



Enterprise Project Management: A Seven-Step Process for Connecting Business Planning to Project Delivery

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Agenda

- I. What is Enterprise Project Management (EMP)?
- II. Levels of Responsibilities in EPM
- III. Change Management in EPM
- IV. Roles & Responsibilities in EPM
- V. Seven-Step Process for Connecting Business Planning to Project Delivery
- VI. After Implementation
- VII. Q & A

Enterprise Project Management (EPM)

Enterprise Project Management (EPM) is the most effective business discipline and system for guiding your organization to deliver your business plan. EPM is based on the principle that your organization's vision, mission, and objectives are a set of projects.



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Enterprise Project Management (EPM)

- EPM is a shift that is both technical and cultural.
- We will provide you with a seven-step process for your organizational shift to EPM.



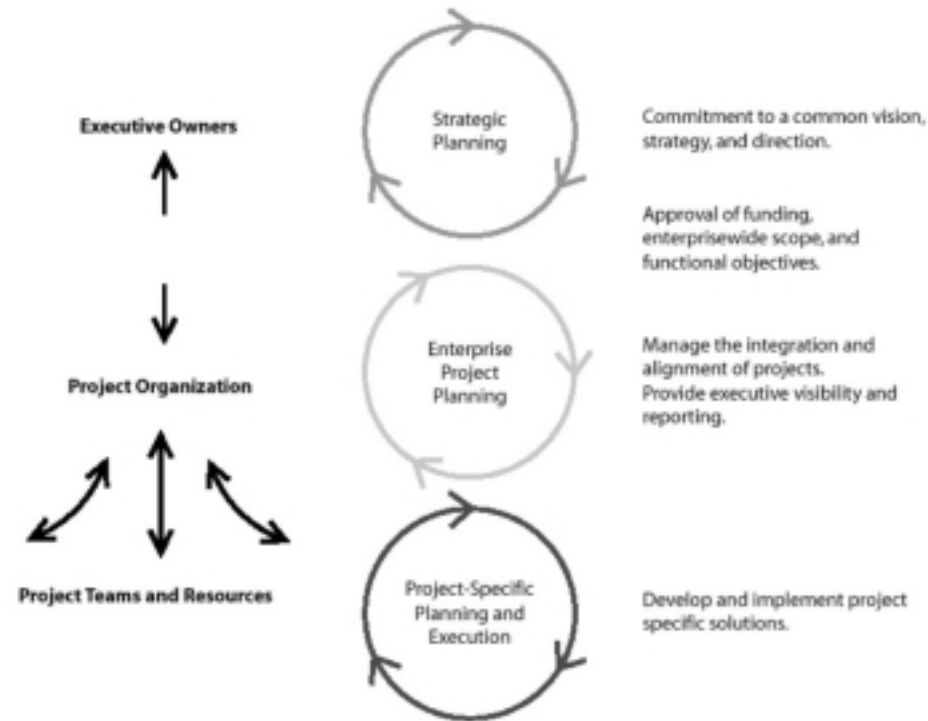
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Four (4) Levels of Responsibility in EPM

1. **Executive Ownership** - Responsible for establishing the vision, mission, and goals of the organization.
2. **Sponsorship** - Responsible for translating the vision, mission, and goals into tangible objectives to be pursued as projects.
3. **Project Organization**- is the steward of project success.
4. **Project Teams and Resources** - represent the functional and technical resources who plan and execute activities to deliver in accordance with organizational objectives.

Levels of Responsibility in EPM

Exhibit 1. Planning and Execution through Different Levels of EPM Organization

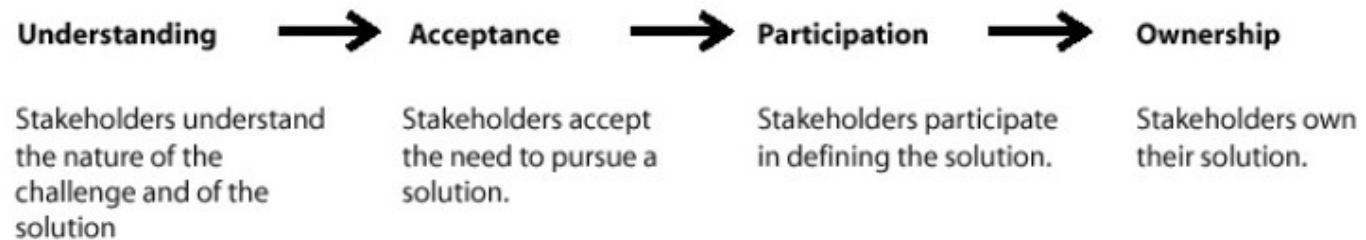


The Cultural Shift

- An organization's culture is the product of the interaction between its people, vision, processes, and tools.
- The successful culture will have intrinsically used processes and tools that allow people to work together effectively in total alignment with the vision.
- An awareness of and focus on driving a cultural shift is critical to establishing enterprise project management processes and tools in an organization.

