@task

6 Proven Tools for Project Success
The Value of PPM

This document provides resources and ideas for companies who know they need tools to help them organize their work and who may be struggling to justify the cost of a full PPM solution.

Getting Your Stuff Together

We often have the opportunity to talk to business leaders about the need to organize the activities of their workforce. Many of these groups are outgrowing spreadsheets or home-grown applications and are turning toward centralizing the management of their work.

> **A centralized task list alone can save the organization $1,275 per person**

Often someone in the organization gets fed up with the spreadsheets, the lack of communication, and the missed deadlines; and rallies everyone around the concept of using a centralized online task list to cut through the confusion. The benefits of this include greater visibility into what's happening at any given time, and the ability for the front-line to know what they need to be doing.

> This is a great first step for an organization. It will increase efficiency in the workforce and management's interactions with it by:
> - Reducing the frequency and length of status meetings
> - Reducing the need for management to 'call around' to get information about task progress

If the average employee's salary is $50,000/year, saving only 1 hour/week will result in a $1,275 direct benefit to the organization.

Shouldn't I Start Simple?

Departments and companies just getting into task and project management software will be tempted to purchase a simple solution for two reasons. First, when a company is new to project management software the complexities can be daunting. A powerful solution can seem like 'too much' functionality and can be overwhelming.

Second, simplistic solutions cost less. We've all heard the phrase, "You get what you pay for", and that sounds good in this case because when you start simple you don't want much. we periodically hear people say, "All I want is a simple online task list for my people."

> Simple solutions should at least provide the following functionality:
> - A central location for planning and managing multiple projects
> - The ability for users to update task status
> - Notifications to project managers and workers when tasks are complete
> - The ability to share notes and documents on tasks and projects
> - Visibility across multiple projects

While easy to use, **@task is not the least expensive** or most simplistic solution you can find. This might make your decision difficult because you've got to get purchase approval and your financial controller will probably ask you if this is the cheapest solution on the market for what you need to do. If your vision is limited to that online task list, your answer is going to be 'no'. **This document will help you understand what happens beyond the basics in PPM.**

Just Beyond The Basics – Scheduling & Early Warning

Let's suppose you start with the online task list (e.g. 'the basics'). In a few months everyone will be patting you on the back for putting it up, but, true to the adage of the camel's nose in the tent, you will soon find that the online task list was just the beginning. **Now that people can see what's going on, they will start asking hard questions.**

> **An online task list is just the beginning**

For example, once tasks are online and organized into projects, people will want to do real scheduling. There are two key areas of scheduling: Time and Resource Scheduling and Workflow Scheduling.

'**Time and Resource Scheduling**' deals with how time is allocated to the people doing the work. You will want to have one or more calendars defined for your company so that you can manage schedules. For example, what happens to a project if a group wants to work four-10hr shifts vs. five-8hr shifts? What happens if a user wants to enter a week of vacation in the spring?

> **Time and resource scheduling is making sure you have the resources you need**

The system should allow you to calculate around these changes. If you are limited to manually typing dates on tasks, you'll be making up for the cost-savings you got through sweat equity.

Another element of Time and Resource Scheduling is making sure you have the resources to do the work you want to get done. If you have people working on multiple projects throughout the organization, you need to know what their overall availability is and how projects will be affected by assigning different people. Along those lines, you also need to know if the people you want to assign tasks to have the skills to do that work.

Important 'Time and Resource Scheduling' functionality includes:
- Support for multiple work calendars
- Support for user vacations and time off
- Visibility into user's workload
- Support for role profiles (e.g. designer, programmer, etc.)

'**Workflow Scheduling**' deals with how processes are defined and enforced. A simple example is that task B cannot be started before task A is done. This is called a task dependency. Task B depends on Task A. Typical workflows use several types of dependencies. The most important reason for dependencies is projections— a reason that very few solutions address. Is it important for you to **know that a project is running late BEFORE its too late to do anything about it**? If so, you need projections! @task looks at the progress that has been made and estimates a completion time based on what's been done combined with the schedule of the person assigned to do it. The new projected completion time automatically affects the projected start time of dependents throughout the entire project. In this fashion, a two month long project can automatically warn its project manager as early as day two of potential problems created by slow progress.

Another important aspect of Workflow Scheduling is the ability to approve work that's been done before the rest of the work can continue. Approval processes are critical when management needs to be involved in a project's completion.

Tools and features related to workflow scheduling include:
- Support for multiple task dependencies and task scheduling constraints
- Support for projected dates
- Ability to compare planned, projected and actual dates in a timeline
- Support for approval processes

> **Sometimes a few days can mean a great deal to the bottom line**

This is good functionality, but how do you justify the extra cost? Ask yourself: **What percentage of your projects are late**? What percentage of those would get done on time if you had the ability to tie people's scheduling and automated projections together? **What are late projects costing you**? This can be hard to measure. Sometimes a few days can mean a great deal to the bottom line of an organization.

Managing Change

We accept the idea that projects never go 100% according to plan. Needs change midstream. Unforeseen issues arise. Organizations often attempt to use one solution for project management and a different solution for tracking issues. This can get unwieldy, especially if the issues affect a task's completion or should really be part of an approval workflow.

@task provides integrated request tracking on projects so that day to day issues that arise can be a seamless part of a project's status and completion.

