A Week in the Life of IT Project Portfolio Management Stakeholders
A Practical Guide to Understanding and Realizing Business Value from Cloud-Based Project Portfolio Management Systems
Introduction

This white paper describes a typical week in the life of six IT project portfolio management (PPM) stakeholders. It describes how IT PPM systems can be deployed to meet the stakeholders’ daily business needs and enhance their productivity. Its goal is to provide a practical guide and a starting point for understanding the potential business value of cloud PPM solutions.

The six people we will meet are introduced, the user category each of them represents is described, and a sampling of their core business needs is presented. The enterprise these stakeholders represent is fairly typical. The six individuals are not new to PPM concepts, nor would they be considered sophisticated practitioners. The company has traditionally used a combination of spreadsheets, e-mail, and intranet/shared drives to communicate and coordinate its PPM processes.

The company is best described as being at level 1 (Active) of the maturity model presented in A Guide to the Project Management Body of Knowledge (PMBOK Guide).\(^1\) Its processes are neither chaotic enough to classify the company as a level 0 organization nor consistent, responsive, or business-driven enough to qualify the company as a level 2, 3, or 4 organization. This paper is intended for organizations that are at a similar point in their evolution and that are interested in exploring a more Web-based, centralized, and integrated approach to PPM.

Stakeholder Overview

The following table provides an introduction to the representatives for the stakeholder categories and a sample of each person’s key business needs.

<table>
<thead>
<tr>
<th>NAME</th>
<th>USER TYPE</th>
<th>SAMPLING OF KEY NEEDS</th>
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<tbody>
<tr>
<td>Aida</td>
<td>Executive assistant</td>
<td>• Ability for the system to automate the collection, formatting, and distribution of executive reports and dashboards so she can “go back to her day job”</td>
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<tr>
<td>Eric</td>
<td>IT executive</td>
<td>• Up-to-date and accurate project portfolio dashboard/scorecard</td>
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<td></td>
<td></td>
<td>• Ability to drill down on dashboard/scorecard metrics, such as cost and ROI data for decision support purposes</td>
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<td></td>
<td></td>
<td>• Tools to link project activity with IT and business strategy</td>
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<tr>
<td>Pam</td>
<td>Program manager</td>
<td>• A simple way to aggregate all child project data to the program</td>
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<td></td>
<td></td>
<td>• A quick and easy way to request and gain approval for project resources</td>
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<td></td>
<td></td>
<td>• A simple process for reporting on program status, issues, risks, costs, and so on</td>
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<tr>
<td>Paige</td>
<td>Project manager</td>
<td>• Tools to facilitate the project planning and approval process</td>
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<tr>
<td></td>
<td></td>
<td>• Tools for developing project schedules, deliverables, and milestones and monitoring status, issues, risks, and alerts</td>
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<td></td>
<td></td>
<td>• A platform for communicating decisions, collaborating with project team members, and reporting to stakeholders</td>
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<tr>
<td>Reece</td>
<td>Resource manager</td>
<td>• Resource capacity, allocation, scheduling, and actual utilization tracking across multiple projects over an extended planning horizon</td>
</tr>
<tr>
<td>Mel</td>
<td>Project team member</td>
<td>• A My Work home page for easy access to project assignments, schedules, documents, and so on</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A simple task and time reporting process</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• A quick and simple way to collaborate and share project information</td>
</tr>
</tbody>
</table>

A Week in the Life of an Executive Assistant: Aida

Aida’s first task on Monday morning is to create and distribute the executive PPM dashboard for the previous week to her boss, Eric, and his peers on the IT governance committee. Eric is an IT executive responsible for the IT PPM practice. A key function of the IT governance committee is to ensure that IT investment in resources and projects is aligned with the IT strategy and broader corporate goals. The executive dashboard is a scorecard of project and portfolio investments, health, risk, and return information. The report is also distributed to senior managers in the company, many of whom serve as the business sponsors for strategic projects and programs represented in the executive dashboard.
Before her company deployed a state-of-the-art on-demand PPM system, Aida spent hours collecting project information from multiple sources, formatting it into a report, and distributing the report via e-mail and hard copy. This process was error-prone, because there was no single data repository and the collecting and formatting process was, in part, performed manually. A typical Monday for Aida was consumed by preparing the executive dashboard. This was a thankless job, and the only time she ever received any feedback on her efforts was when the dashboard was late or incomplete.

