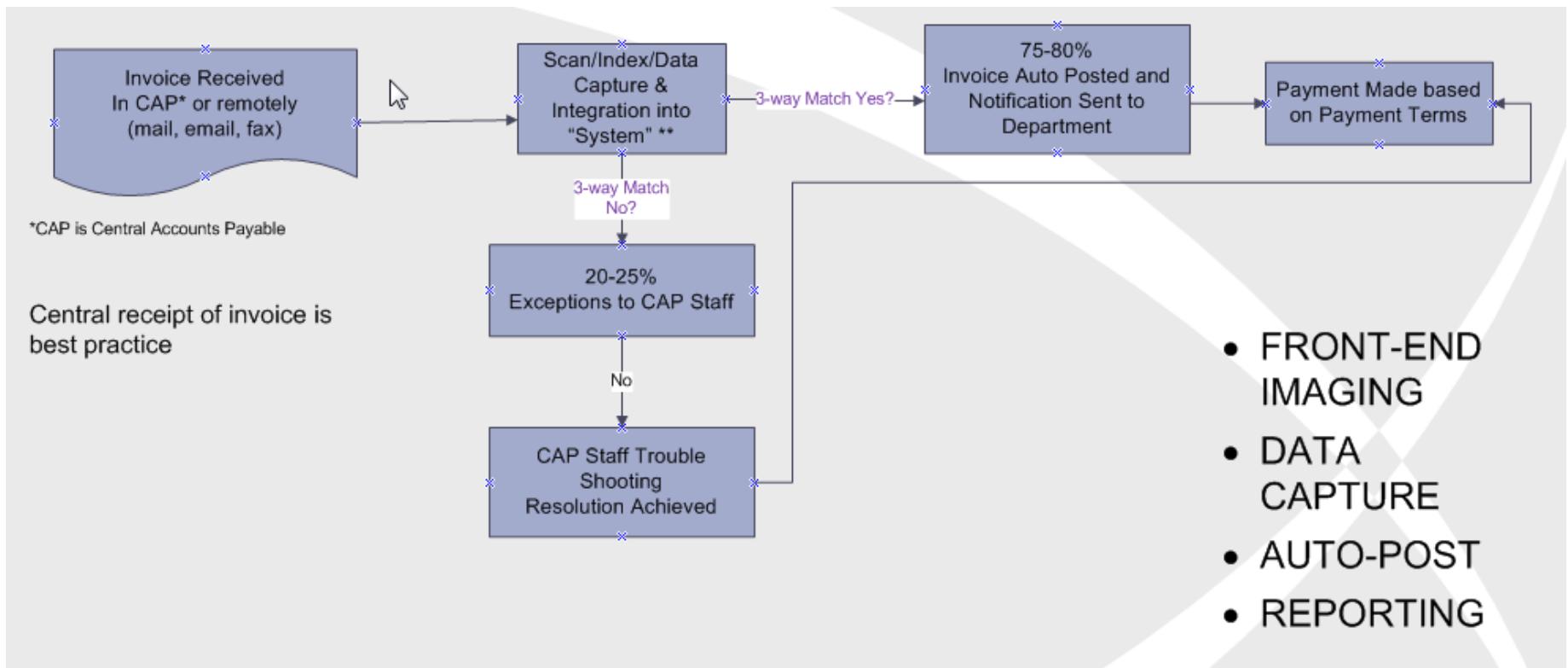
		Task Information				County Resources		BofA Resources			
Evolve™ Project Phase	Milestones/ Deliverables	Tasks and Sub Tasks	Projected Finish Date	Actual Start Date	Actual Finish Date	Owner(s)	Hours	Role/Skill Set	On Site Hours	Off Site Hours	Cost
Realization Part 1	Master Account Setup (2 Business days after submission)	Perform required action based on Payment Method	4/4/14	4/8/14		MM, AC					
		Determine whether reconciliation will be performed in SAP or Works	4/4/14	4/2/14	4/4/14						
Blueprint		Identify additional SAP requirements resulting from SAP demonstration	4/4/14	3/31/14	4/4/14						
Blueprint		Confirm dates for training internal users	4/4/14	4/2/14	4/4/14						
Blueprint		Confirm dates for training reconcilers	4/4/14	4/2/14	4/4/14						
		Develop Pro Con list/matrix of using Works v. SAP	4/4/14	4/1/14	4/4/14						
Blueprint		Schedule meeting with Records Retention to determine imaging requirements	4/4/14	4/1/14	4/4/14	ACA					
Blueprint		Develop functional specifications	4/4/14	4/1/14	4/8/14	MM, JB					
Realization Part 1		Download software	4/4/14			MG					
Blueprint		Confirm completion of ACH paperwork	4/4/14	4/2/14	4/29/14						
Realization Part 1	3rd Party Configuration Options (10 Business Days)	Submit flagging request	4/4/14					Suzanne			
Realization Part 2		Update steps in the reconciliation process	4/8/14	4/22/14	4/17/14	DO					
Realization Part 1	Prototype Configuration (https://demo.works.com/works)	Review Prototype - is this Work demo?? What is this task	4/8/14					Team			
Realization Part 1		Review Online Documentation link	4/8/14			JP, ST, DO, MM, JB					
Realization Part 1		System configuration - modify card master records, etc.	4/11/14			MM, JB					
Blueprint		Schedule meeting to discuss parked documents requirements	4/11/14	4/8/14	5/2/14	MZ					
Realization Part 1	3rd Party Configuration Options (10 Business Days)	Confirm File Feed received - what is this?	4/11/14			Bernalillo County					
Realization Part 1		Determine whether more information is needed from Bernco to BofA to complete the user and card information	4/15/14	4/8/14		SM					
Realization Part 2		Determine cut-off date for Wells Fargo cards	4/18/14	2/18/14	2/18/14	LSW					
Blueprint		Confirm whether map of MCC to G/L account is required	4/22/14	4/8/14	4/8/14	MM, JB, MZ					
Blueprint		Ensure alignment of processes to GFOA Purchasing Card Programs Best Practices (pp. 2 – 3)*	4/22/14	4/8/14		MZ, MM, JP, DO, ACA, ST					
		Confirm SAP training date(s) for reconcilers	4/22/14	4/22/14	4/22/14	MZ					
		Provide Advisory Group with trainer recommendations	4/29/14	4/22/14	4/29/14	ALL					
Realization Part 1		Confirm cardholder assessment dates	4/29/14	4/22/14	4/29/14	MZ					
Blueprint		Identify document-imaging requirements	4/30/14	4/30/14	4/30/14	ACA					
		Assign roles/MCC grouping to cardholders in Works	5/6/14			DO					
Final prep	Training (Live Training sessions	Complete online training sessions for	5/15/14			KR, MM					

GRC Access Remediation & Mitigation Control Progress Report- Phase II

Project Summary

The County went live with GRC Access Controls 10 in March 2013 (GRC Phase I) whereby the following major tasks were accomplished:

- Loaded Segregation of Duties (SOD) toolset
- Determined risk owners and assigned risk
- Tested mitigation functionality
- Ran risk analysis for Single Roles
- Composite Roles and Users

The County established the groundwork necessary for the Phase II remediation process. Services needed are implementation/development support to assist internal ERP security staff with a complete a Security Redesign as follows:

- Single Role Redesign
- Centralized Emergency Access (Firefighter Implementation)
- Integrate SRM (and other) clients into GRC Access Controls

Timeline

Phase II has functionality to help resolve ongoing security related audit concerns.

• Success Indicators and Performance Measures for this initiative have been established and the BBI Evolve Methodology will be utilized for this implementation.

Major Milestones

• ERP is utilizing the RFR (Request for Response) process to competitively bid this project to it's three consulting support vendors on contract. RFR timeline is detailed below:

- March 28th - RFR sent to vendors
- April 9th - RFR Questions to Bernalillo County
- April 11th - Bernalillo County Responses to RFR Questions – Summarized and sent to all Respondents
- April 23rd - Submittal of RFR to Bernalillo County
- Week of May 5th - 1st Round Candidates Phone Interviews
- May 20th - Award Date

BBI Evolve Requirements to Move from Pre-Project Planning to Project Start-Up

- ☑ Drafted success indicators and performance measures
- ☑ Project Summary
- ☑ Draft timeline
- ☐ Order of magnitude funding secured
- ☑ RFR issued on 2/28/14

ePayables Project Decision Action Report (PDAR)
4 12 14

ERP Project Implementation Phases

Pre-Project Planning → Project Start-Up → Blueprint → Realization – Part 1 → Realization – Part 2 → Final Prep → Go-Live & Intensive → Post Go Live Support & Stabilization

Project Decisions (Pending or Final)

Decisions will be made with consideration of the Success Indicators and Measures.

Decision	Status Pending or Final	Date Pending – date decision is needed Final – date decision was made
ePayables go live pushed back to accommodate scope	Final	3/12/14

Project Tasks In Progress Week of 3/10/14 through 3/15/14
Tasks that are behind schedule are in red

Task	Owner	Est Start	Act Start	Est Complete	Act Complete

Project Issues and Resolution

Issue	Steps to Resolve	Who, By When

PROJECT START-UP LESSONS

- Clarify expectations about resources, deliverables, level of effort, and timelines in the SOW
- Clarify assumptions about technical environments in the SOW
- Begin to manage the knowledge transfer – establish the expectations and the mechanism by which the client will receive the knowledge/solution/documentation –
  - Check in with ERP resources before approving invoice
- Establish expectations of stakeholder participation in system implementation as well as operational readiness
  - Need the system and the organization to go live at the same time

BLUEPRINT

Activities

- SI consultants on site
- Blueprint workshops to develop PDD
- Identify and categorize reporting needs: standard, custom, go live critical, post go live
- Ensure PDD aligns to success indicators and meets functional requirements
- Finalize/Freeze To Be processes per PDD sign off
- Adjust funding and timeline based on PDD; finalize phasing, sequencing, and scope

Tools & Templates

- Process Design Document (PDD)
- Process flows – system design
- Role based checklists per phase

ROLE BASED CHECKLISTS PER PHASE

SRM Blueprint – Business System Analyst (BSA)
11/18/13

OCM LLC

ERP Project Implementation Phases

Pre-Project Planning → Project Start-Up → Blueprint → Realization - Part 1 → Realization - Part 2 → Final Prep → Go-Live & Intensive → Post Go Live Support & Stabilization

