Project Management Maturity:
Using Software to Setup Project Management Processes

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About the Speaker

Iulia Amariei – Director Business Development & Customer Care ANZ & APAC at ARES PRISM

- Iulia has more than 25 years' experience in technical sales, solution design, implementation and software support. Her comprehensive knowledge extends to Project Controls and Project Management Systems and procedures. She's helped build solutions and add value to software processes and procedures for many clients both domestically and internationally. Her work includes implementations across many market sectors including oil and gas, infrastructure, mining, engineering and construction. Iulia brings with her broad experience. She has worked with both private and government clients, from small projects all the way up to mega-projects.

Project Management Maturity

Using Software to Setup Project Management Processes

About the Topic

Topic outline

- Some argue that project controls software can only be used by organizations that already have mature processes in place to support them. But that is simply not the case. Implementing a scalable, robust, and intuitive system can harness industry best practices and support new and improved processes. Join this session to discuss what project management maturity looks like at different organizations. Learn about the common difficulties present when introducing a project controls system in an immature project management environment as well as the benefits of using the implementation of software to drive project management maturity.

A company does not need to reach a certain level of project management or project controls maturity in order to implement project controls software

- Implementing a sophisticated, dynamic system can act as a catalyst to drive the organization and its employees to greater maturity

The Difficulties of Immature Processes

Project Management Maturity Model

Five Levels of Project Management and Project Controls

⑤ Optimized Processes

④ Managed Processes

③ Organizational Standards

② Structured Processes

① Initial Processes

FIVE LEVLS OF PROJECT MANAGEMENT

Level 1-2 Project Management Challenges

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① Initial Processes

Challenges

- Working from spreadsheets and stand-alone systems, with no project controls in place, and little to no procedural documentation.
- As companies at this level are primarily reactive in nature, the time required to set up and maintain a new system may seem like a poor investment.

② Structured Processes

Challenges

- Likely have disparate processes across functional and/or project teams.
- Difficult to view and manage how scope, cost and schedule interrelate.
- Project managers and teams may have their own processes, standards, and templates.
- Managers and employees may resist having to change their processes to align with others.

3   Organizational Standards

- Standards are documented, defined and consistent.

- Firm understanding of project management processes.

- Structure, training, and knowledge in place to support them.

- Some technical training, but limited knowledge transfer.

Benefits of Driving Maturity through Software Adoption

The introduction of a robust, **pre-made** system can act as a catalyst and supports the changes required to achieve Project Management maturity

- How?
  - Multi-disciplinary Committee to plan training / implementation
  - Having an Executive Champion
  - Committing time and money to the implementation promotes standardization
  - Adopting a phased approach of introducing rules and standardizations as new projects are launched
  - Access to knowledgeable & experienced implementation team

The introduction of a pre-made, robust system can act as a catalyst and supports the changes required to achieve Project Management maturity

- How?
  - Inherent functionality and capabilities in a pre-made solution used to monitor the adoption of the new processes and procedures
    - Software training, documentation and support introduces industry best practices
    - Reduces manual labor and administrative tasks
    - Improves data integrity and integration with business system topography

Implementation of a Robust, Pre-made Software Solution to Provide the Greatest Benefits

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Project Controls EXPO
Melbourne, Australia

Two Actions Required:

1. Select the right software

2. Plan for a phased implementation

Things to Consider:

- **Pre-made**
  - All functionality is available off-the-shelf
- **Scalability**
  - Able to scale up or down with needs of the organization
- **Robustness**
  - Fulfills both current and future needs
  - Designed to support industry best practices
- **Intuitiveness**
  - Easier for staff embrace
- **Flexibility**
  - Option to use features when they are required

Plan for Phased Implementation

Implementation should be phased to reflect the company's current level of maturity, its ideal end-state, and its required timeline.

