

KEYEDIN™ PROJECTS

PPM IMPLEMENTATION GUIDE

Utilising Keyedin Excellence to Provide a True Project Management Success Differentiator

Topics Included in This Guide:

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- Avoid the Big Bang Deployment
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- About Keyedin Projects

“Keyedin gave us the resource optimisation and workflow control we needed, in a package that became the firm’s change management tool. It served as a platform to relay how project management can organise and simplify everyone’s lives. Having project progress, project status, time allotment and financial information conveniently located in a single centralised reporting tool removes distraction from talent by making the necessary admin duties easy.”

Nicklefish

Introduction

According to the Project Management Institute, organisations surveyed reported averages consistent with 44% of their projects being challenged, late, over budget or reduced in scope, with an additional 24% considered failures, leaving only 32% categorised as successful. The lost revenue associated with these percentages, while undisclosed, is substantial to any company.

Project Portfolio Management (PPM) software is designed to reduce these shortfalls, providing functionality to improve the selection and execution of projects, programmes and entire portfolios.

KEYEDIN PROJECTS PPM BENEFITS:

- **Cloud-based, real-time visibility and cumulative reporting of project’s progression and financial status across programmes and portfolios**
- **Ability to optimise resources per project**
- **Engaging collaboration amongst those involved in each project**
- **Uniformity of time and expense data collection**
- **Strategic selection and planning of future projects adhering to the organisation’s goals**
- **Detailed reporting of all components of these functionalities**
- **Archival of all information per project; knowledge repurposing for future project planning, budget and resource estimating.**

But to take advantage of both these tangible and intangible benefits, organisations need to successfully deploy the enabling technology in the right way, focusing on the business benefits achievable in the short, medium and long term.

In this guide we explore a number of deployment tips that Keyedin Solutions has successfully utilised over the past 20 years, to ensure professional services organisations achieve a real success differentiator when implementing the Keyedin Projects Project Portfolio Management (PPM) solution.

Avoid the Big Bang Deployment

NASH TECH SOFTWARE

- KEYEDIN™ PROJECTS PPM AND PSA WERE INSTALLED IN GERMANY AND VIETNAM TO SUPPORT A STAFF OF 4500 IN THEIR OUTSOURCING DEVELOPMENT CENTRE
- STANDARDISED PROCESSES AND IMPLEMENTATION PERFORMANCE METRICS
- IMPROVED TRACKING AND RAPID MANAGEMENT REPORTING
- CMMI ACCREDITATION

Most significant to project portfolio management success is the start – PMOs who begin with a system configured to their specific needs realise the greatest benefit. That also presents the biggest challenge.

A collaboratively planned system involving both the organisation and PPM software provider, with best practice consulting and an all-encompassing implementation plan is necessary. This is the differentiator between a PPM system that staff utilise and the business benefits from, versus one available but not embraced.

This is never truer than in the project management office environment where:

- Project portfolios are subject to high levels of change, meaning the selected PPM solution must be intuitive, flexible and instil best practice. A structured implementation approach which focuses on the core features to necessitate immediate benefits is key to this success
- High growth levels in organisations result in constantly evolving project demands. An implementation approach structured around short, medium and long-term objectives will focus efforts and reduce implementation costs.

Planning entails analysis of needs specific to an organisation's individual business and culture, ensuring the proper Keyedin Projects features are activated, creating a tailored environment with easy-to-use, clutter-free capabilities needed today, with plans for additional functionality available as the company's growth evolves.

KeyedIn Excellence - the PPM Success Differentiator

KEYEDIN EXCELLENCE BENEFITS

- IDENTIFY THE BUSINESS'S CURRENT, PRESSING NEEDS – WHAT PPM FUNCTIONALITY IS NECESSARY NOW TO DELIVER IMMEDIATE BENEFIT
- ASSESS THE SUITABILITY OF A "MODEL BASED" APPROACH TO PROVIDE STRUCTURE AND REDUCE IMPLEMENTATION TIMESCALES
- OUR TRUE PROTOTYPING APPROACH DELIVERS THE "TO-BE" LIVE SYSTEM AT PROJECT KICK-OFF, ALLOWING REQUIREMENTS AND DESIGN TO BE JOINTLY EXECUTED ON THE ACTUAL SYSTEM, GREATLY IMPROVING UNDERSTANDING AND DELIVERY INTO LIVE OPERATION

Project portfolio management is complex, and while many good solutions exist, few providers have mastered a needs-based, organisational-wide implementation that balances ease-of-use with user adoption, business benefits, speed of deployment and cost effectiveness.