Blueprint Tasks – BSA

Tasks	Status or NA	Notes/Comments
Ensure accuracy of the PDD to make sure the wording makes sense, it contains enough detail, participate in reviewing		
Participate in documenting the major processes, functional requirements, user roles, final timeline		
Participate in design sessions		
Provide users that need to be involved by looking at user roles in SAP		
Participate in development of materials for user outreach and engagement sessions to understand the implications of the design; show screen shots/examples as early as possible to help users understand;		
Post versions of PDD to SolMan		

PROCESS FLOW – ID GAPS AND ?'S

P & T Card Reconciliation Process – SAP

Updated 4/15/14

AP
- Log on to Works run report (what report?)
- Download Transaction File from Works as Excel
- Save Excel File to AP Shared Drive
- Run Procurement Card Load from Bank SAP t-code: ZWF_PCARD_BOFA
- Run Read Inbound File SAP t-code: CRF1 (name file: year, month)
- Run Edit Card File SAP t-code: CRF3 to Park Transaction (workflow starts)

Reconciler
- SAP Portal: Parked Documents appear in Universal Worklist (UWL)
- Open Transaction in UWL
- Click Fast Data Entry to Change Account Assignment Select Correct GL, CC, IO
- Fast Data Entry: Split Account Assignment (if necessary)
- Click on Line Item 1, Click on "More" for Grant & Project entry
- Click on Line Item 1 (Expense), Insert Justification in "Text" Field (50 characters)
- Click on Line Item 1 (Expense), Click on "Long Text" button, name long text (standardize name), select editor button, enter Detailed Justification (if necessary)
- Verify "P" or "T" Designation in Doc Header field
- Click on Post to Approve Transaction (end of Workflow) & Budget Check will occur

P-T Card Administrators

Director/EO

Questions for BofA:
1. When can BC download the last file of the month to make sure total of the monthly statement equals the total of all files for the month?

2. What Report needs to be run from Works to start the reconciliation process?

NEW FEATURES (THANKS JEANETTE!!) ☺:
If we map GL to MCC in Works, then the Recommended Default GL Account will be available in the Text Field

The default GL will default the "P" or "T" designation into the Doc Header Text (e.g. 55* GL account defaults "T")

Cannot post to default 541490 – will get system

Phase II:
1. Scan & Attach Receipts to Parked Document in SAP

2. P-T Card Administrators to

NEXT STEPS (P-T Reconciliation Sub-Group):
1. Create Swimlane Process Flow Chart for Justification Report Process

2. Create Swimlane Process Flow Chart for Works Card Administration (new card, change card, etc.)

BLUEPRINT LESSONS

- Determine what the users need to be prepared to discuss and/or decide in specific workshops
  - How deep will you allow users to go about decisions in blueprint meetings
- Before Blueprint! Clarify the expected level of detail needed/included in Blueprint – Process Design Document (PDD)
- Be prepared – don't have the clock ticking while you are getting prepared
- Listen to the users – you may be surprised at how they really do things

REALIZATION – Part 1

Activities

- Develop Configuration Documentation Catalog to the detail we are able to support the system with the included info
- Identify and plan Operational Readiness activities and timeline: policies, roles & resp, authority & approvals, equipment
- End to end business process swimlanes
- Develop go live critical reports

Tools & Templates

- Configuration Documentation Catalog: Technical tables and fields, Reporting specifications, Installation configuration, Functional configuration,
- Operational Readiness documentation
- Report Development Schedule (RDS)
- Process flows – full lifecycle business process/system utilization

REPORT DEVELOPMENT SCHEDULE (RDS)

REPORT DESCRIPTION/ REQUIREMENTS	Is there an existing report that has the information needed?	If existing report, then ERP assists with custom layout, screen variant	If no existing report or modification to existing report is needed, submit ERP Request Form	Meet with developer & BSA to clarify requirements	Review report with developer (dev or QA) to clarify changes needed	Report approved by requestor	Report moved into production	Train users how to run reports
SAP Reporting:								
Justification Report: -Need the P or T field included in the report - or ability to run report for just P or T transactions - need to separate so that two reports can be submitted for combined cards (1 for Purchasing; 1 for Travel) -Need Acct Assignments (Fund, GL, CC, IO, Project, Grant) -Description - Need this field with max characters shown in the report (non-truncated). 5/9 Update - Can we add a selection field for "Posted" and "Parked" documents - Drill down (Phase II) - Descriptions for Fund, CC, IO (Phase II)	Yes, there is a Justification Report, however it will require modifications as additional information is needed	N/A	4/21 Veronica to submit ERP Request Form requesting modifications to Justification Report - report mock up has been provided	5/9 - Demonstrated the ability to filter the report for "Purchasing" vs. "Travel" transactions. Can also run for both.	5/9 - New Request to add language to signature lines			
GL Account Report: Monitoring the posting to the Correct GL Account (e.g. Travel to 55* GL account) - 5/9 Update: Reconcilers will be responsible for ensuring correct account assignments; Purchasing will do spot audits for correct GL accounts; Darlene will review GLs when reviewing SAP Justification Report - then contact Reconcilers to do a Reclass to correct	5/9 - Various Transactions in SAP that can be used to view the Parked/Posted Transactions where GL Account can be reviewed.	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Department Reports: 5/9 Update: Depts will use the SAP Justification Report and Post the Transactions in the Portal - these will give them the same information they currently have in CCER/SAP. - Any other reports they need will be discussed clarified during the Communication sessions in late May.	Will ask departments during dept communication meetings (late May)							
Violation reports: Update 5/9: There are many violations that can occur: - track users that do not enter justification for reconciliation - Melissa needs to see access the Reconcilers have so that they can change Line Item Text (Justification) a Posted Document - incorrect acct assignment - dept to enter Reclass Violations Matrix will capture all violations for P & T transactions.	NO REPORT REQUIREMENTS FOR THIS ITEM: Update 5/9 -Will be tracked manually Darlene and Sharon as you audit the SAP Justification.	N/A	N/A	N/A	N/A	N/A	N/A	N/A

PROCESS FLOW – Full lifecycle
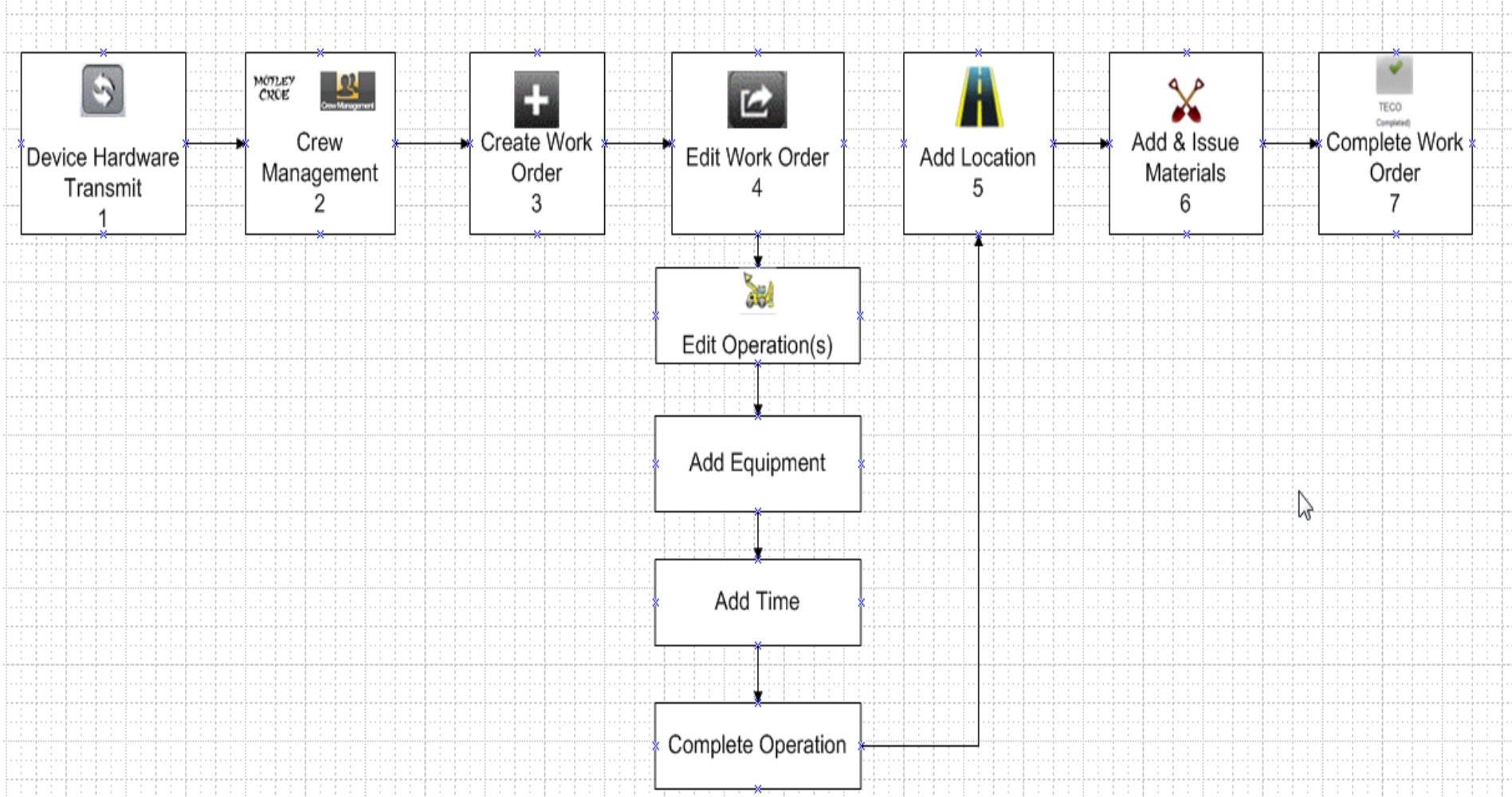
REALIZATION – Part 2

Activities

- Operational Readiness activities and timeline: policies, roles & resp, authority & approvals, equipment
- System configuration
- Unit testing/break fix
- Integration testing/break fix
- Report testing/break fix
- Update end to end business process swimlanes based on configuration (will use for training, work instructions, procedure development

Tools & Templates

- Sign off break fix from integration testing
- Unit testing tracked and prioritized
- Report testing tracked and prioritized
- Operational Readiness documentation
- Socialize major impacts to with key stakeholders
- Detailed Timelines for Training

TRAINING TIMELINE

4/29 Finalize Assessment

6/1 Finalize Guidelines

6/16/2014 Launch Assessment (Complete prior to getting card)