Recommended Practice:

- **Start with a Discovery Phase**
  - Better understand current maturity level of the organization
  - Overcome key struggles
  - Capture any documented or undocumented processes and procedures
  - Vendor implementation team can recommend coding structures
  - Vendor implementation team documents processes and procedures

Recommended Practice:

- **Replicate the Current State**
  - Import current data into the new project controls software to enhance employee confidence
  - Allow differences to exist between projects, until one standard method is determined
  - Show how finance and scheduling data will interrelate

Recommended Practice:

- **Onboard One Project at a Time**
  - Use a Pilot Project as a proof of concept
  - Helps to determine how to handle differences between project management and control methods
  - Existing projects:
    - Adjust the rules as they are on-boarded or
    - Do not on-board – implement the new project management software on new projects only

Recommended Practice:

- **Invest in Sufficient Training and Support**
  - For employees who lack familiarity with project management best practices and processes
  - Experienced implementation experts can walk employees through both the software functionality and the project controls fundamentals
  - Users gain a deeper understanding of the tool and learn how it can be better utilized at their organization
  - Makes employees more efficient

Recommended Practice:

- **Invest in Sufficient Training and Support (cont.)**
  - Includes an experienced training and support team
  - Familiar with all aspects of project controls including:

– Estimating Tasks and Projects	– Handling Progressing
– Coding Tasks	– Tracking Earned Value
– Creating Control Account Budgets	– Managing Funding
– Integrating the Schedule	– Managing Change
– Implementing Time Phasing	– Reporting
– Handling Actuals and Accruals	– Integrating with other legacy systems
– Handling Commitments	– Closing Accounts and Projects

  - Supports determining proper setup within the tool when it comes to rules, processes, and procedures

Recommended Practice:

- **Phase in Integrations**
  - Automate integrations over time
  - Consider using the software mapping features to map software accounts to other system accounts
  - Consider exporting from the other systems and then importing into solution, to improve the visibility of data

Recommended Practice:

- **Introduce Standard Reporting**
  - Pre-made solution can provide a series of standard, off-the-shelf reports for management use
  - Vendor implementation team can assist on report formats (tabular, graphical, dashboard, etc.)
  - Prior to customizations, implementing a few pre-made reports will be more efficient
  - Pre-made reports are particularly useful for immature organizations where management is unfamiliar with metrics

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Recommended Practice:

- **Have a Long-Term Implementation Plan**
  - To maximize the impact that software adoption has on the maturity of an organization
  - If capability to support Level 5 maturity exists, but the full functionality is never used, key opportunities are being missed
  - Plan for the implementation of any features, processes, and procedures that are not introduced during the initial implementation period
  - Call back implementation team or further training and support at agreed upon periods

Robust and Pre-made

PRISM Enterprise Reporting

PRISM Budgeting & Cost

PRISM G2 Engineering

PRISM Procurement

PRISM Contracts

PRISM Change Management

PRISM Integrator

PRISM Dashboard

PRISM Estimating

- Standard and configurable reports
- Export to PDF, Microsoft® Project, Microsoft® Excel
- Reduced set-up and drill-down time required
- Resource loaded cost and schedule
- Progress reporting
- Earned value across portfolio
- Time-phased budget and resource
- Estimate At Completion Analysis
- Productivity
- Physical Progress
- Executive Summary
- And more!

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Enterprise Reporting — Project Reporting — Schedule Interface

Cost — Cost • Schedule • Change
Engineering — Engineering • Equipment • Materials • Schedule • Change
Procurement — Procurement • Invoice • Costs & Materials • Schedule • Change
Contracts — Contracts • Invoice • Schedule • Change
Field — Projects • Schedule • Change
Docs — Document Access and Control
Integrator — Connecting Enterprise Financial Systems
Dashboard — Project Performance • Principals • Embedded KPIs
Estimating — 2D/3D/4D/BIM Takeoff

The PRISM Suite

Robust and Pre-made

PRISM G2 Cost Management

PRISM G2 Engineering

PRISM G2 Procurement

PRISM G2 Contracts

PRISM G2 Field

PRISM Docs

PRISM Integrator

PRISM Dashboard

PRISM Estimating

Conclusion

- Implementing project management software can help a business achieve the desired maturity level in a fast and efficient manner

- A proven, pre-made project controls solution can support better project controls and project management processes <u>at any level</u>

- A skilled implementation team and the functionality of a robust system can lead to smoother implementation as well as a greater level of adoption

- To promote increased maturity, choose a pre-made, scalable solution that is robust, intuitive and flexible at each level of project management maturity

- Use phased implementation plan to understand current maturity level, followed by slow, progressive increase in complexity until company has achieved maximum maturity

Thank You for Coming!

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