



GUIDE

PPM Software Deployment Guide:

Preparing your organization for success.

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1. Abstract

Once the decision has been made and the best fitting project portfolio management (PPM) technology has been selected, the first obstacle an organization will face will be to keep up the momentum for improvement by moving forward with an action plan that will apply the knowledge acquired during the software evaluation process to the selected technology to ensure its practical and productive use in their own environment. For many organizations, the onus to successfully deploy enterprise software is typically placed on the chosen vendor. Although it is true that the vendor is the primary driver during deployment, the reality is even the best implementation team will fail if the customer does not take the necessary steps to prepare their team for the imminent changes ahead. PPM solutions are only as good as the people who employ them.

The fact is, a successful installation alone will only provide an organization with the vehicle for improvement and without customer commitment, more often than not, your PPM software investment will most likely turn into unwanted “Shelfware.”

In order to avoid “crashing before take off,” organizations need to recognize that they must prepare themselves for their new PPM solution. In this vein, the purpose of this white paper is to provide organizations with a detailed guide highlighting the steps necessary to prepare their teams for a **successful PPM software deployment** that will improve their visibility, processes and collaboration.

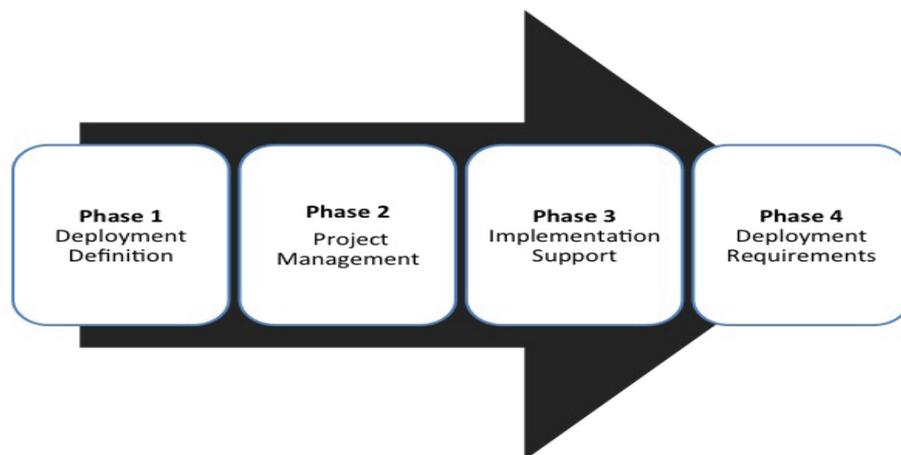


2. Deployment as a Project: It all starts with the plan

Rigorous planning of the deployment is the first necessary step an organization must take to position the new PPM solution on the right track. Along with the chosen vendor, the organization must define the deployment project plan, objectives and risks associated to change. The purpose of the plan is to reveal to the final end users what is involved, as well as begin the process of organizational buy-in that will lead to the ultimate goal of product adoption.

When developing a deployment plan it is critical that all phases of the plan are clearly defined and that the plan serves as the primary driver that will successfully guide the PPM deployment project. A comprehensive software deployment plan will include the following phases:

- **Phase 1** - Deployment Definition - the purpose of the deployment plan is to clearly define the overall objectives of the PPM technology and its application to the business. The definition process needs to involve all project stakeholders so that expectations are clear from the onset.
- **Phase 2** - Project Management - Once objectives are clearly defined, a detailed plan of the major tasks needs to be documented to effectively execute deliverables. This section of the plan is the roadmap for getting the PPM system up and running within the organization.
- **Phase 3** - Implementation Support - As part of the planning process, clearly defining the roles and training necessary for the involved stakeholders, along with material resources such as hardware, software, and documentation, will ensure that the deployment will be successfully achieved. At the same time, during this phase the deployment team can identify any missing gaps in support that can impede the deployment's progress.
- **Phase 4** - Deployment Requirements - In the final planning phase the project team develops a list of site specific requirements and acceptance criteria that the client and project team will agree upon. This final element of planning will establish an agreement among all parties so that expectations are defined and met.



In the final analysis, the objective of the deployment plan is to build a blueprint for success that is aligned with the corporate objectives and vendor expectations. If the plan is carefully laid out and the right parties are involved in its development, the process of building the plan in itself can be an extremely effective tool in solidifying successful product adoption.

3. Requirements Gathering: Setting Expectations

It is not uncommon for organizations to set lofty goals during the evaluation process on what they seek to benefit from a new project portfolio management system. The fact is, once a solution is selected and a deployment plan is established, organization's quickly realize that in order to ensure adoption there needs to be initial "Quick Wins" by their end users to solidify the acceptance of the new system. In many cases, false expectations have severely hurt or killed many deployment projects before they have begun. For this very reason alone, the requirement gathering stage must be fully leveraged to ensure both implementer and customer are on the same page. The requirements gathering stage is the first step in building a partnership with the selected vendor to establish an agreed upon strategy to maximize the value of your PPM investment.