7/1 Go-Live

4/9 - 6/1 Work on Guidelines

6/1 Final Changes to Assessment Due to Kimberly

6/1 - 6/16 Email & Insider Communication for Cardholders & Directors

6/16 Guidelines Available to Users

4/11 - 4/23 Create Assessment Questions

5/1 - 5/15 Administrator Training - Works

5/15 - 5/30 Communication Session with Reconcilers

6/10 - 6/26 Reconciler Training

5/1/2014   6/1/2014   7/1/2014

Assessment for Cardholders
- Online assessments
  - P-Card
  - T-Card
  - Reconcilers
- Includes Cardholder Agreement
- Required to successfully complete prior to receiving a card

Administrator Training-Works
- Works online live webex training session for Administrators/Back-ups:
  - Sharon/Jolene
  - Darlene/Michael
  - Jennifer/Robert

Communication Sessions

Reconcilers	Session by Division
Cardholders	Emails Post on Insider
Directors	Directors Meeting/Email

Reconciler Training-SAP
- Reconciler and back-ups (~70)
- 10 sessions, 3 hours per session
- In-Process (Renita)
- Guidelines & Procedures (Sharon & Darlene)
- Work Instructions (Kimberly & Melissa)

Guidelines
- Combine P-Card into the Violations and Penalties Matrix Forms
  - Card Application
  - Special Exemptions

REALIZATION LESSONS

- Configuration Documentation Catalog needs to be comprehensive and detailed enough so that you can maintain the system on your own

- Do not do unit, integration, report, and user acceptance testing at the same time

- Allow time between testing and break fix

FINAL PREP

Activities

- Install, configure, test software on equipment
- UAT
- Break fix
- Prioritize and categorize go live critical issues
- Develop end to end process flows
- Develop work instructions
- Develop training materials
- Train the Trainer
- End user training
- Complete Operational Readiness – ensure users are ready to use the system following revised business processes
- Instructions and Materials for Help Desk

Tools & Templates

- Project Success Indicators and Measures
- Process flows - Training

PROCESS FLOW - REFINED

P & T Card Reconciliation Process – SAP

Updated 5/8/14

AP

1. Log on to Works pull scheduled P-T Card Load File & Save to AP Shared drive as .TXT file (name file: FY, period) **1**

2. Execute P-T Card Load program SAP t-code: ZWF_PCARD_BOFA **2**

3. Execute Read Inbound File SAP t-code: CRF1 (name file: FY, period) **3**

4. Execute Edit Card File SAP t-code: CRF3 to Park Transactions (workflow starts) **4**

Reconciler

- SAP Portal: Parked Documents appear in Universal Worklist (UWL)
- Open Transaction in UWL
- Click Fast Data Entry to Change Account Assignment Select Correct GL, CC, IO, WBS Project
- Click on Line Item 1, Click on "More" to enter Grant (if necessary)
- Fast Data Entry: Split Account Assignment (if necessary)
- Click on Line Item 1 (Expense), Insert Justification in "Text" Field after the Recommended GL e.g. GL 552101: Registration for Conference (40 characters after ":")
- Click on Line Item 1 (Expense), Click on "Long Text" button, name long text (standardize name), select editor button, enter Detailed Justification (if necessary)
- Verify "Purchasing" or "Travel" Designation in Doc Header field
- Click on Post to Approve Transaction (end of Workflow) & Budget Check will occur **5**

P-T Card Administrators

Director/EO

> Numbers correspond the numbered steps in the T-Acct Mapping document

---

BofA Works Reporting:

1. BC will download the P-T Upload File weekly (Mondays through prior week end) & at end of Billing Cycle (1 day after cycle end date – last day of month).

2. Run P-T Upload File at the end of month to make sure total of the monthly statement equals the total of all files for the month

---

NEW FEATURES (THANKS JEANETTE!!) ☺ :

If we map GL to MCC in Works, then the Recommended Default GL Account will be available in the Text Field

The default GL will default the "P" or "T" designation into the Doc Header Text (e.g. 55* GL account defaults "T")

Cannot post to default 541490 – will get system

Phase II:

1. Scan & Attach Receipts to Parked Document in SAP

2. P-T Card Administrators to approve documents in workflow

NEXT STEPS (P-T Reconciliation Sub-Group):

1. Create Swimlane Process Flow Chart for Justification Report Process

2. Create Swimlane Process Flow Chart for Works Card Administration (new card, change card, etc.)

3. AP Payment Process – Billing Cycle

4. Reconciliation of Parked Documents (clearing)

FINAL PREP LESSONS

- Manage configuration so you can freeze configuration to allow time for work instructions and training materials to be developed prior to end user training

- Keep list of post go live enhancements – identify and prioritize those,
  - Communicate what is and is not included in initial scope and what will be done in future phase

- Earn credibility by tracking and following-up on department utilization of the system and processes post go live

GO LIVE & INTENSIVE SUPPORT

Activities

- Range 3 – 8 weeks
- Conduct post go live labs in production
- Identify and fix bugs
- Work with users who are not using system as designed
- Design and develop non go live critical reports

Tools & Templates

- Project Success Indicators and Measures
- Post go live performance measures
- Project Information Form
- Report Development Schedule (RDS)

GO LIVE & INTENSIVE SUPPORT LESSONS

- Communicate, communicate, communicate
- Make sure users, managers, ERP implementation team, and Help Desk know what to do when a problem occurs or when a user needs help
- Hold user labs to help users complete their work while receiving immediate help

POST GO LIVE SUPPORT & STABILIZATION

Activities

- Patches, bug fixes
- Revise/update work instructions
- Work with departments to refine internal bus processes to better utilize system functionality and reporting
- Anchor new business processes by reviewing analytics and performance measures to id where support is needed

Tools & Templates

- Process flows – reinforce business process/system utilization
- Table top process/system walk thru
- Issue Clarification and Categorization
- Document department responsibilities moving forward: submit ERP request forms for functionality and reporting needs

POST GO LIVE SUPPORT & STABILIZATION LESSONS

ERP doesn't work! I can't get any info out of the system!

Let's take a look. Show me the data in ERP.

We're not using ERP. We're using a spreadsheet because we don't trust the system.

ISSUE CLARIFICATION & CATEGORIZATION

Mobile Asset Management – Post Go Live Support & Stabilization
Issue Clarification and Categorization with Next Steps

Issue and Implications - Summarize the issue and explain the implications
Category - System issue/enhancement/Master Data, Report development (will be tracked on RDS), Business process/training related
Short-term/Interim Solution -Explain the short term/interim solution or work around that will be followed. Explain if solution is already available or if it needs to be determined, Include the owner in ( )
Long-term Solution - Explain the long-term solution or work around that will be developed, Include the owner in ( )

ERP Project Implementation Phases

| Pre-Project Planning | Project Start-Up | Blueprint | Realization - Part 1 | Realization - Part 2 | Final Prep | Go-Live & Intensive | Post Go Live Support & Stabilization |

Item Number	Issue and Implications	Category	Short-term/Interim Solution or Work Around (owner)	Long –term Solution (owner)
1	On Transfer, work center (Mn.wk.ctr and Wk.ct) is not changed on the work order header and operation. Only Planner group is changed	System issue/enhancement/Master Data	Transferring work orders – in order for the transferred work order to disappear from the original supervisor's device, it must be started and then select the work center to transfer to and then transfer.	This is a bug , once work order transferred and planner group is changed Mn.wk.ctr and Wctr should be changed on transmit to match planner group work center
2	On WO Create Work center is not changed to the appropriate one	System issue/enhancement/Master Data	On Create-change work center on work order header to the correct one on mobile device and/or SAP PM	This is a bug , once work order transferred and planner group is changed Mn.wk.ctr and Wctr should be changed on transmit to match planner group work center
3	Functional Locations o Yards o Bike Trails o Facilities, community centers o fire departments	System issue/enhancement/Master Data	ERP team will create Functional Locations in SAP only and assign Functional Location ID using GIS Data Source	GIS Group should be responsible for creation of the data and ERP should just upload changes to SAP (Refer to SAP to GIS Process Flow Chart)
4	Can only transmit 9 FLs at a time . Find out where limitation is set and remove if feasible.	System issue/enhancement/Master Data	Will explore solutions under new consulting contract	GIS Integration from mobile device would be the optimal long term solution.
5	Roads Functional Location to be corrected from GIS source	System issue/enhancement/Master Data	ERP team will compare Functional Locations from GIS Data Source and correct issues in SAP.	GIS Integration from mobile device and data in both systems needs be updated regularly to capture all changes, etc.

PROCESS FLOW – Reinforce business process/system utilization

Invoice Process Flow
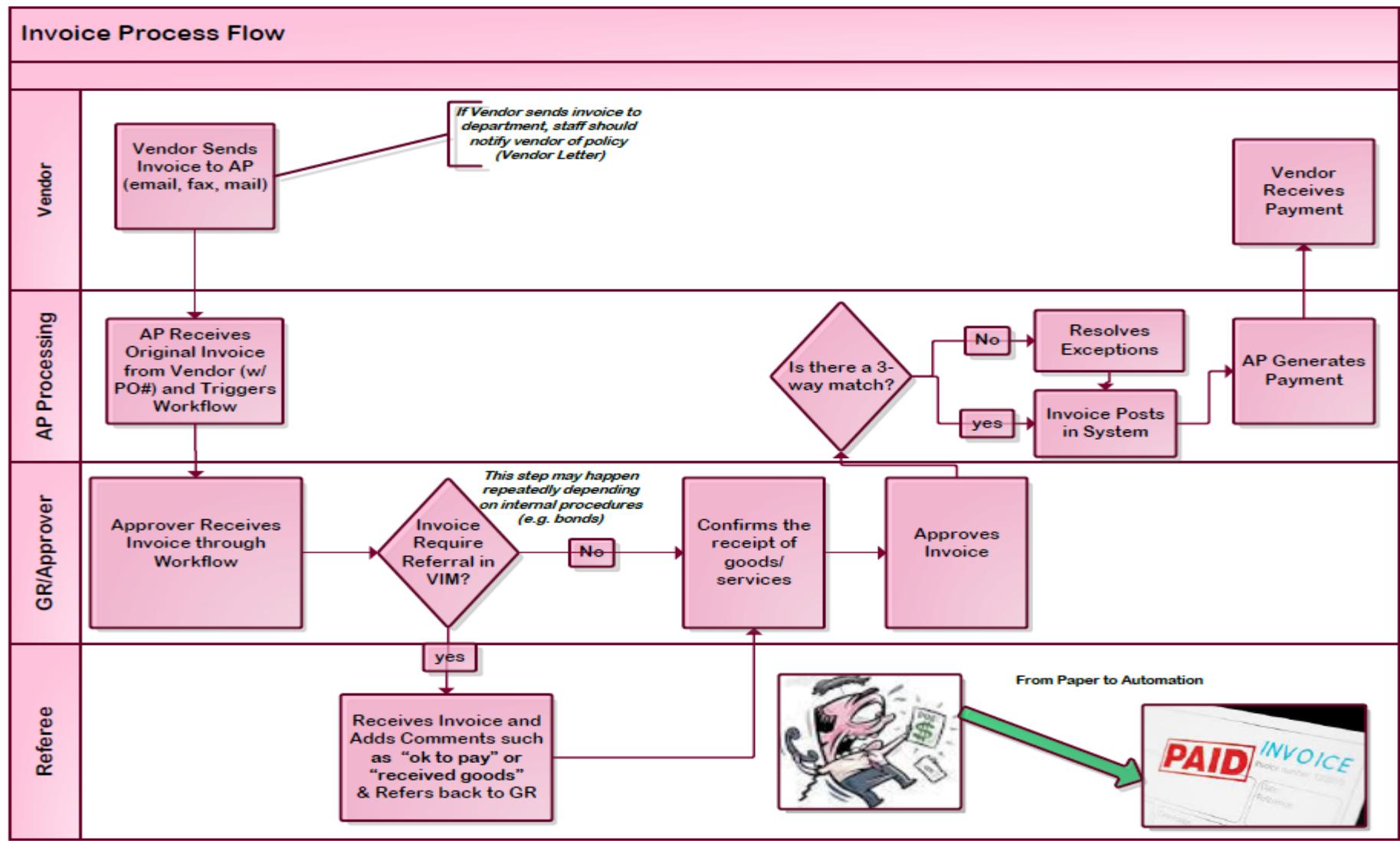
POST GO LIVE SUPPORT & STABILIZATION LESSONS