The Cultural Shift

Exhibit 2. The Path of the Cultural Shift



Design Expectations in the EPM Transformation

The most effective and easily adoptable solutions will emphasize:

- Participation in design by stakeholders
- Simplicity and fundamentals
- Scalability for more mature processes and tools in the future.

Roles and Responsibilities in Making the Shift to EPM

Executive Ownership

- must set the *vision* and *direction* for the organization's EPM solution, and must be an ardent *advocate* of the EPM vision and direction among

Sponsorship

- represents the *bridge* between the high-level vision and direction, and the day-to-day planning and execution to achieve EPM

Roles and Responsibilities in Making the Shift to EPM

Project Manager

- Has the *day-to-day* responsibilities of *leading* and managing the EPM project. This includes detailed planning, definition, and execution, along with communication and reporting.

Roles and Responsibilities in Making the Shift to EPM

Subject Matter Expert (SME)

- SME is the *key* to designing, implementing, and *ultimate ownership* of the EPM solution. SME's are people who are experienced with the detailed functions of the organization.

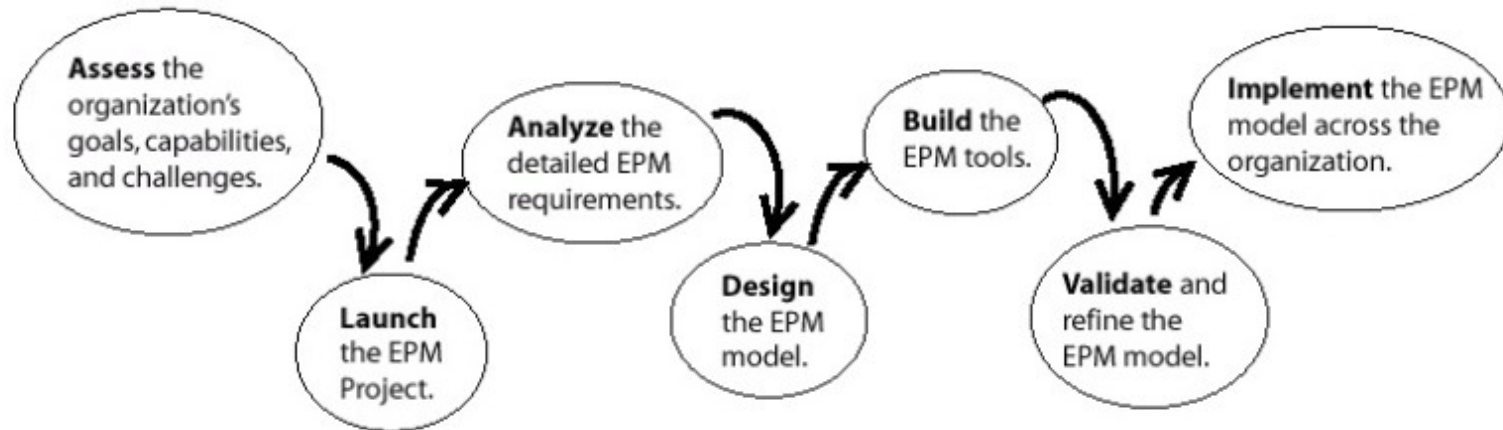
Roles and Responsibilities in Making the Shift to EPM

The Stakeholder

- There are stakeholders at all levels of the organization.
- The stakeholders are people who will be affected by the EPM solution.
- It is critical that stakeholder views are heard, evaluated, and addressed in the design and implementation of the EPM solution.

Seven-Step Process for Connecting Your Business Plan to Project Delivery

Exhibit 3. The Seven Steps to EPM



Step 1: Assess the Organization's Capabilities and challenges

- While the fundamentals of EPM remain constant, each organization will have its own unique needs and challenges to be addressed.
- The purpose of the assessment is to determine where the organization is consistently challenged and what type of solution will improve the situation.

Step 1: Assess the Organization's Capabilities and challenges (cont.)

Activities and Deliverables

- Evaluate the vision and mission of the organization.
- Identify recurring challenges to achieving that mission.
- Establish an EPM vision that can solve the organization's challenges.
- Determine the skills and resources needed to move to EPM.