Some of the features that are critical to a successful issue tracking effort are:
- Integrated issue tracking and project management
- The ability for issues to participate in project workflows (e.g. projects and tasks cannot be completed while current issues exist)
- Support for custom fields on issue entry forms
- The ability to route issues to the correct people and projects

Well Beyond the Basics – Continuous Improvement

"You can't manage what you can't measure". We've all heard that expression. How does it relate to your project management initiative? Organizations often have repetitive processes,

or at least general common structures to their projects. Over time, many similar projects will be completed in your organization. As you look back, you may be asking questions like: What areas of those projects tended to be over budget? What areas of those projects tended to be late? Are there trends in those projects that will help us identify areas where we can cut out waste?

> **You can't manage what you can't measure**

The answer to these questions lies in process improvement functionality. @task provides tools for managers to compare similar projects and tasks and to look at trends for cost, schedule, slack time, down time, etc. This can be a huge value to organizations. For example, @task recently helped a manufacturing company trim its new product development time from 55 weeks to 49 weeks using these tools.

Features required for solid process improvement analysis include:
- The ability to track planned vs actual dates, hours of work, and costs
- The ability to create work templates from which similar projects and standardized processes are created
- The ability to compare similar tasks or projects and to identify averages and outliers

Advanced Topics – Maximizing Your Resources

Any company can keep people busy, winning companies keep people busy doing the right things. One of the most important values a solution like @task brings to your organization is in project selection. How do you know the projects you are working on are the best ones you could be doing? **Maximizing the positive impact limited resources have on your organization** requires informed project selection.

> **How do you know the projects you are working on are the best ones you could be doing?**

all people. all work. all together.™

Right now, you can probably think of several different projects you'd like to undertake to get a competitive edge. You may wonder, "Can we do all of these projects now... or when can we do them?" You may feel like putting a current project on hold in favor of a new one that has more value to the organization. These seem like reasonable ideas, but getting actual information on the effects of your changes may seem daunting. In fact, it may seem easier to just stay the course on current projects and bring up your great idea later.

All too often, **organizations end up doing the projects that people who talk the loudest want done**. @task provides a way for organizations to make data-driven decisions. These decisions come through two disciplines: Demand Management and Capacity Planning.

Demand Management describes how you collect ideas throughout the organization. Do customers have a way to provide input? What about the employees who work with those customers? Healthy organizations have ideas flying in from all directions. To help make the decisions about which of the ideas have merit, they need to be organized according to common groups and then evaluated along common criteria such as potential benefit to the organization, risks involved, alignment with core organizational strategy, and resources required.

Keep track of ideas that may provide a competitive edge

Once this evaluation has been done, these ideas for projects get approval or rejections and the approved ideas get prioritized and lined up for planning.

Demand Management helps your organization keep track of ideas and initiatives that may provide a competitive edge.

Key capabilities needed for Demand Management are:
- The ability to gather and organize ideas throughout the organization
- Support for common analytical criteria such as risk, benefit, cost, and alignment
- Support for project lifecycle elements of request, review, approve, and plan

Capacity Planning helps you know what you can do now and helps you maximize your current resources. Doing this type of planning is like playing Tetris with projects. Suppose an idea comes up that is an obvious winner; one that should be done right now. We'll call this our 'Emergency Project'. Can you do the Emergency Project now? If so, will it affect anything else? What will it affect and how? If a project gets delayed, which one should it be? Organizations faced with these questions sometimes have to take weeks just to come up with an answer.

@task provides organizations the ability to model these questions in a drag-and-drop environment where the results of the changes can be seen instantly. An executive staff will be able to look at current commitments, current resources, and proposed projects and organize them according to priority and ability to fit into the current resource pool.

Capacity Planning gives your organization the ability to plan into the future in such a way that you **maximize your resources and organize projects according to their value to the organization**. Additionally, Capacity Planning gives you the ability to answer the hard questions of, "How will my Emergency Project affect what's currently going on?"

Key features needed for capacity planning are:
- The ability to estimate resource needs on proposed projects
- The ability to create resource budgets
- Support for what-if modeling of proposed plans against resource allocations
- The ability to reconcile plan changes at the project level

Business Intelligence

Business Intelligence in a project management solution means that you have key data at your fingertips. This key data often comes as a result of a report. Remember, one of the big reasons for getting into this solution is for 'visibility'.

Have the data you need at your fingertips

Some of your questions may be: What critical path tasks are running late? Which projects in my department are running over budget? How many hours did people who report to me work last week? What is the average age of issues that are bugs? What is our planned cost of labor by week for the next four months?

@task gives organizations the ability to slice and dice a vast amount of information in ways that are useful to that organization. The reports created to provide this information can be used as dashboards to give executives quick access to real-time decision-backing data.

Key features supporting business intelligence are:
- User managed dashboards
- Ad-Hoc report building tools
- Report logic for analytics

Summary

Every organization, regardless of size, is going to compete better if they choose the right initiatives and do them more efficiently with greater probability of success. @task goes beyond the basics in providing your organization with the tools necessary to compete better – this is the full value of PPM.

It includes the ability to do:
- Centralized task and project management
- Resource scheduling and portfolio optimization
- Early warnings for late trends
- Process improvement tools
- Capacity planning and demand management

AtTask (http://www.attask.com) is the project and portfolio management (PPM) solution that focuses all knowledge workers on those activities that make them and their company more effective, innovative and competitive.

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