Fortunately for Aida, less than six weeks ago, Eric pushed through the purchase and deployment of a new, cloud-based PPM system. This centralized solution automates the report formatting and distribution process and also enables executives to view the reports online, which not only saves time but also ensures that the information is as accurate and up to date as possible. Aida schedules the report to run automatically each week and to be distributed via e-mail to the executive distribution list. She also has a one-click option to print it to PDF for those who prefer a hard copy.

The new system has essentially given Mondays back to Aida, who is now free to work on other important assignments.

Figure 1. The executive dashboard can include information such as project counts by health, a project risk/return matrix bubble chart, percentage of project spending by category, and project alignment by strategy.
A Week in the Life of an IT Executive: Eric

Eric is accustomed to waiting most of Monday to receive the project dashboard from Aida. Now he finds an automatically generated report in his e-mail inbox by 8:30 a.m. Because the system is Web-based and can be accessed from anywhere at any time, Eric has started to access the dashboards from his iPad while traveling.

On Tuesday Eric spends some time reviewing what has changed since his last review of the project portfolio dashboard. He goes online to access his own personalized dashboards, which enable him to drill down on the graphical components of the charts and evaluate the underlying data on costs, risks, and issues at the project, program, and portfolio levels. As a result, he identifies areas requiring either immediate executive attention or sponsor intervention.

On Wednesday Eric meets with executives and sponsors to address the issues he has identified, in advance of the governance committee meeting on Friday. He figures that this will give them at least one full business day to look into the situation and get a quick status update on the issues. He e-mails the relevant dashboard report in PDF format to some of the executives and responds to requests to securely publish the dashboard to an executive portal for viewing online.

On Thursday Eric goes online to review the list of project requests, proposals, and in-flight projects. He and his peers have been receiving “request for approval” notifications all week, but he hasn’t had time to take any necessary action until now. The workflow identifies Eric as being responsible for scoring, reviewing, and approving project business cases—including alignment with key IT strategies—before they go to the broader governance committee for final approval. The last business case Eric has approved is for a project to develop new testing software in support of a new service offering. The project scored high, because it is aligned with a business strategy to grow topline revenue as well as with a corporate goal to increase customer satisfaction through improved service quality.
Eric joins his colleagues on Friday morning for the governance meeting. The committee likes to start the proceedings with a high-level strategy review and drill down to portfolio and project execution matters from there. The committee members first review some dashboards depicting key business and IT strategies and the aligned programs and project investment in terms of dollars, resources, and project counts. They are confident about making decisions based on the dashboard data, because it was generated directly from a single, centralized PPM server.

The first thing the team notices is that there is a key strategy that doesn’t have any project activity aligned with it. Thanks to the new cloud-based PPM system, the company can not only ensure bottom-up alignment of existing project ideas or in-flight projects with IT and business strategy but can also drive strategy execution from the top down. The strategy execution management capability enables the governance committee to view a hierarchical map of IT and business strategies and then use those strategic priorities to drive project ideas and requests. The team creates an action item to find out if the execution of the strategy in question depends on project activity and to determine what, if any, project activity is required to execute the strategy.

The governance committee finally has the timely information it needs in order to decide whether to start proposed projects, kill unnecessary projects to free up resources and funds for other strategic projects, or simply discuss the status and issues of ongoing projects. The members now have a project portfolio scorecard they can use as an executive decision support tool to drive strategy execution and business alignment.

Eric believes that the IT PPM solution is one of the best investments he has ever made. He is finally getting a compelling return on one of his IT vendor investments and, because it is a cloud-based, software as a service (SaaS) PPM solution, he doesn’t have to invest in his own internal IT resources or technology infrastructure to maintain the solution. To top it off, he is now a hero among his governance committee peers, because the meetings require only half the time they used to and everybody is able to take off early for the weekend.
A Week in the Life of a Program Manager: Pam

Pam leads a program whose goal is to deliver a new service offering that encompasses several IT projects, including a backbone upgrade, new hardware installation, new internally developed software applications, and additional call center training.

On Monday her program team identified the need to launch a new project to develop testing software for the new software application. Project business case approvals are issued only at the monthly governance committee meetings, so before the new PPM system was deployed, there was little chance she could push the request through the process before the next Friday governance meeting.

Pam uses the new PPM system request/proposal management functionality to justify and gain approval for the project business case. The system ensures that all project ideas and requests are subjected to a consistent business case structure, project scoping, and approval process. The workflow has been configured with a set of weighted project scoring and selection criteria defined by Eric in collaboration with the IT governance committee. Eric and other reviewers receive automatic alerts and notifications as well as direct access to supporting documents. By Thursday Eric has signed off. As a result, Pam has everything in order for the Friday governance committee review.

