

Welcome to our event

**The Value of Project and
Portfolio Management Systems
Part 1**

Clear Definitions

Project & Portfolio Management Systems(PPMS)

- **Portfolio** features support business case analyses of projects to properly prioritize and manage the costs, scheduling and resources applied to those projects.
- **Project Management** features support most foundational areas described in PEMBOK from the Project Management Institute. (PMIS)

Gartner

Agenda

- 1. Is your operation ready for a PMI System**
- 2. Doing the ROI for a PMIS for your company**
- 3. Criteria for selecting a PMIS**
- 4. Demo @task a PMIS industry leader**
- 5. Properly deploying a PMIS system**
- 6. Questions and Answers**

Are you ready for a PMIS?

1. Do you have more than one project active at a time?
2. Are you manually maintaining task completion in spreadsheets?
3. Do you have to have weekly project meetings that last for hours just to get everyone's status?
4. Are you tracking issues in a word document?
5. Are you manually calculating earned value?
6. Are you manually maintaining resource availability in spreadsheets?
7. Are you spending hours preparing status reports for upper management?
8. Do you have hundreds of Outlook folders with thousands of emails from your project communications?
9. Do you have hundreds of shared network drives holding thousands of project documents?

Typical problems without a PMIS

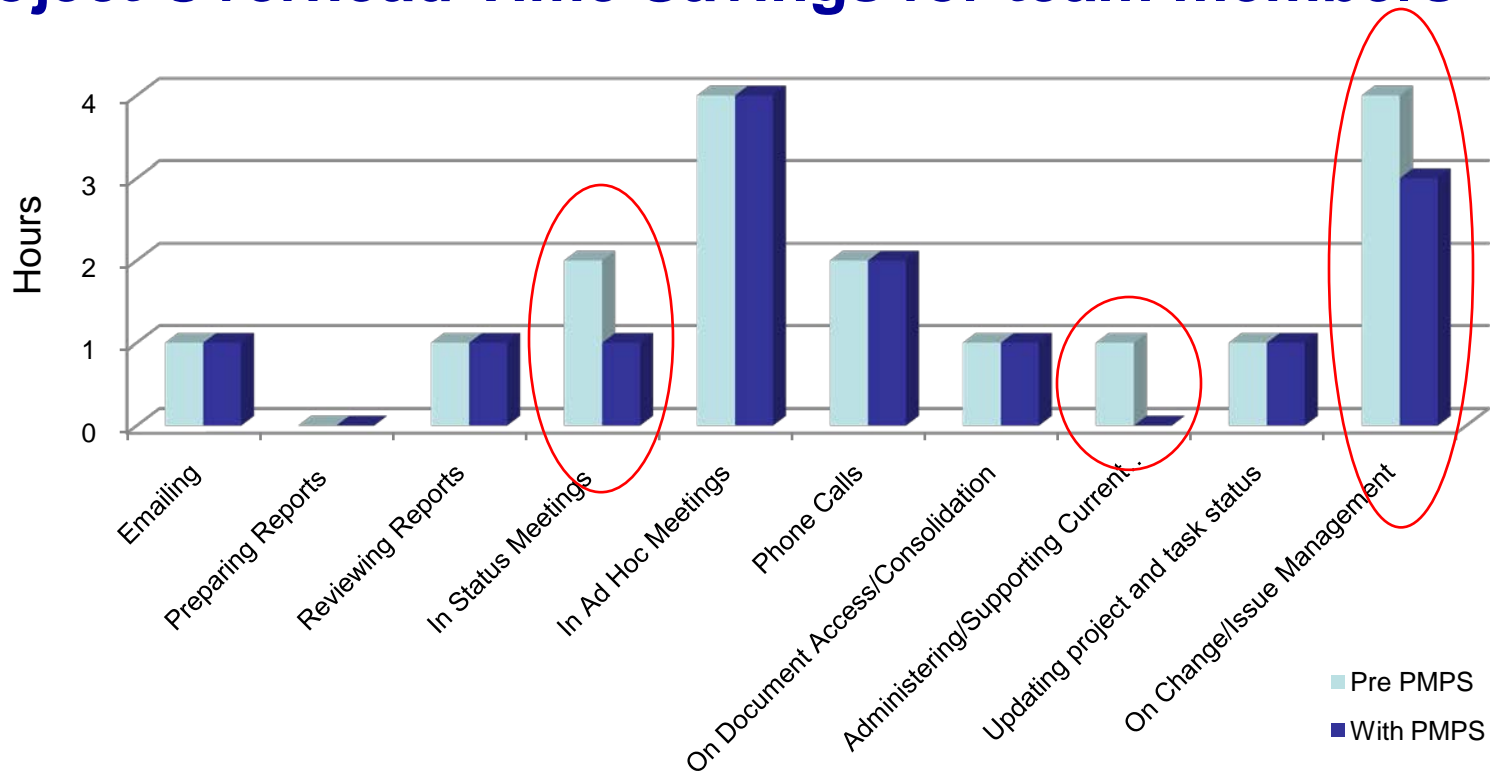
- 1. People using old versions of the project schedule, issue list or resource availability documents.**
- 2. Information is always dated, never current**
- 3. Team members can't find the message or document they need.**
- 4. External team members don't have access to the document or email repositories**
- 5. People hate project meetings and they waste too much time**