KeyedIn Excellence was born out of this need.

KeyedIn Solutions was motivated to set things right by creating an out-of-box, all-encompassing implementation plan that helps users achieve their specific PPM objectives right from the start.

Based on industry best practices and over 20 years' implementation experience, the KeyedIn Excellence proposition is designed to accelerate implementation timescales, providing the customer with:

- Requirements-based collaborative system planning
- Time-saving prototyped development ahead of launch
- Standardisation of processes for each function
- Reduction of project risk
- True knowledge transfer, thorough user training manifests user self-reliance
- Change management enabled, scaling the system and updating functionality accordingly
- Growth flexibility, additional functions available for use as business needs dictate

A key differentiator of KeyedIn Excellence over traditional consultancy approaches is involvement from day one. From your initial demonstration through to live implementation, a KeyedIn Excellence Consultant will be supporting you at every stage of the selection and implementation process.

Customer Success Stories

"We advocate incremental delivery as your organisation maturity increases - there's no point delivering a mature tool capability into an organisation still struggling to plan at a consistent level. This coupled with true knowledge sharing through our training and accreditation programme for your system administrators allows you to switch on new features when you are ready - without the need to involve us in further external investment if you don't want to."

Colin Gibbins, Director, KeyedIn Excellence.

The success of this balanced approach is highlighted through some of our recent implementations.

Customer	Approach	Project Timscale	Consulting Effort
Western Power	Model Based	5 Days	5 Days
Nene NHS	Model Based	2 Months	25 Days
Renaissance Strategic Advisors	Model Based	30 Days	10 Days

Through the unique approach of the KeyedIn Excellence team, coupled with our proven "Model Based" approach, each of these implementations yielded significant benefits for the end-user customer:

City and Guilds – delivered the Management Board with the information required to provide appropriate feedback to project managers, prioritise projects and to ensure key business priorities were being met. Established a process for measuring the realisation of benefits including setting the baseline, evaluating business cases, ensuring escalation and supporting exception reporting where appropriate. Developed an in-house 'Centre Of Excellence' for programme and project management, providing assistance in overall programme and project resource planning.

Western Power – Quick deployment, utilised the core components of the KeyedIn Excellence "Model Based" approach, creating a consistent, centralised reporting and tracking tool to provide accurate visibility into project status. Provided real-time Executive MI and Summary Reporting coupled with document management functionality, including visibility of all risks and issues, robust project status reporting and highly configurable summary reporting.

“True flexibility – KeyedIn Projects can mature as the client’s organisation matures – it can start simple and then have more functionally rich areas switched on when the client is ready.”

Colin Gibbins, Director, KeyedIn Excellence.

Nene-NHS – Utilised core components of the KeyedIn “Model Based” approach with 3 advanced components: Financial Management, Financial Benefit Tracking and Document Management, creating a consistent, centralised, reporting and tracking tool to provide accurate and excellent visibility into all projects. Provided real-time management reporting whilst streamlining key areas of the quality assurance process. Enabled Robust Project Status reporting and highly configurable summary reporting enabling the organisation to retire its previous manual project management processes.

Prairie Capital Advisors – Quick deployment of enhanced project functional and fiscal visibility with automated time and expense tracking. Integrated with Cloud-based financial accounting solution, Intacct and Salesforce CRM, for an optimally scaled service resource planning (SRP) solution.

Renaissance Strategic Advisors – KeyedIn Projects ensures the most capable consultant’s are allocated to the corresponding client projects, tracking key project parameters to objectives. KeyedIn Projects’ helped streamline the client billing process by collating the invoice data and providing the currency conversion required for integration with the firm’s QuickBooks financial management solution. Archived project data is available in a consistent format to assist future strategic planning and forecasting.