![Figure 4. A configurable and automated project request workflow and approval process streamlines the review process.](image)

On Friday the project business case is approved. Pam is now ready to develop the project plan, which will go back to the governance committee for the second tollgate approval before the project can be formally launched.

Pam is delighted with how the system has already streamlined the initial review and approval process and has enabled her to exceed the program’s time-to-market stretch goals. She believes that this ultimately will translate into increased ROI for the new service offering and have a significant topline impact on the company.
A Week in the Life of a Project Manager: Paige

On the following Monday, Paige is asked to work on the project plans and schedule for the testing software project. This includes several standardized preproject document templates that have been defined by the project management office (PMO). The PMO has identified some best practices to ensure successful project planning and execution. These best practices cover project initiation, planning, design, resource requirements, scheduling, financial models, and other templates. All standardized documents, tools, and templates are found in a secure and centralized knowledgebase provided as a standard, fully integrated component of the new cloud-based PPM system.

The project planning exercise identifies resources required immediately to complete the project schedule and planning templates (such as to develop estimates and high-level designs) as well as resources required to execute the plan to deploy the new testing software. After the project plans and schedules are approved, additional resource requirements for project execution can be identified.

By Monday afternoon, the resource requests are sent to the resource manager, Reece. Reece assigns specific individuals to help complete the project plans, and he “soft-books” the resources requested to execute the plan (that is, he allocates time by requested role or required skill set but does not assign specific individuals until a more detailed project schedule has been developed).

On Tuesday Paige starts working on the detailed project schedule. She uses Microsoft Project to generate the initial schedule. She plans to eventually perform day-to-day individual project scheduling and tracking tasks with it and periodically synchronize Microsoft Project information with the new PPM system, which will serve as the system of record for project creation, task and assignment tracking, resource utilization, phase review approvals, project metrics, and cost tracking.

By searching the knowledgebase with the robust built-in search engine’s full document content search capability as well as complex queries and keyword matches, Paige finds a set of preproject documents for a very similar testing software project completed recently at the company’s R&D center in India. Rather than performing redundant activities, Paige is able to repurpose some of the document content from a project executed halfway around the world to gain approval for a project right here at home.
A Week in the Life of IT PPM Stakeholders

Because this is a small, well-defined project, Paige is able to pull together all the documents by Wednesday and share them with the PMO the same day. By Thursday a PMO member has reviewed and approved the project documents and designs. With the PMO’s sign-off, Paige is now ready to proceed to the second major tollgate—the governance committee architecture, business, and financial review—so she submits the project schedule and plans to the governance committee for approval to begin development.

The testing software project appears in Paige’s project listing page, showing all proposed and in-flight projects she is responsible for as well as projects with a dependency relationship. To be successful in her role, Paige needs to stay on top of the status of all projects in terms of planned versus actual schedule and budget, resource utilization, risks, issue escalations, and resolutions.

To maximize her productivity, Paige has dynamically defined her own viewing preferences, limited only by the access control permissions set at Eric’s level. She selects the columns most important to her—such as schedule status and budget information—and drags and drops them in the desired order. She adjusts the widths of the columns to optimize screen real estate and sorts rows based on several different grouping and filter options. She then saves the view preferences so they are preserved for her next session.
A Week in the Life of IT PPM Stakeholders

Figure 6. Viewing preferences can be customized for planned versus actual effort and budget project listing pages.

With the new PPM system, Paige has so much flexibility in personalizing her listing page and printing or exporting the exact contents of her listing page to Excel that she no longer needs an external report writing tool. The new PPM solution even automatically generates a complete program and project status report presentation in PowerPoint. The one-click PowerPoint storyboard presentation generator populates an end-user-customizable PowerPoint template that includes graphs and tables with up-to-date system data. She can then further edit the template with PowerPoint.

Paige now spends the majority of her week coaching, mentoring, and motivating her project team members and removing project execution obstacles and spends a lot less time generating status reports and fussing with project administration details.

A Week in the Life of a Resource Manager: Reece

Reece used to spend all of his time in meetings explaining resource shortages and trying to keep his valuable internal resources from being overallocated. This was difficult, because the old system and process provided only basic resource assignment and loading visibility (such as who was working on what and how much time was being spent per resource on a given project). The inability to account for nonproject time and allow for uneven distribution of project work at weekly or monthly intervals created additional challenges. Because project resource requests came with limited information about relative priority and inconsistent criteria were used to define priorities, resource assignments frequently defaulted to a “first come, first served” process at best and a “who screams the loudest” basis at worst.