ROI for a PMIS

Assumptions

Project Team Assumptions	
Number of Team Members	40
Average Hours per Week Dedicated to Projects	40
Number of Project Managers	6
Average Hours per Week Dedicated to Projects	40
Number of Concurrent Projects per Project Manager	2
Project Personnel Cost Assumptions	
Average Team Member Annual Compensation	\$ 45,000
Average Project Manager Annual Compensation	\$ 75,000

Project Overhead Time Savings for team members

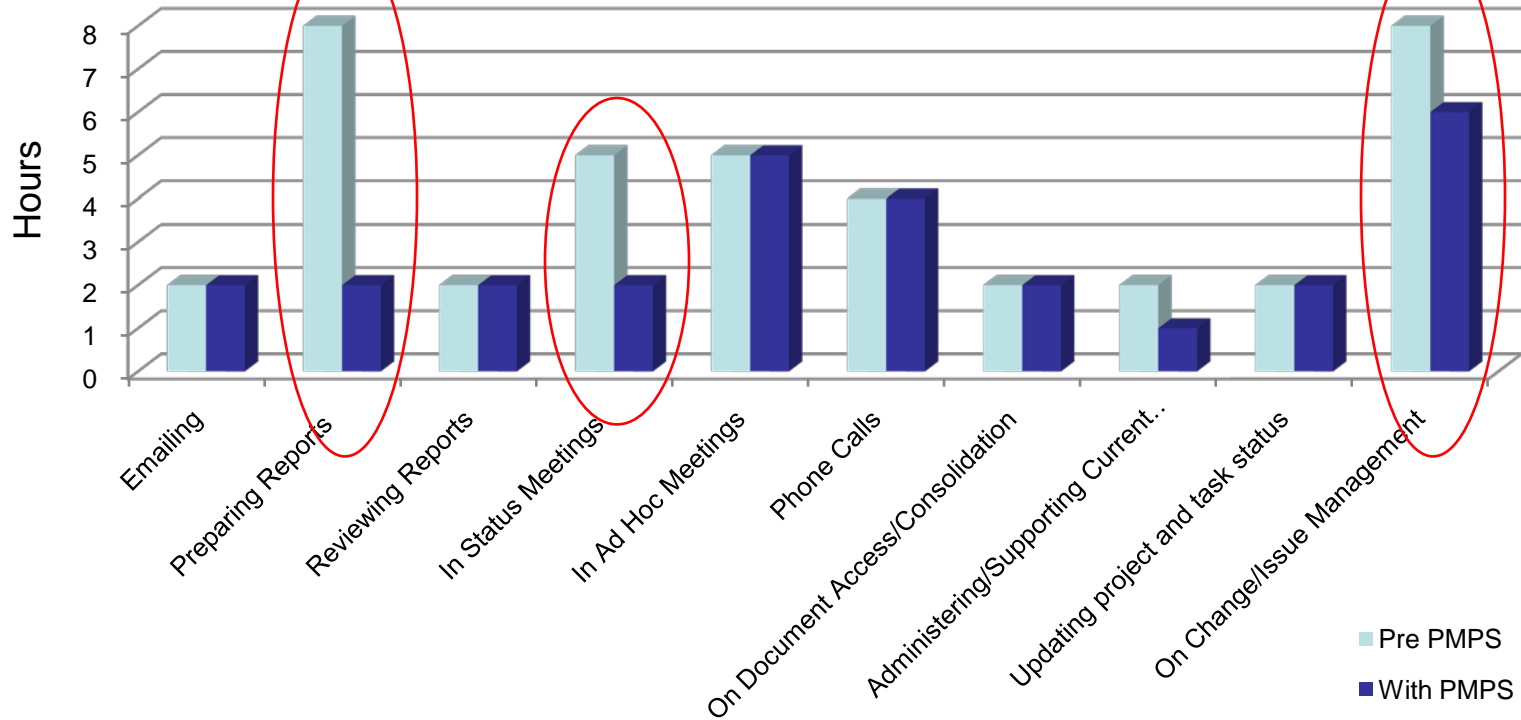


Team members go from 17 hours of Project Overhead to 14 hours.

A 13% improvement in time allocated to task work

ROI for a PMIS

Project Overhead Time Savings for Project Managers



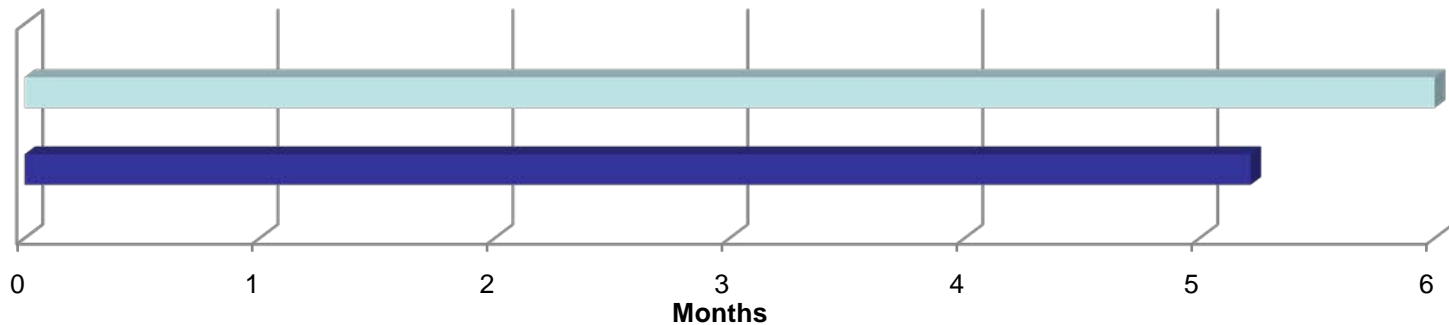
PM Savings of 30% @fully loaded cost of \$52,500/mo = \$15,750/mo

ROI for a PMIS

Cost Savings

Project Type Assumptions	
# Concurrent Revenue Generating Projects	6
Forecasted Profit per Month	\$ 5,000
# Concurrent Cost Reduction Projects	6
Forecasted Cost Reduction per Month	\$ 20,000
Average Project Length (Months)	6

Project Length



13% Savings based on Team Member productivity savings

- **\$4,000 per Revenue generating project**
- **\$16,000 per Cost Reduction Project**

ROI for a PMIS

Cost Savings

PPMS Gains	
Number of Projects per Year	24
Time Reduction in Project Length (Months)	0.8
Additional Profit per Project	\$ 4,000
Additional Cost-Reduction per Project	\$ 16,000
Additional Profit per Year	\$ 48,000
Additional Cost-Reduction per Year	\$ 192,000
Total Bottom Line Improvement per Year	\$ 240,000
Saved PM Costs per Month	\$ 15,750
Saved PM Costs per Year	\$ 189,000

