

EPM Implementations:

Ten Principles for a Successful EPM Implementation

EPM – Enterprise Project Management

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▶ *Successfully implementing an EPM initiative with Project Server can take your organization, and your PMO, to another level of efficiency. But it is fraught with risks and requires careful planning and diligence. Reviewing lessons learned from other implementations is invaluable. Some best practices for deploying EPM with Project Server follow...*

10 Principles for Success

1. Actively design EPM and continually review

Once a pilot EPM installation is brought up in a new environment, the benefits are usually obvious - and other departments or business units want one of their own. Or, perhaps compliance or governance initiatives have each been approached individually and in an uncoordinated fashion. Siloed installation are not so much of a danger, as they are a missed opportunity for strategic impact by the originating department (especially IT).

Actively designing EPM involves senior executives taking the lead and participating in developing the vision for EPM within the Enterprise. Coordinating implementations strategically will set the stage for Portfolio Management views that are not disconnected from day to day activities. And a successful vision also requires frequent review by decision makers to make sure all the advantages of an EPM initiative are documented and shared among departments.

2. Make large adjustments to methodology/process infrequently

Any EPM initiative will bring project methodology changes along with it, but plan

these wisely, bringing in small changes over multiple, well planned phases. Big Bang, turn-the-switch-on changes never work. Ever. And don't forget that a Project Server implementation can be a lever for change, but is only a tool that supports changes in People and Processes.

3. Involve senior managers

Many senior managers are willing to be involved but are not sure where to best contribute. Senior managers are involved in strategic decisions, and so do not usually concern themselves with exception processes, which is how an EPM system can get pigeon-holed. Position EPM as a tool for strategic forecasts and planning, as well as a way to monitor exceptions to strategic processes.

It's very helpful for the CIO and his or her staff to communicate EPM through a Project Management Maturity Model picture or matrix. The matrix provides a vehicle for discussing each senior manager's role and any concerns they have.

4. Make choices - beware conflicting goals

It's not possible for EPM to be everything to everybody, and cannot meet every group's goal. As a matter of fact, it will

highlight differences in understanding of company policies and methodologies and provide a vehicle for discussion of those differences. The key is to allow business drivers and principles guide these choices.

5. Define issue resolution

Issues and Risks are powerful features in any EPM system many organizations will be tempted to use immediately. Not defining a workflow for how to handle, assign, and resolve them can result in a political mess than can sap enthusiasm and buy-in for the implementation. Make sure the issue handling process is clearly understood by all, has a few stages to move issues up to senior management attention, and are included in any lessons-learned loop within the PMO.

6. Provide incentives

If well designed IT governance is not as effective as expected, the first place to look is incentives. Much has been written about the need to tie reward systems with desired business focus, but all too often the senior support is not there to provide incentives for goals related to timesheet compliance, documentation requirements on the system, or higher level PM Maturity objectives.

Proper incentive programs can encourage synergy between departments and ensure strategic alignment of the project portfolio. Avoiding the issue increases the risk of your initiative becoming shelf-ware.

7. Assign responsibility to resource managers

Like any major organizational initiative, EPM requires ownership and accountability, and at multiple levels. Ultimately,

executives are responsible for results, and PMO directors are responsible for reliable information being passed up the chain, but a successful implementation goes all the way down to updating task statuses regularly and accurately by team members.

Many of the building blocks for aggregated reports, and the value received from them, are performed by members that report to resource managers. Formalizing that responsibility, to hold Resource Managers accountable for these basic tasks among their reports, will ensure compliance, consistency of work, and contribute a great deal to the goal of a transparent EPM environment.

8. Unlock Project Portfolio Management features

Once you have a measure of comfort with data in the system, experiment with Portfolio Management features, even if they were not in the original scope. The value of the aggregated data can not be underestimated to senior decision makers, and communicated correctly will nearly always firm up new support for your initiative.

9. Provide Transparency and Education

It's virtually impossible to have too much transparency or education about EPM. The two go together - the more education, the more transparency, and the more confidence in the initiative. Communicating and supporting EPM is the single best role senior decision makers can have, and any demonstration of a lack of understanding is an opportunity to understand the business better and communicate the value of the system.

Plan on role-based training that is available far after the project close date. For large installations, it is not unusual to schedule regular, quarterly training sessions for each role. The sessions can be attended by new employees, transfers, and anyone that needs a refresher. A regular program is also a great vehicle for gathering feedback or for introducing new features that will be unlocked.

10. Integrate EPM feedback into Governance initiatives

A guiding principle for Governance programs within the enterprise is transparency, and EPM is ideal for exposing budget and schedule statuses and enforcing compliance with process requirements. People in the business that "speak" Governance, whether the CFO, CIO, or Division managers will find much to appreciate what EPM brings to the table. If you have not brought executives responsible for Governance into the loop on your EPM initiative, a great opportunity is being missed.

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