Encompass Solutions – Centralised, real-time visibility of all active projects – tasks, resources, budget versus actuals and profitability status. Metrics created to capture data on utilisation, budget tracking and comparison, culminating with profitability reporting by project and task type.

Discuss Your Requirements

If you would like to discuss the scope and potential timescales associated with implementing KeyedIn Projects in your organisation, call our team on +44(0)1274 863300, or email ondemand@keyedin.com.

From Evaluation to Implementation, Harness Support from KeyedIn Excellence at Every Stage

“KeyedIn Projects provided complete project management functionality, configured to firm's specific needs, creating an uncluttered, easy-use environment. Current project management and resource optimisation, as well as the firm's strategic planning and forecasting, was simplified through KeyedIn Projects' visibility of active and archived project documentation.”

Renaissance Strategic Advisors.

KeyedIn Excellences involvement begins during the prospective user's evaluation, where KeyedIn Excellence consultants assess the organisation's objectives and identify the solutions abilities to suit.

Unlike many conventional vendors, our SaaS business model enables us to give you access to the software at every stage of the selection process.

By having a KeyedIn Excellence consultant involved in the entire selection process from day one, we are continually reviewing your requirement which greatly eases the project initiation process and significantly reduces risk – allowing us to provide a full implementation brief on completion of the selection process, greatly accelerating the time from evaluation to implementation.

Our True Prototyping approach that delivers the "to-be" live system at the project kick-off, allows requirements and design to be jointly executed on the actual system, speeding understanding, agreements and delivery into live operation. With KeyedIn you can be learning from and improving the first live delivery while our competitors are still documenting your requirements and design.

Throughout the implementation process, deliverables are disseminated at the user's pace, planned for smooth rollout in tandem with the company's system administrator contact, assisting them in the coordination of a staff training plan, enhancing the solution's adoption and usage.

We advocate incremental delivery as your organisation maturity increases - there's no point delivering a mature tool capability into an organisation still struggling to plan at a consistent level. This coupled with true knowledge sharing through our training and accreditation programme for your system administrators allows you to switch on new features when you are ready - without the need to involve us in further external investment if you don't want to.

An Implementation Team Filled with Industry Experience

“KeyedIn Projects' system ability to both manage the firm's operation-side projects, and enable clients to manage key aspects of their projects. Collaboration within firm's staff, staff with clients, clients amongst themselves; KeyedIn Projects facilitated much-needed sharing of information.”

Encompass Solutions.

To get the most from your implementation, you need real world experience and a team that has experienced both the ups and downs of a real-world deployment – including the continued demands of a fully commissioned implementation.

With KeyedIn Excellence you get just that. Established and directed by Colin Gibbins, Colin previously evaluated, selected, implemented and maintained KeyedIn Projects as an actual KeyedIn customer. With over 2000 users, spread across multiple sites delivering both PPM and IT services, Colin's 20+ years' experience of KeyedIn Projects from the user angle, coupled with extensive internal experience has helped us build an implementation approach that truly includes industry experience, proven best practices, and lessons learned.

UK-US headquartered and globally entrenched, Gibbins' KeyedIn Excellence consulting team members have similar industry-user backgrounds. “I and many of my team are from the client-side – we bring experience of business and practical real-world experience to help make the right implementation decisions,” Gibbins confirmed. “These principles are at the core of our unique approach to delivery that allows us to confidently state that the implementation will be limited only by the speed at which you can marshal your internal resources to work with us.”

Getting all users on-board and using KeyedIn Projects successfully upon rollout, by simplifying the process and maximising usability of all needed functionality, are key objectives for the KeyedIn Excellence team.

Project Portfolio Management – Implementation Checklist

WHY CHANGE?

- IS IT WEB BASED, AVAILABLE TO THE WHOLE TEAM, 24X7X365?
- DOES IT OFFER MOBILE ACCESS?
- IS IT DIFFICULT TO EXTRACT MANAGEMENT INFORMATION IN REAL TIME?
- WILL THE SYSTEM GROW WITH YOUR BUSINESS AND ADAPT TO YOUR CHANGING REQUIREMENTS?
- HAS IT BEEN DESIGNED SPECIFICALLY FOR SAAS? IS IT EASY TO USE AND FAST?
- DOES IT INTEGRATE WITH SALES MANAGEMENT & FINANCE?
- DOES IT SUPPORT AND AUTOMATE COMPLEX BILLING REQUIREMENTS?