- Begin to address the post go live enhancement – determine priority, phasing, timeline with key stakeholders
- Follow up with individual departments that are having trouble using the system and/or following business processes
  - Conduct tabletop demos with users demonstrating how they use the system
  - Swimlanes developed with users to reinforce how the system and business work together
- Categorize user needs and address with appropriate action
  - System not working as intended/designed
  - Users not following business processes
  - Users are not able to follow business processes

PROJECT MANAGEMENT TRIANGLE

"This isn't the triple constraint I learned."

PROJECT MANAGEMENT – You can only pick two…
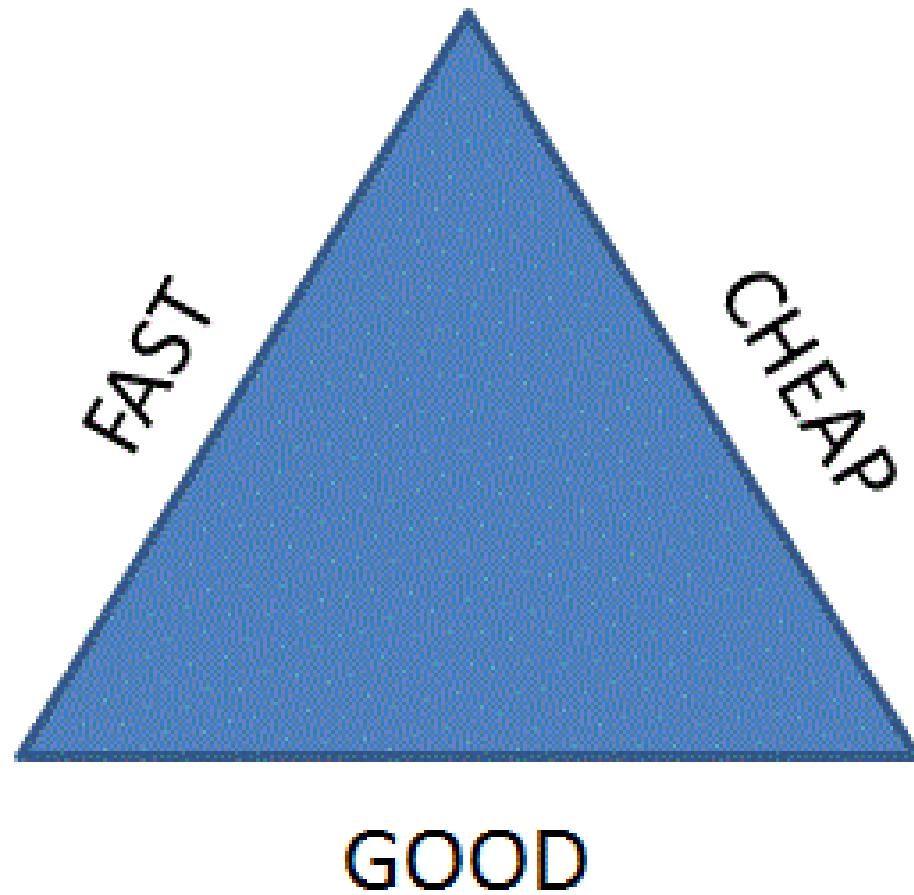
CONTACT INFORMATION

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505-730-1222

Essential Project Management Skills for "Non-Project Managers"

Presenters:

- **Dawn Lang, Management Services Director, City of Chandler, Arizona**

QR Code

Date: Monday May 19, 2014
3:30 pm - 5:10 pm

City of Chandler, Arizona

Metropolitan Phoenix Map
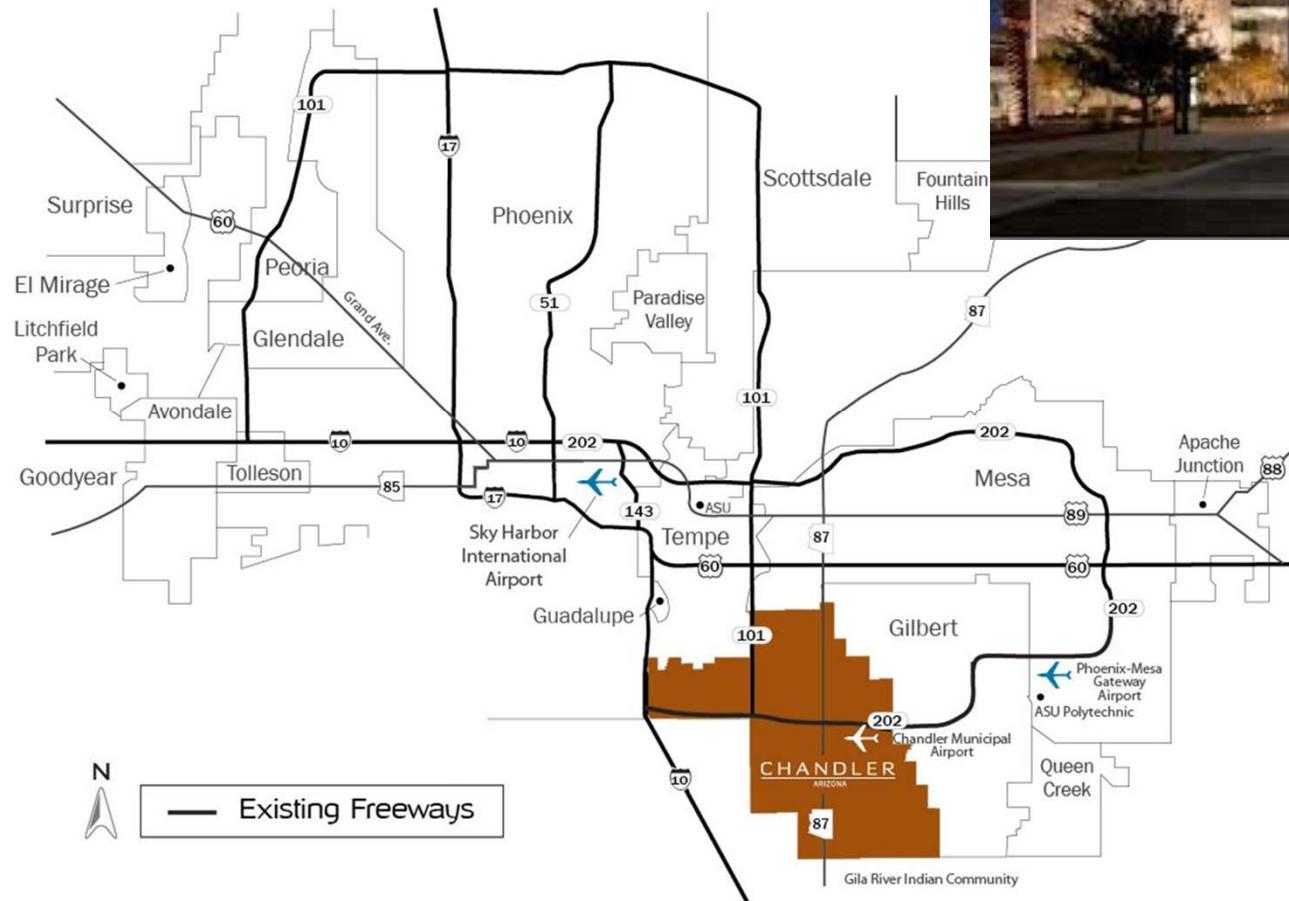
Innovation & Technology Hub of the Southwest

Overview

- o Organization's Projects and Management

- o Project Management Challenges

- o Functional Manager's 5 Key Skills

- o Change Management & Communication

- o Case Study

- o Lesson's Learned

- o In Summary

Organization's Projects & Management

o A **Project** is a <u>Temporary</u> Endeavor Undertaken to Create a <u>Unique</u> Product, Service or Result

- **Critical to Implementing Change in Organizations**

o Functional Managers

- Resolves Day to Day Issues
- Ensures Resources are Sufficient to Keep Goal Aligned with Organizations Overall Strategy & Vision
- Typically No Formal Training and We Find Ourselves "Managing a Project"
- Best Person to Keep Project "Business Focused"
  - Need Basic Project Management Knowledge

Project Management Challenges

- A **Project Manager** is the Person Assigned to Achieve the Project Objectives...**In Most Cases YOU**
  - A role, not Necessarily a job
  - As Functional Project Manager (PM)
    - May Lack PM Techniques & Understanding PM Lingo

- Why are Projects Challenging?
  - Unique - Something New - No Blue Print
  - Sometimes Difficult to Define When it Ends
  - Working with People ☺ (under pressure) ☹
  - Too Much to do, Too Little Time
  - As Soon as You Start, Something Changes

Project Timeline

Often Difficult to Define Timeline, but Important to Plan, Assess Risk & Work Towards a Defined Go-Live Goal

Projects Can Go Well and Stay Within Budget or
   Not so Well and Cost More in Resources, Time and Money

TRIPLE CONSTRAINT
Change in one Side MUST Affect Another Side (or Both)

Scope

Cost

Quality?