PMIS SAAS Costs: \$30,000 per year Training: \$15,000 one time

Choosing a PPMS

Collaboration	Project Management	Portfolio Management	Usability
Discussion Threads	Task Management	Risk Analysis	Custom Reports
Project Notes	Task Feedback	Score Card Support	Custom Dashboards
Issue Tracking	Recurring Tasks	Budget Optimization	Outlook integration
Email Messages		Business Case Analysis	Intuitive Navigation
Document Management	Scheduling	Program Management	Context based help
	Project Calendars	Priority Setting	Performance
Resource Management	Constraints	Project Templates	Privacy & Security Settings
Resource Calendars	Dependencies		
Skill Sets (Roles)	Interactive Gantt Charts	Remote Capability	Help Desk
Timesheets	Critical Path	Web Based	Ticket request
Materials/Supplies	Re-planning / Recalculating	Multilingual	Ticket Management
Costs & Revenue		Desktop Client	Work Queue Routing
Groups (Resource Pools)	Reporting	PDA Support	Task/Project Conversion
Capacity Planner	Metrics (CPI, SPI, EV)		
Leveling	Work Load	Integration Capability	Support
	Financials	Custom Fields	Online User Manuals
	Scope Baseline and trends	API	Online Chat
	Milestones	Import/Export support	FAQs
	Automatic Notifications		Online Video Demo



Demo

The goal - Business Benefit

- You are not implementing Technology for technology's sake
- You are adopting new tools to improve your processes
- The bottom line must always be the primary objective

The Truefit Approach

Five Pronged approach to deploying new technology

- 1. Agile Methodology**
- 2. Just in Time training**
- 3. Process Improvement**
- 4. Change Management**
- 5. Sustainment**

Agile Methodology

- Start with the tool “Out of the Box”
 - You need to learn the tool before you can specify customizations
- Start with a core team and real projects
- Build customizations as you need them
 - Immediate feedback on effectiveness of the customizations

Just in Time Training

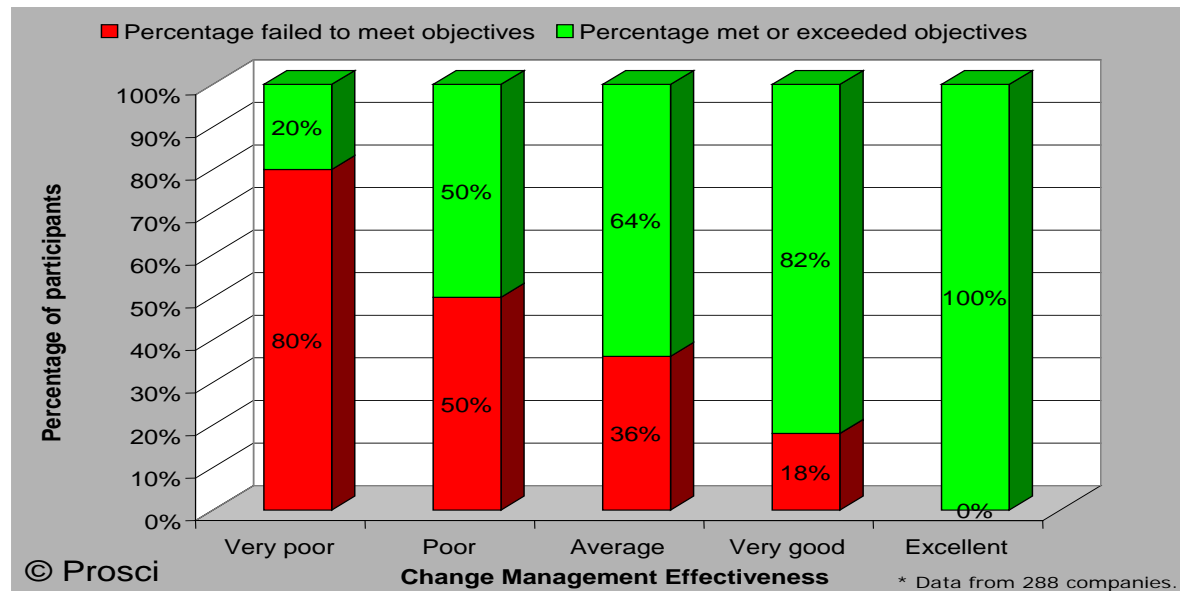
- Training everything up front is least effective
 - 70% is forgotten
 - You must use it to retain it
- Focused training around the project life cycle
 - Initiation, Planning, Execution, Closing
- Train users on the features they need only when they are ready to use them

Process Improvement

- We become team members of your project
- We serve as Project Coaches
- We facilitate project kick-off, planning & status meetings
- We bring sound project management practices to improve your processes and gain the most from a PPMS

- Dealing with the Human Factor
- Culture change happens one user at a time
- We assess your culture to create the right change management plan
 - Executive Sponsorship
 - Communications
 - Incentives
 - Ownership

change must involve the people
change must not be imposed upon the people



Unlocking the potential of your business to achieve excellence in project execution