Step 2: Launch the EPM Project

- Once Executives have a vision established, it is time to obtain commitment to move forward.
- The EPM project can be formally launched with an executive briefing session that outlines the vision and magnitude of effort in moving to EPM.
- Executive commitment is demonstrated by the allocation of key subject matter experts and other resources to the EPM project.

Step 2: Launch the EPM Project (cont.)

Activities and Deliverables

- Obtain executive commitment for moving forward.
- Acquire the skills and resources for the EPM project.
- Form and prepare the EPM project team.

Step 3: Analyze the Detailed EPM Requirements

This is the first step in transitioning from a high-level vision to a detailed.

Activities and Deliverables

- Define the constraints and boundaries for the EPM model.

Step 3: Analyze the Detailed EPM Requirements (cont.)

Activities and Deliverables

- Identify and prioritize requirements in the areas of:
 - Project definition, prioritization, and authorization from an enterprise perspective
 - Resource capacity planning and allocation
 - Project definition, planning, and scheduling from a detailed perspective
 - Communication, visibility, and reporting from both an enterprise wide and project-specific perspective

Step 3: Analyze the Detailed EPM Requirements (cont.)

Activities and Deliverables

- Evaluate and select EPM software and systems based on requirements.
- Validate with executives and other stakeholders that constraints, boundaries, and requirements are in alignment with the EPM vision and direction.

Step 4: Design the EPM Model

- This is the time when the pivotal role of the project organization and the mechanics of the EPM solution are defined.
- There are two areas of focus in the design phase:
 - improving or realigning existing processes, and
 - developing new processes based on EPM requirements.

Step 4: Design the EPM Model (cont.)

Activities and Deliverables

- Define EPM roles, responsibilities, and reporting relationships
- Design new EPM processes and/or redefine existing processes to an EPM context.
- Establish software configuration and business rules based on EPM processes, roles, and responsibilities.
- Validate alignment of the EPM process and tool design with the prioritized requirements.

Step 5: Build the EPM tools

- This is the point at which the EPM software and systems are installed and tested.
- The configurations defined in the design step are built into the system.
- The build step concludes when the EPM processes and tools are fully designed, built, and integrated.

Step 5: Build the EPM tools (cont.)

Activities and Deliverables

- Install hardware and software
- Configure software according to processes and business rules
- Validate integration of processes and tools
- Update documentation.

Step 6: Validate the EPM Model

The best way to prove the concepts is to test drive them using a select set of projects.

Working with a select set of projects provides an opportunity for the newly formed project organization staff to become familiar with their roles and responsibilities, while refining the EPM model.



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Step 6: Validate the EPM Model (cont.)

Activities and Deliverables

- Acquire and train core project organization resources.
- Select pilot projects and train their respective project teams.
- Execute pilot projects under EPM model.
- Refine EPM model based on successes and lessons learned.

Step 7: Implement EPM Organization wide

- An effective implementation approach is to truly projectize the business plan

Activities and Deliverables

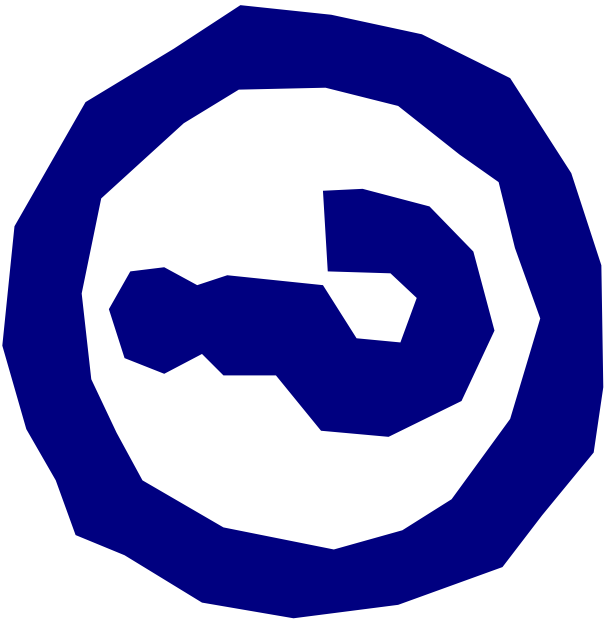
- Reaffirm executive commitment.
- Projectize the business plan.
- Train stakeholders and project teams as projects are launched.
- Provide follow-up support.

After the Implementation

- Develop strategies, plans, and budget in a continuous, proactive fashion.
- Define, initiate, plan, and execute projects in alignment with the organization wide strategy and budget.
- Prioritize and allocate resources in alignment with organization wide priorities.
- Provide consistent performance-to-plan measures, communication, and reporting for all of its projects.
- Establish a consistent project management approach for all divisions and departments.

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