Schedule
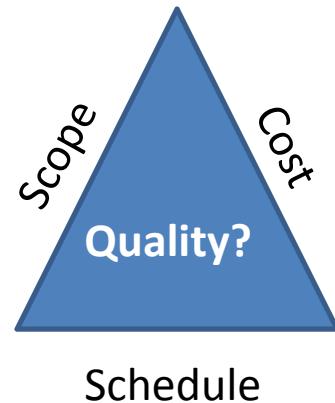
Functional Manager's 5 Key Skills

- Articulating the Customer Need & Business Case
  - Help Educate the 'Whys' and Communicate Objectives
- Creating & Cultivating Relationships *(Balancing Act)*
  - Team Must Have Strong Relationships to be Successful
  - Trust Vendor, but Challenge; Addressing Needs Immediately
- Staying Focused on Project Deliverables
  - Hold Accountable and Understand Scope
- Understanding Your Key Dependencies
- Being Proactive About Project Risk

Why is Change Management and Communication Important?

Ensure Good Balance Between Needs and Competency

Individual begins to question:

- The new situation
- Ability to maintain control
- Personal competence – can I do it?
- New skills required by the change
- Time and energy available to make the change

Change Threatens Equilibrium of the Environment

Quantifying Change Management

Awareness Building	Defining	Communicating	Implementing	Monitoring

• Technology Awareness
• Overall Project Awareness
  • Governance
  • Process
  • Decision Criteria
	• Needs Assessment
	• Specification Development
	• Identify Current Process Issues and Opportunities for Improvement
	• Solution Design
	• Process Redesign
	• "Super Users"/ Module Leads
		• Progress Updates
		  • Council
		  • Executives
		  • Management
		  • Staff
		  • Public
		• Policy/Process Changes
		• Organizational Change
		• Technology Changes
			• Redesigned Processes
			  • Policy change
			  • Process change
			  • Organiza-tional Change
			• Technology Skill development
			• Testing (UAT)
			• User Training
			• Metrics
				• Performance Metrics
				• Policy Enforcement
				• Coaching/ Mentoring
				• Additional Training
				• Perpetuating Change

Importance of Project Relationships

"If it wasn't for people, Project Management **would be** a lot easier!"

I might also add "If it wasn't for people, Project's **would not** get completed"

o Projects Create a Role Being Perfomed in Addition to a Persons Regular Job

o Projects Bring People Together for a Brief Period

Technical Team & Functional Team

Team Members

Govt. Entity & Vendor

IT & Implementing Department

Vendor PM & Internal PM

Implementing Department & Stakeholders

Executive Steering Committee & PM Team
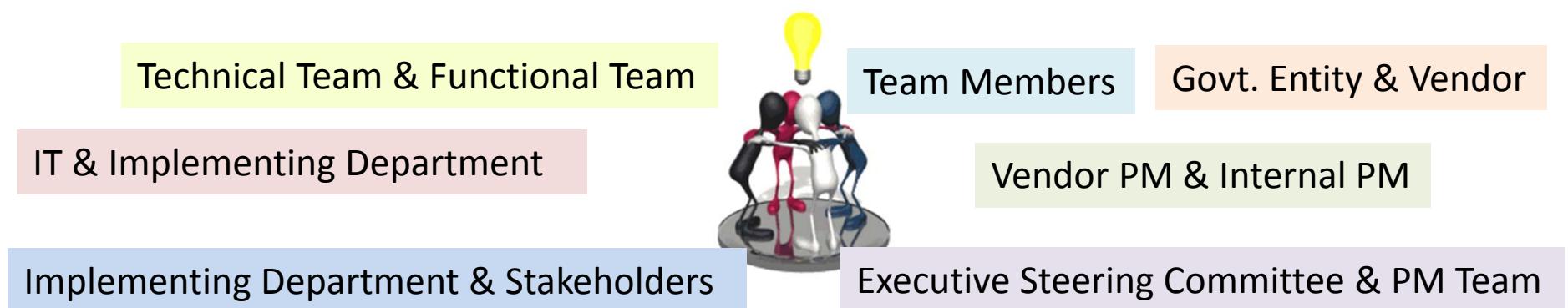
About "The Project"

Upgrade of Oracle ERP System from 11i to R12

Upgrade Existing Modules	New Modules	Training
• Financials • Payroll/Human Resources • Purchasing • Inventory	• iExpense • iProcurement	• User Productivity Kit (UPK)

- o Change to Chart of Accounts
- o Reporting Study
- o Change Management and Communication

Planning and Implementation
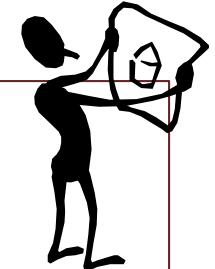
- ○ Oracle Assessment
  - Input from Users in Beginning
  - Create RFP & Scope
- ○ ITOC
  - Gained Citywide Support
  - Established Final Scope & Budget
- ○ Council Approval

- ○ Project Kickoff
  - Project Team & Roles
  - Project Scope
  - Project Objectives & Outcomes
  - Project Timeline
  - Stakeholder Involvement

- ○ Project Approach
  - Planning & Risk Assessment (20%)
  - Discovery
  - Fit/Gap
  - Configuration & Development
  - Test, Test & Test, then Validate
  - Change Management, Communication & Training
  - Go Live
  - Post Production Support

Project Team

o Clearly Define Project Teams and Expectations
o Teams Included

- Implementation Vendor Team
- Executive Steering Committee
- Outside Project Manager for the City
- Management Services Functional Team
    - Leads, Secondaries, Subject Matter Experts (SME), Key Contributor s
- IT Technical/Developer Team
- Communications and Change Management Team
- Training Team

Total Team Count: Internal 97 & External 14

Only the CORE team (36) Attended Weekly Meetings

Case Study

Project Organizational Chart

Executive Steering Committee

Status Updates to Various Committees (ITOC, Oracle Tech Team, OSC)

Project Sponsor

City Project Manager

CedarCrestone Project Manager

City Functional Teams

City Technical Team

CedarCrestone Functional Team

CedarCrestone Technical Team

City Training Team

City Communication and Change Management Team

CedarCrestone Change Management Team

Project Objectives & Outcomes

Upgrade Existing Applications

- Implement new functionality
- Implement underutilized existing functionality
- Resolve current issues and pain points
- Reduce customizations

Increase Footprint

- Add new modules
- Add tool for training documentation

Reporting Study and New Reports

- Resolve current issues and pain points

User Acceptance

Case Study
Project Timeline

City of Chandler R12 Upgrade								
March	April	May	June	July	August	September	October	November

Discovery

◆ Project Kickoff

Design (Fit/Gap)

Configure & Develop

Test & Train

Go-Live

Support & Post Production
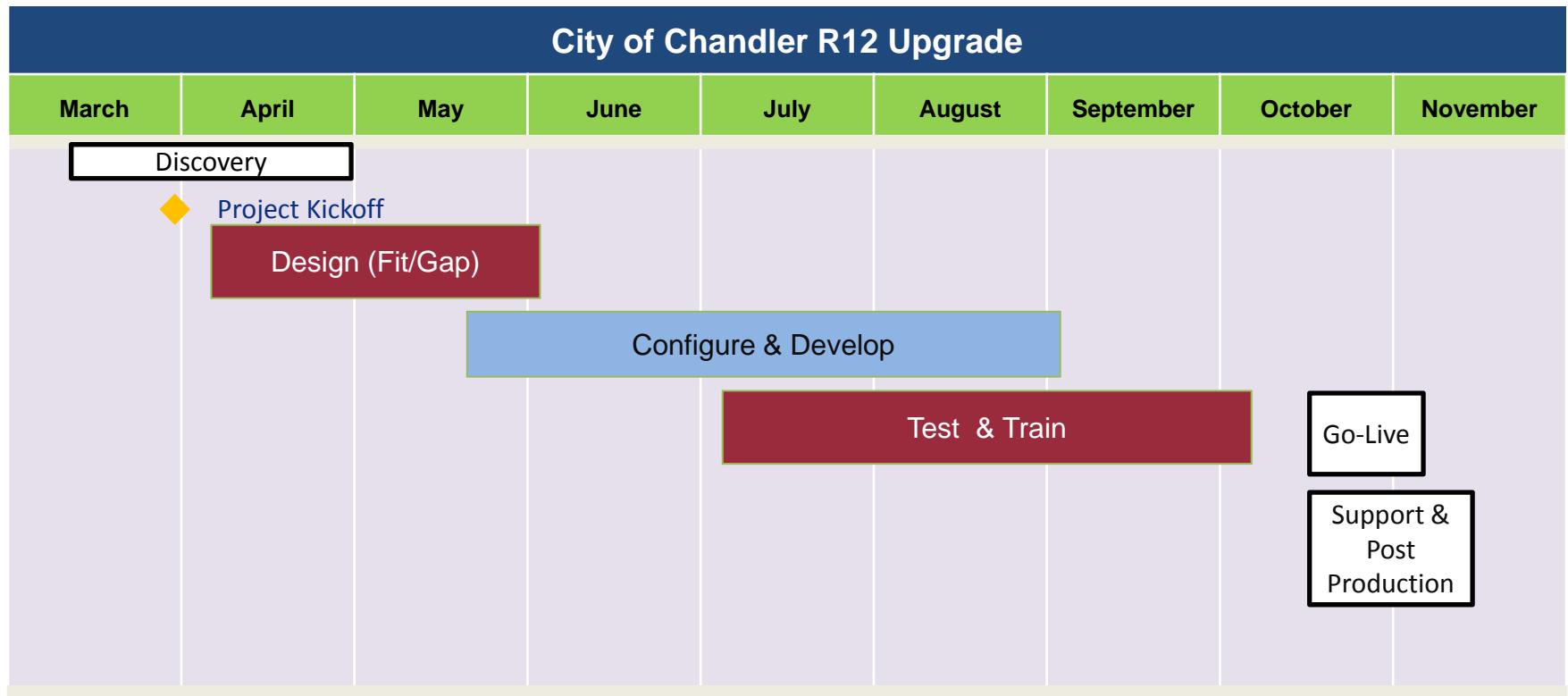
Monday, October 17ᵗʰ 2011 Go-live

Stakeholder Involvement

- o Active Participation Throughout the Project

- o Participation in Discover and Fit-Gap Activities

- o Regular Communications Via the Intranet, SharePoint Site, Website, Email, Meetings....