10 Tips for a successful Project Portfolio Management Implementation

Replacing your existing spread sheet based, home grown or non-integrated solution with a fully integrated solution like KeyedIn Projects may be more cost effective than you think. With our SaaS based licensing and rapid deployment model supported by the KeyedIn Excellence team, our aim is to provide a cost effective implementation, with software that delivers immediate benefit.

Here are 10 tips to get you started on the route to a successful implementation:

#1 Get a sponsor that cares

Someone who will use the system themselves and set a good example...and also break through internal politics to address the laggards and luddites that will always be there!

#2 Prototype to get it right

People need to touch, feel and experience the solution to really understand what it means!

#3 Don't automate something you don't understand

Building sophisticated Integrations, Workflows and Reports in the early stages is wasted time. Instead, wait until you understand how things are really going to work through experience of live running.

#4 Make it easy to get right first-time

Ensure the user experience is simple and slick, rather than having to put lots of effort in later with training and quality assurance checks for errors.

#5 You start from where you are, not where you like to think you are

Honestly assess your organisation's maturity and aim the solution at a reasonable level above that – rather than trying to implement everything at once. You will just leave people behind otherwise.

WHY CHANGE NOW?

- IMPROVE RESOURCE CAPABILITY PLANNING AND DEPLOYMENT
- BETTER SELECT AND PRIORITISE PROJECTS
- ENSURE PROJECTS ARE ALIGNED WITH CORPORATE GOALS, BUSINESS OBJECTIVES AS WELL AS YOUR SALES PIPELINE
- FOCUS ON THE 4 PROJECT SUCCESS FACTORS – PEOPLE, MONEY, DELIVERABLES AND BENEFITS
- STANDARDISE THE MANAGEMENT OF PROJECTS AND ENABLE COLLABORATION ACROSS PROJECT TEAMS
- REDUCE PROJECT ADMINISTRATION COSTS

#6 Use the solution to record agreements and support the work, rather than try to automate everything in workflow

Heavy workflow just encourages people to find creative ways around updating the system. You will not replace interactions and discussion outside the system...so just make them visible to everyone.

#7 Run the project...like a proper project

Don't assume this is "business as usual." It's not. The people-change side is probably more important as you are often dealing with Project Managers who are not used to being told what to do by someone else.

#8 Good is good enough

Perfection is very expensive and time consuming, so focus on getting the critical, important things working well enough first. Often those "bells and whistles" were never needed anyway.

#9 Focus on the actual implementation part of the project most

A difficult project can be made into a success by an excellent implementation – but the converse applies too! Invest in training, communications and floor-walking/contact-at-live to make sure it lands as expected.

#10 Multi-skilled Implementation Consultants

Ideally find one that can work end-to-end, reducing hand-offs, misunderstanding and providing instant responses. That's what we do!

Try KeyedIn Projects Today

Transform your PMO today with a free, 15 day trial. For more information, call our team on +44 (0)1274 863300, or email ondemand@keyedin.com.

About KeyedIn™ Solutions

KeyedIn Solutions is focused on helping organisations simplify processes, improve performance and drive results. The company's Cloud-based software systems not only offer greater flexibility, but effectively scale as business needs dictate and can be implemented quickly, delivering a measurable ROI months, or even years ahead of on-premise systems. And KeyedIn offers a true SaaS model, making its solutions affordable for every budget.

KeyedIn Manufacturing is an ERP system that helps custom manufacturers work smarter so they can increase productivity and bring new products to market quickly, for a distinct competitive advantage. KeyedIn Projects, the company's project management suite, helps businesses and professional services organisations improve everything from project initiation to execution by managing programmes based on top-line strategy and delivering profitable projects to the bottom line. And when new solutions need to be developed quickly, KeyedIn clients turn to KeyedIn Flex, the company's rapid application development (RAD) platform for affordable applications designed just for them.

When businesses need results fast, they look to the Cloud – and turn to KeyedIn Solutions. You should too. Keep up with us at www.keyedin.com



Part of the KeyedIn Solutions Business Portfolio



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