With the new system, requests for resources—such as those associated with the testing software project—are sent to Reece via an automated and structured process. He has received project approval notification from the last IT governance committee meeting, and the implementation plan was
subsequently approved by the project review board last Thursday. Reece has never had this basic level of project pipeline demand visibility before.

Because the project was given a relatively high priority, Reece has made it his priority. The new system tracks granular resource availability information and more than 100 resource attributes, so he is able to easily match the availability of qualified resources with Paige’s required resource attributes (geography, role, cost, and so on). Paige has specifically requested the services of a particular software engineer as the lead developer. Using the type-ahead feature in the resource search field, Reece quickly finds that particular resource in the system and selects him after verifying his availability. The system then automatically notifies Paige and all project team members of their new assignments.

Because individual project allocation and assignment tasks are handled more efficiently than in the past, Reece is able to spend more time looking at higher-level utilization metrics and planning for future capacity needs. His Heat Map By Role report (see Figure 7) shows project resource load over an extended planning horizon. Reece uses this to model his resource needs and support potential requests to supplement his resource pool with additional internal hires or external resources.

**Heat Map By Role**

![Heat Map By Role](image)

**Figure 7.** The Heat Map By Role report shows the project resource load over an extended planning horizon.

As his organization and process mature, Reece looks forward to leveraging more-advanced resource management capabilities such as sophisticated what-if scenario planning, resource leveling, and optimization algorithms and integrating more-robust cost and risk considerations into his process.

Since the new system was deployed, Reece has started to feel like a part of a team that is rowing together. More important, he is able to better manage the resource needs of his organization on the basis of data and facts, rather than being driven by emotion and the pressure to provide quick fixes.
A Week in the Life of a Project Team Member: Mel

As a project team member and the recently appointed lead developer for the testing software project, Mel is focused on completing tasks and keeping his project manager and stakeholders informed. He reviews the project implementation documents and deliverables templates Paige loaded into the centralized knowledgebase. Because documents can be linked in any phase of the project lifecycle—from ideas and requests to proposals, business cases, and in-flight projects—project team members such as Mel no longer have to hunt for documents located in multiple distributed shared drives. He reviews the assigned task items within the preliminary project schedule created by Paige.

Mel finds that he is able to use the new PPM solution to work with other team members to efficiently complete assignments, update the status of personal tasks and assigned activities, view the status of project schedule tasks and deliverables he is depending on, and track his time by using the online time sheet. His system is configured to provide visibility into only the information and functionality he needs to get his job done. Like his manager, Paige, he can further personalize the pages he uses most frequently to match his individual viewing preferences.

Mel now feels that he finally has the information he needs in order to do his job. He used to feel in the dark about what was required of him. Now the information he needs is presented by the system in a clear and concise manner and he can collaborate in real time with people on his team, no matter where they are.
About Instantis EnterpriseTrack

Oracle’s Instantis EnterpriseTrack is a leading enterprise PPM solution used by IT and business process leaders to improve strategy execution through better work and resource management. It provides an end-to-end system for managing, tracking, and reporting on enterprise strategies, processes, projects, programs, portfolios, resources, costs, and benefits.

Leading global corporations rely on Instantis EnterpriseTrack to meet the distinctive requirements of their strategic project portfolios, such as IT PPM, enterprise PMO, new product development, and business process improvement. The full-featured end-to-end application for PPM ensures that high-value projects are completed faster with existing resources, so organizations start accruing financial benefits sooner and realize a compelling ROI in less than one year. Unlike competitors’ alternatives, Instantis EnterpriseTrack is easy to deploy quickly, easy to use and administer, and easy to afford.

The heart of the Instantis EnterpriseTrack system is its market-leading dashboard and reporting capabilities, which have been described in analyst reports as “unprecedented in the industry.” These features enable organizations to easily and instantly compose and share project- and portfolio-level dashboards and reports in any phase of the project lifecycle, from ideas to proposals, project execution, metrics, and—finally—results.

Instantis EnterpriseTrack runs on Oracle’s Instantis EnterpriseTrack Cloud Service, a state-of-the-art cloud/SaaS application framework that provides proven enterprise-class security, availability, and performance levels. Instantis EnterpriseTrack Cloud Service is well known for its unmatched out-of-the-box configurability and deployment time frames, which can be measured in days, not months.

Conclusion

Organizations that deploy a cloud-based IT PPM system can meet stakeholders’ daily business needs while improving strategy execution, productivity, and resource management. Instantis EnterpriseTrack provides a cost-efficient, full-featured end-to-end system and a rapid ROI for businesses interested in exploring a more Web-based, centralized, and integrated approach to PPM.