- o Training, Training, Training
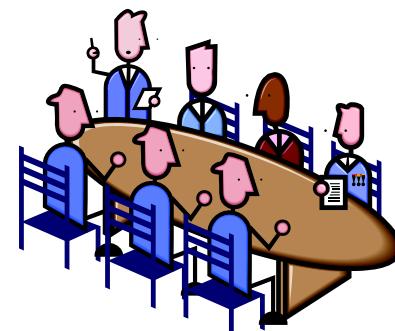
Project Branding

Case Study
Oracle R12 Website

chanweb.
TEAM CHANDLER'S HOME PAGE

management.
MANAGEMENT SERVICES

Home | Departments ▾ | Divisions ▾ | News and Info ▾ | Contact Info & Committees ▾ | Rules, Forms & Docs ▾

Home : Departments : Management Services   Welcome: **DawnL**

Chandler Oracle R12 Upgrade Project
Refining Operations ♦ *Resolving Obstacles* ♦ *Recognizing Opportunities*

Home

Scope

Timeline

Benefits

Q & A

Glossary

Team

Training

Oracle. Everyone in the City of Chandler organization uses it at some point, in one way or another. Our success, in many ways, is dependent on our ability to effectively utilize the Oracle system. Oracle R12 is an upgrade from the existing Oracle 11i application, and it will also include the deployment of three new applications affecting the Financial, Human Resources and Payroll systems.

Over the years – from the initial Oracle implementation and through various upgrades – the City has not always taken full advantage of the many features and functions available through the system. This time, we have committed the financial and personnel resources necessary to make this upgrade process more efficient, productive and successful. Our goal is to make the transition as smooth as possible by keeping employees well-informed of the project scope, anticipated benefits, possible impacts and current status.

On this website you will find valuable information about this important project, including the Oracle R12 Upgrade Project Feedback Form to share your questions, concerns, suggestions, and general comments with the project team. Please visit this website often for project updates and news you can use.

ORACLE UPGRADE PROJECT VISION STATEMENT:
The City of Chandler Oracle R12 Upgrade Project will provide the organization with an integrated Enterprise system that will support City staff in the delivery of government services and activities, take advantage of best practices, and improve the efficiency and effectiveness of City's business and customer service processes.

QUESTIONS?
Use the Oracle R12 Upgrade Project Feedback Form to share your questions, concerns, suggestions, and general comments with the project team.

PROJECT UPDATES

- Reporting Study underway as part of the Oracle R12 Upgrade project
  The Reporting Study is part of the Oracle system upgrade defining the reporting needs of the user community. This effort consists of studying users reporting

Oracle R12 New Functionality Communication Docs

Chandler Oracle R12 Upgrade Project
Refining Operations ✦ *Resolving Obstacles* ✦ *Recognizing Opportunities*

iProcurement Overview

SUMMARY OF BENEFITS:

- Ability to see your most recent requisitions, the status and the PO number all in one screen;
- Only three Item Types (formerly Line Types) to choose from;
- Only 170+ category codes to choose from (formerly 8,000+);
- Automatic routing to I.T. for approval after cost center approval;
- See requisitions that you have not "touched".

Oracle iProcurement is used to requisition goods and services by means of a requisition. Oracle iProcurement shares the requisition tables with Oracle Purchasing, and supports receiving functions. Oracle iProcurement is used as a web interface to Oracle Purchasing to allow employees to procure goods and services by means of a Requisition and ultimately be turned into either a Purchase Order in Oracle Purchasing or a Sales Order in Oracle Order Management. Oracle iProcurement also provides receiving and change order functionality, along with status updates throughout the procurement cycle.

Lessons Learned
Avoid Common Project Pitfalls

- Set Realistic Timeline
  - Build in "Cushion" for "What Ifs"
  - Identify Post Go-Live Items (non-critical)
- Access Risk Appropriately
  - Have Backup Plan for "What Ifs"
- Size Teams Based on Level of Effort
  - Provide Backup for Daily Operations
- Assess Team Skills Appropriately
  - Bring in Assistance Where Needed
- Avoid Mimicking Old System too Much
  - Be Open to New Processes and Improvements
- Don't Assume
  - Communicate Daily, Weekly, Monthly, Quarterly........
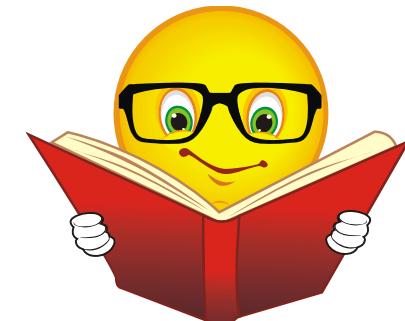
In Summary

- o Expect that You will Need to Manage a Project at Some Point in Your Career
- o Do Not Underestimate Communication & Change Management
- o Effectively Maintain Project Relationships
- o Monitor Risks and be Proactive
- o Celebrate a Successful Go-Live ☺

YAHOO!

Continue to Monitor
Areas of Communication & Training

Thank you

Questions?

Dawn Lang
Management Services Director
Chandler Arizona
dawn.lang@chandleraz.gov

Essential Project Management Skills for Non-Project Managers

Presenters:

QR Code

Abe Meer, PgMP, PMP
ERP Program Manager

Date:

Passions

- ✓ Consulting
- ✓ Training
- ✓ Coaching

- ✓ Nature Travel
- ✓ Speaking
- ✓ Thinking

Management Consultant, Trainer & Speaker

✓ 30 years Consulting: **ERP, Management, Information Technology**

✓ 15+ years Training: **ERP, Management, Information Technology**
Provides Training for Project Management Institutes Certification Exam Prep Courses

✓ Certifications: **PgMP, PMP, PMI-RMP, ASAP, ITIL v3 Foundation**

✓ Speaker & Author: **National & Global Management Conferences**

✓ Present: **Program Manager,**
$50+ Million, 5 Entities, 12 Project Managers, 120+ total Team members

VeeZari, Inc.   **Abe.Meer@VeeZari.Com**   **+1-240-381-1984**

Current Realities

- It is not enough to be a *Technical Expert* anymore

- Managerial effectiveness has become a necessary survival skill

- Project Management has evolved into a *Discipline* now!

- Increased need to learn Project Management in a Hurry!

Purpose of Presentation

o **Review Fundamentals to become a _Good_ Project Manager – _Real Fast!_**

o **Discuss How to become an AWESOME Project Manager**

Let's Review Fundamentals

Key Project Management Phases

Initiating
- Project Business Case
- Executive Committee Approval
- Appointment of Sponsor/Manager

Planning
- Project Initiation Document
- Communications Plan
- Exec Comm Approval

Controlling
- Risk Management
- Variance Reporting
- Communication

Executing
- Project Team Appointed
- Managing the tasks
- Project Status Reports

Closing
- Stakeholder Acceptance
- Close Out Report
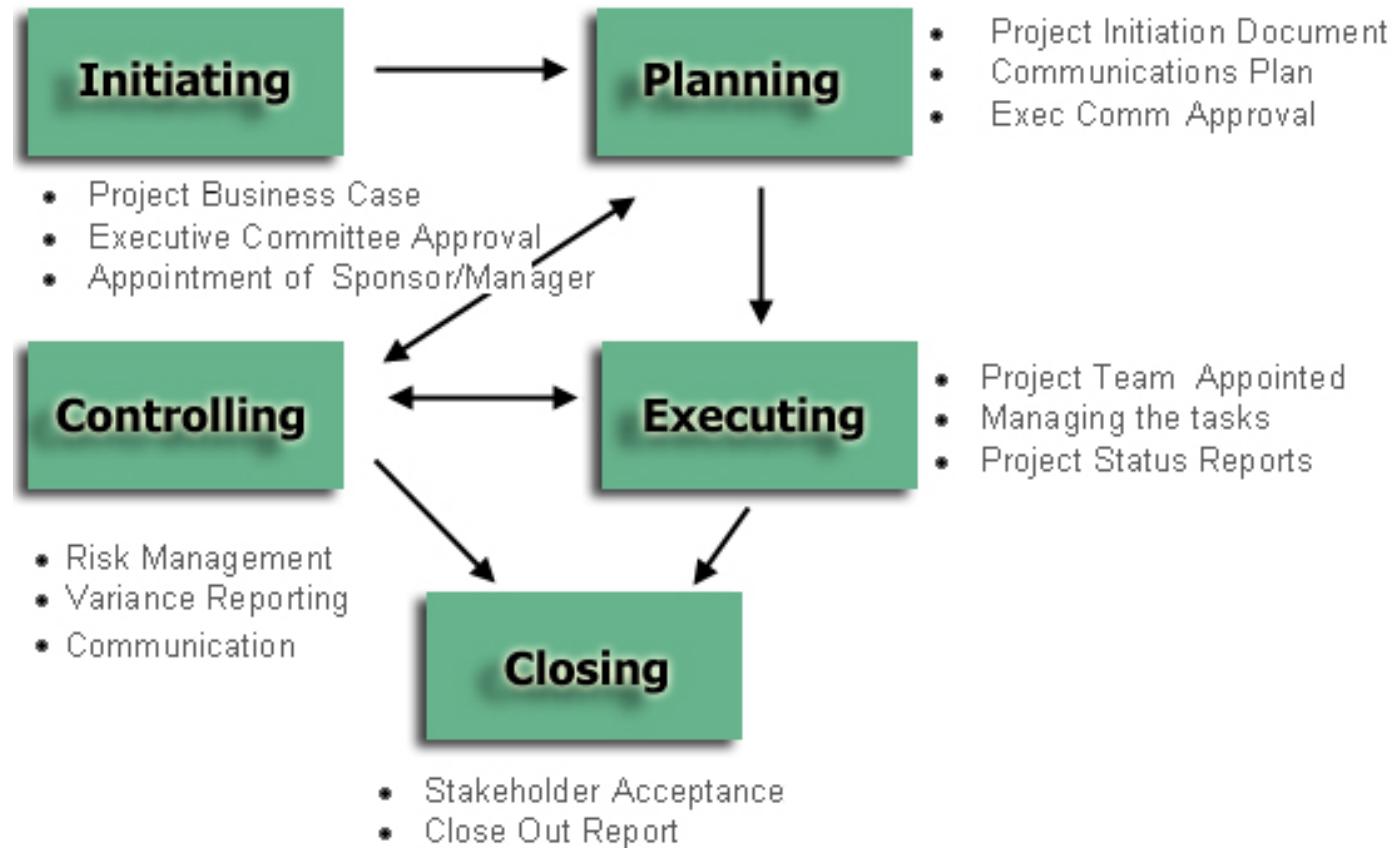
**Performing these tasks and
Developing these documents is essential**

An Example: Project Initiation Document

What?