- Sustainment doesn't happen by accident
 - People change roles
 - New people are coming on board
 - Sustainment requires an ongoing training program
- Train the Trainer
 - We show you the methodology
 - We leave you with the material
- We can support you into the future



Questions



Background

Unlocking the potential of your business to achieve excellence in project execution

- Founded in 1997
- Headquarters in Pittsburgh, PA
- Principle Centered Leadership
- Extensive Project Management and Technology Consulting experience
- Consistent Growth and Profitability
- National Customer Base



How we accomplish our mission

TrueFit's Vision:

To provide solutions that give businesses the power to reach their fullest potential and profit from their technology investments



Financial Services Manufacturing Entertainment *Diverse Markets* *Solutions Served* Retail Distribution Professional Services

Custom Development

- .NET Development (Custom Solutions)
- Portals & Information Workflow
- Business Intelligence
- Application Integration

Network Services

- Messaging solutions
- Core Network Infrastructure
- Network Security Solutions
- Thin Client Technology

Portfolio & Project Management

- OnPoint Assessments
- OnPoint Implementation
- OnPoint Project Consulting Services (PM Staffing, Training, coaching, Project Process Improvement)



What Does TrueFit Do?

- Provide expertise to enable your organization to excel in project execution
- Proven Change Management to drive rapid user adoption and achieve business results
- Leverage best of breed project management technology to achieve exceptional results

19% of Projects **Fail Completely**

46% of Projects are **Challenged and Do Not Meet Success Criteria**

65% of Projects are **Late and Over Budget**

“We change the statistics for your organization”



@task helps companies
get work done

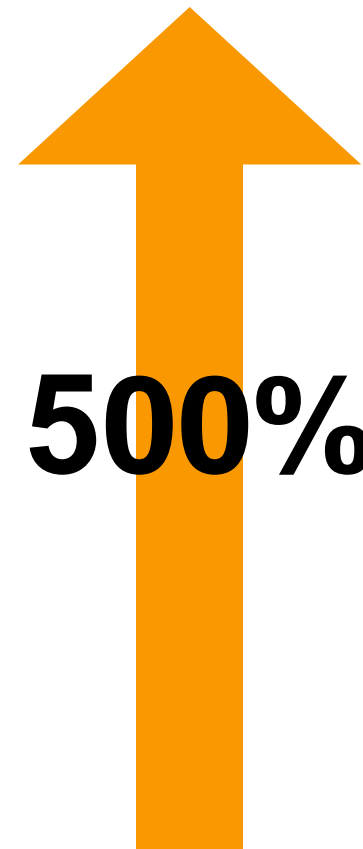




Company Overview

- Founded in 2001 in Orem, Utah
- Profitable Since 2003, Venture Backed
- 145 Employees
- 1,600 Customers
- Averaging 70 New Customers a Month
- Global—offices in US, Japan, China, and UK with partners throughout Europe, Australia, and South Africa

- Marketing Group at McNeil Consumer Health, produces point of purchase displays for Johnson & Johnson solutions
- **Goal:** Increase the number of annual projects completed while maintaining quality controls, Six Sigma, and SOX compliance
- **Result:** In first year with @task 300 projects were completed compared to 60 the previous year—a 500% increase





Industry Leaders Choose @task

Macy's • **Walt Disney** • Caterpillar • **Apple** • Library of Congress • **Google** • Novell
Louis Vuitton • **Whirlpool** • Time Warner • **Cisco** • San Francisco Chronicle • FAA
Raytheon • **Adobe** • NetFlix • National Institutes of Health • **NASA** • Mizuno • **GE**
Nielsen Media Research • **Toyota** • Greenpeace • **AT&T** • Smith & Wesson • Timex
Cotton • Northrop Grumman • ADP • McDonald's • **HanesBrands** • Quark • AAF
Wharton School of Business • **Chevron** • The Nature Conservancy • **Samsung**
Cardinal Health • Benjamin Moore • **Volvo** • US House of Representatives
• CBS • Abbott Laboratories • Grainger Global • **US Dept. of Health & Human Services**
HBO • **Johnson & Johnson** • Burton Snowboards • Ryder • **Amazon.com** • UCLA



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