#1
Project
Charter

Key Focus Areas of Project Management

How to become a Good Project Manager

Who?

Governing Board

Customers

Team(s) & Team Members

Other Stakeholders

#2

People

1. Who are the Bosses?: Resources, Decisions
2. Who are we Targeting to Deliver
3. Who is Doing the Work?
4. Who else is Interested in this Project?
5. Who else can impact this Project?
6. How do we organize them engage them?

Key Focus Areas of Project Management

How to become a Good Project Manager

How?

Project Management Plan
…and Sub-Management Plans

#3

Project

Management

Plan

1. **Project Approach – Methodology, Tools & Structure**
2. **Scope – Phases, Functionality definition, Scope Control**
3. **Schedule – Milestones, Deliverables**
4. **Change – Stakeholder Analysis, Engagement**
5. **Communications – Type, Format, Frequency, Distribution**
6. **Cost – Measuring, Reporting, Controlling**
7. **Quality – Assurance, Monitoring, Acceptance**
8. **Risk – Register, Mitigation Plan, Monitoring, Controlling**
9. **Staffing – Skills, Timing, Performance**

Key Focus Areas of Project Management

4 – Four Pillars of Project Management
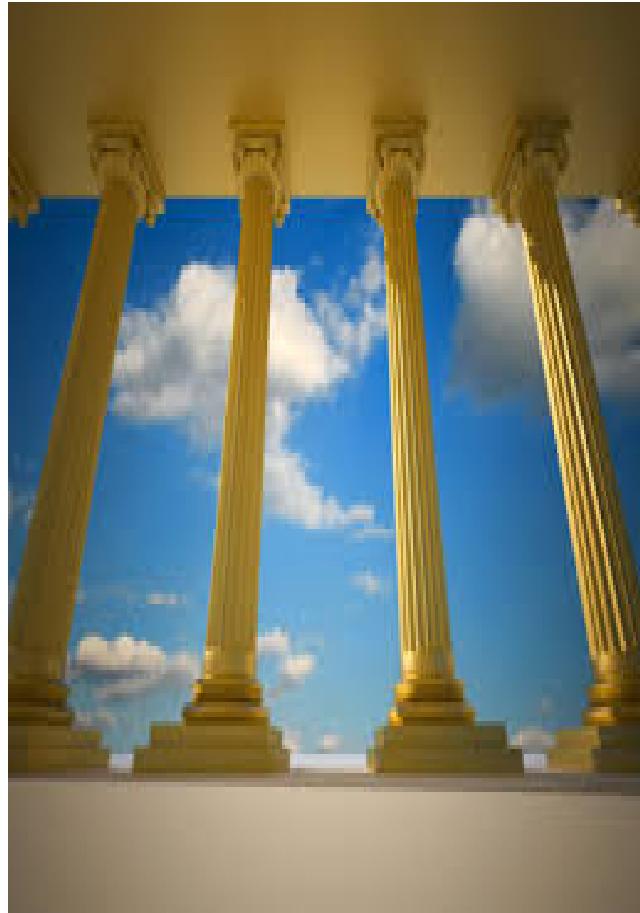
Project Management Foundation

5 Keys to Project Management Success

1. **Governance**
2. **Resource Engagement**
3. **Communications Management**
4. **Change Management**
5. **Risk & Issue Management**

If we don't manage them…they will manage us!

There are 5 Steps...to become an AWESOME Project Manager

Are you ready to begin the Journey?
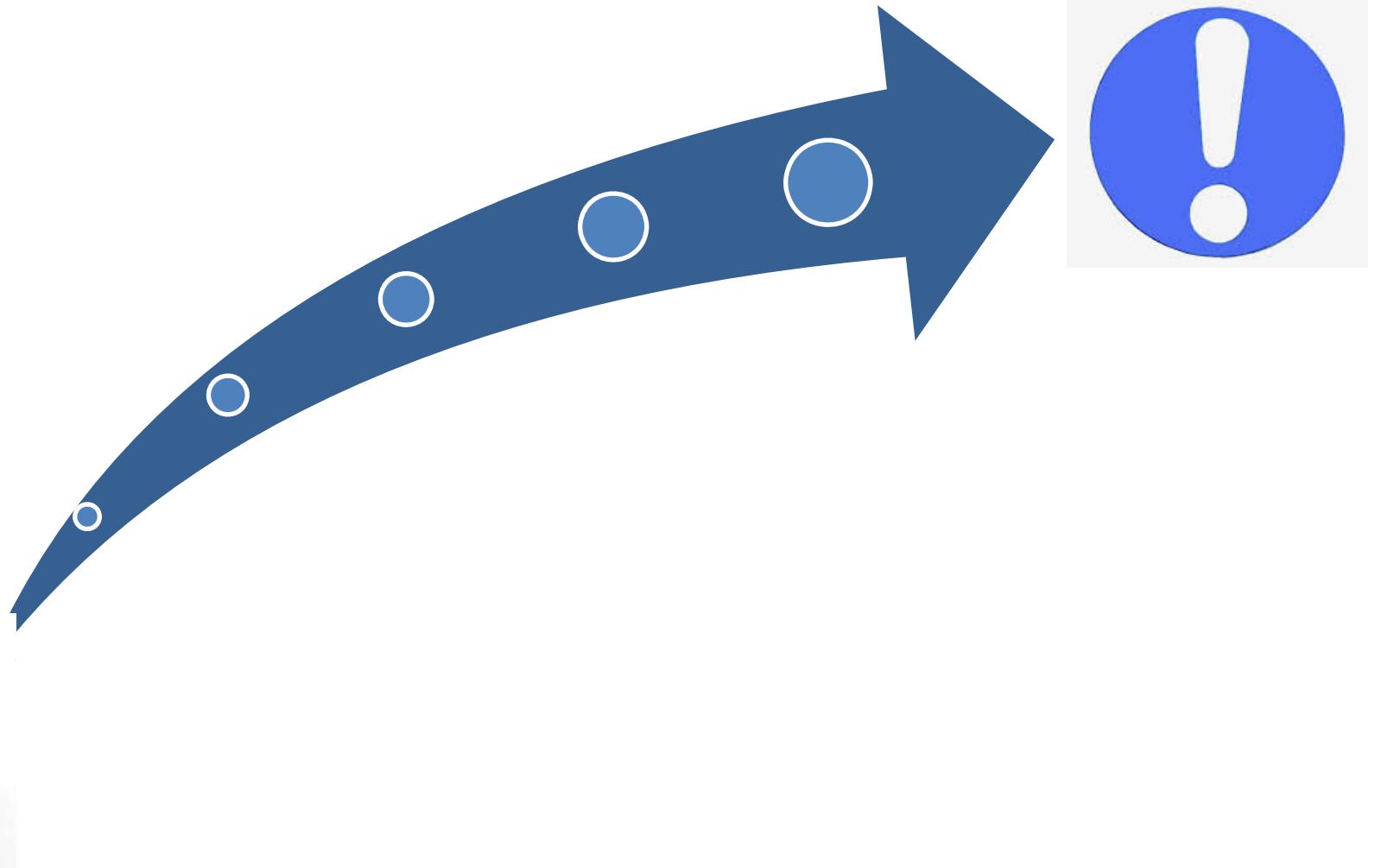
Five (5) A's to transform: From a *Good PM* to an *AWESOME PM*

Abe's Five A's to Become an Awesome PM

Aim

Acquire

Associate

Act

Accelerate
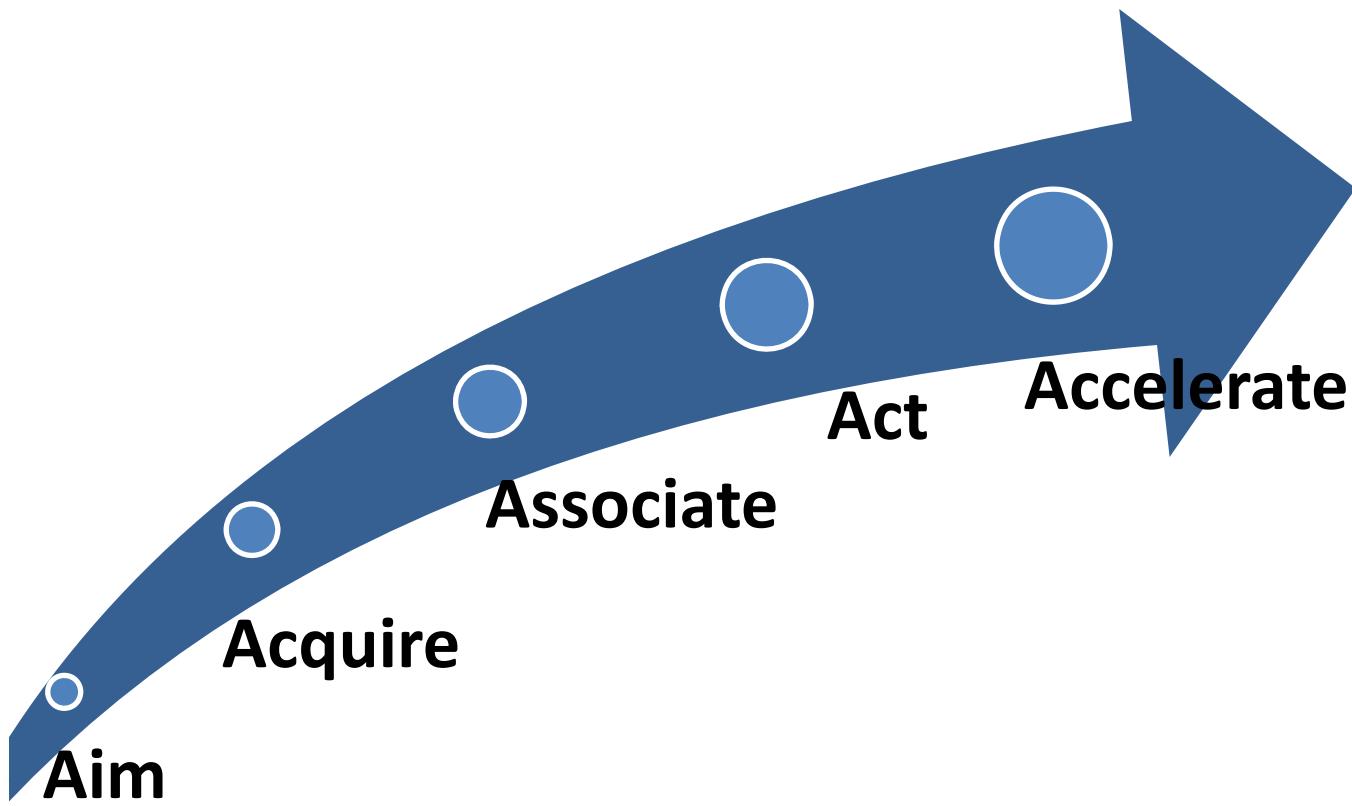
Anybody Can Do it!

Knowing What…. You……. Want….

Abe's Five A's to Become an Awesome PM
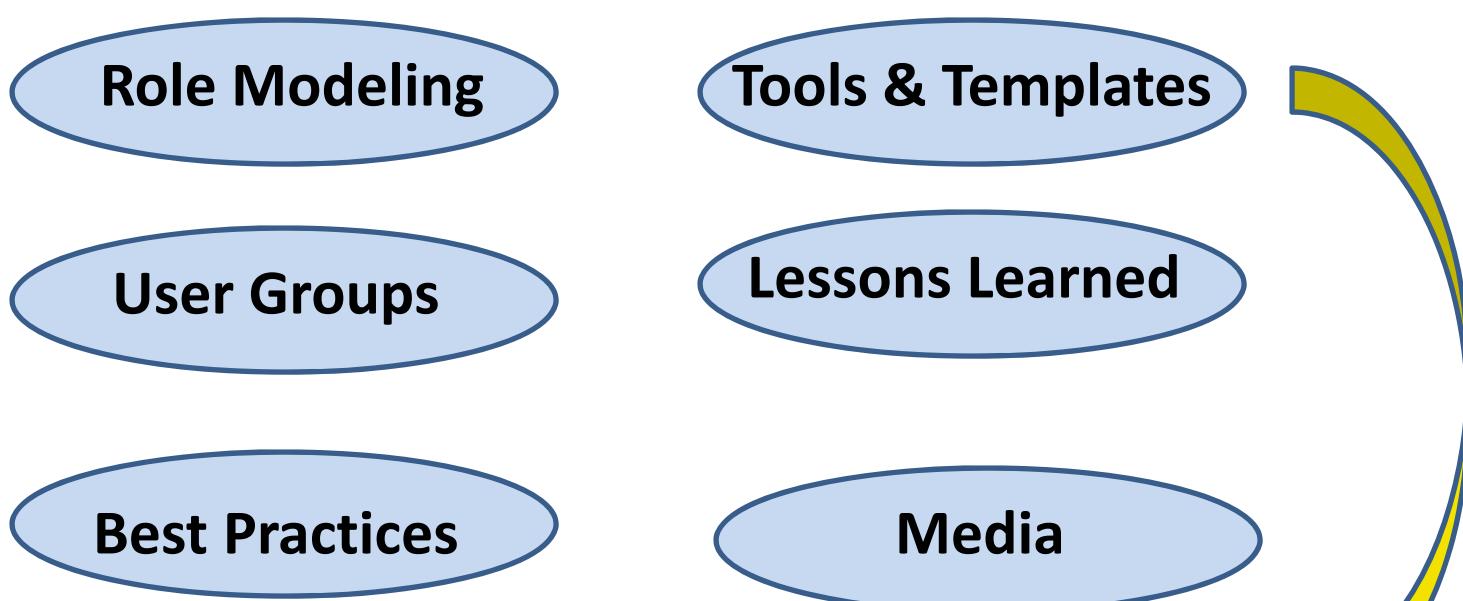
Aim – Know What You Want

Acquire Knowledge

Role Modeling

Tools & Templates

User Groups

Lessons Learned

Best Practices

Media

http://www.projectmanagementdocs.com

Abe's Five A's to Become an Awesome PM

Aim – Know What You Want

Acquire – Knowledge

Associate – with Right Entities

Associations

Business Schools

Universities

Consulting Org.'s

Sample of Industry Associations

PMI – Project Management Institute

World's leading not-for-profit professional membership association, 2.9 million members

Has standards, certifications, publications, Global & National conferences, Project-of-the-Year Awards

IPMA – International Project Management Association

Swiss registered non-profit membership-based organization

Promotes project management discipline internationally: certifications, conferences, IPMA Awards

AMA – American Management Association

Leader in professional development, organizations worldwide

Training, Seminars, Sponsorships, Alliances

ITIL – Information Technology Infrastructure Library

Provides consistent and comprehensive set of practices for Information Technology (IT) industry

Promotes standard approaches to service management geared to IT, world-wide, has certifications

Abe's Five A's to Become an Awesome PM

Aim – Know What You Want

Acquire – Knowledge

Associate – with Right Entities

Act & Adjust – Learn by Doing

Application

Plan-Do-Check-Adjust

Agility

Flexibility

Focused on Goals

Abe's Five A's to Become an Awesome PM

Aim – Know What You Want

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Associate – with Right Entities

Act & Adjust – Learn by Doing

Accelerate – Internalize

Certifications   Degrees

Sample of Industry Certifications

PMI – Project Management Institute

CAPM	Certified Associate in Project Management
PMP	Project Management Professional
PgMP	Program Management Professional

IPMA – International Project Management Association

1st Level	Certified Project Management Associate
2nd Level	Certified Project Manager

AMA – American Management Association

Certificates	Project Management, Supervisory, Management Excellence….
Attend	3 qualifying seminars in a 24-month period

ITIL – Information Technology Infrastructure Library

|	
Foundation	Basic certification for increasing awareness
Intermediate	More intense on modules: Strategy, Design, Transition, Operation, etc.

Prince2 – Projects in Controlled Environments, version 2

Certification	By UK government agency Office of Government Commerce (OGC)

# Take Away: How to become a Good PM

 # 1 – What: Project Charter

 # 2 – Who: People

 # 3 – How: Project Management Plan

 # 4 – Pillars: Scope, Cost, Time & Quality

 # 5 – Keys: Governance, Resources, Communications, Change and Risk & Issue Mgmt

Abe's Five A's to Become an Awesome PM

Aim

Acquire

Associate

Act

Accelerate

Anybody Can Do it!

SUCCESS...

"...Don't do anything that wouldn't make your Mommy proud!"
H. Jackson Brown Jr.
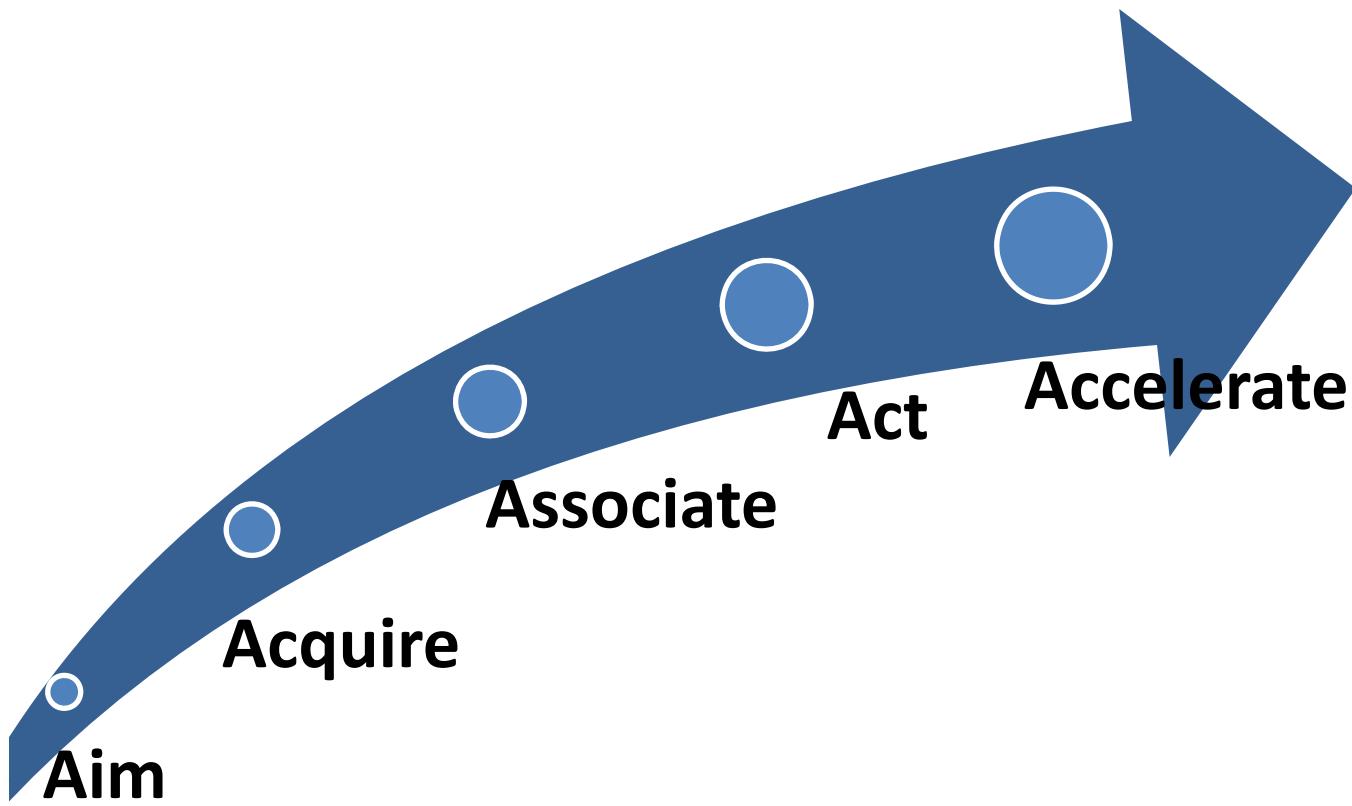
Knowledge Gained & Applied Consistently

Thank You!!!

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✓30 years Consulting: **ERP, Management, Information Technology**

✓ 15+ years Training: **ERP, Management, Information Technology**
Provides Training for Project Management Institutes Certification Exam Prep Courses

✓ Certifications: **PgMP, PMP, PMI-RMP, ASAP, ITIL v3 Foundation**

✓ Speaker & Author: **National & Global Management Conferences**

✓ Pursuits: **Having Fun through: Management Consulting & Training**

Questions?