One of the most effective strategies in developing a successful deployment road map is to assess the project management maturity of the organization that will benefit from the new PPM system. A comprehensive maturity model typically evaluates the people, processes and technology in relation to the best practices defined by industry experts and leaders. Clearly gauging where the organization stands will enable both the implementers and users of the new system to identify what aspects of the PPM system will be quickly adopted and which ones will require more effort for success. The idea is to build an approach where the pain of change is significantly reduced while the power of the PPM system will be fully benefited at its appropriate time.

Following the maturity assessment, the implementation team can develop a requirements gathering document prioritized according to the organization's needs in a phased manner. This requirements document needs to act as a barometer to where the organization can expect to succeed. In addition, the requirements gathering exercise will guide both parties (vendor and customer) down a healthy communication path that will instill transparency and trust, building the necessary partnership for a successful outcome. The ultimate goal should be to finalize agreed upon deployment milestones between the implementer and customer satisfying the organization's goals from initial pilot to complete roll out.



4. Building the Deployment Team: Aligning People, Process and Technology

Once expectations and goals are agreed upon, the next step is to build a deployment team that includes all of the critical stakeholders that will drive the success of your PPM initiative. Effectively defining customer and consultant roles, as well as choosing the business sponsors and internal champions will ensure that the deployment project will deliver on its objectives. Moreover, the success of the deployment team will be dependent on its alignment with your defined project processes that will be addressed by the new system.

All successful deployment teams include representation from both the customer and vendor sides with well-defined roles. Moreover, the right team will facilitate the process of bridging the gap between the organizational needs and the technology that will improve the manner in which projects are managed and executed by the various stakeholders involved. It is critical that the deployment team be well-balanced, consisting of business sponsors, stakeholders and project managers on the customer side, and implementation consultant, technical support and account manager on the vendor's side. The goal is to build a reliable deployment team where the customer will provide the best resources committed to the project so that they can develop subject matter expertise throughout the lifecycle of the solution with the support of the vendor during and post deployment.

The fact is, developing a successful partnership strategy with the selected vendor will maximize the ROI on your purchased professional service days. Having the right deployment team in your organization will not only improve the deployment's chance of quick success, but will ensure that the consulting group for hire will deliver the best results leaving little room for misinterpretations or miscommunications that are typically the culprits for misalignment, delays and bottlenecks.



5. Preparing for Change: Increase your chances for success

Developing a change management strategy as part of your deployment project is as important as the actual deployment itself. A successful PPM deployment needs to move beyond the motions of installation, configuration and training, and needs to include a strategy that will encourage product adoption. Resistance to change and organizational hurdles need to be thought through so that the PPM system will fit both functionally and culturally within the organization. After all, ignoring the impact of change can potentially undo all the hard work you have invested in evaluating, selecting and deploying your new PPM solution.

The change management component of deployment focuses on the people side of the equation. The importance of managing change lies with the fundamental reality that we as human beings will resist change even if it will improve the way we work. Since PPM systems are only as good as the people who employ them, the purpose of developing a change management strategy is to assist in the painful cultural shift that is inevitable concerning product adoption of the newly introduced PPM technology. The bottom line is to align and promote the positive changes of the new PPM system with the current PPM challenges experienced by the organization.

A change management strategy needs to communicate and convince the end user that there will be light at the end of the tunnel. The message of change to an organization and its users should express some of the following positive outcomes that will be benefited from the new PPM system:

- Better alignment of organizational goals with project activities
- Enhancement of individual working experiences
- Improved quality of services for customers
- Improved transparency and visibility into project data
- Improved productivity and decline in wasteful project activities.

The idea is to effectively communicate and prepare the alignment of the positive impact resulting from a new PPM solution to the everyday challenges of each specific group of project stakeholders. When change is communicated correctly, the anticipated goal of the PPM system will be achieved.



About Genius Project

Genius Project was founded in 1997 to address a need for project management software for the IBM marketplace. Since 2008, the Genius Project solution has been offering a platform-independent SaaS and On-Premise project and portfolio management software (PPM). With offices in Europe and North America, supported by a global network of resellers, Genius Project is now enjoyed by over 93,000 end users and over 1,050 customers worldwide. Throughout its 15 year history, Genius Project has been recognized by IBM and has received numerous certifications and awards

Genius Project is not only a powerful project management software but also provides customers with the necessary expertise in project management best practices.

Dedicated to delivering the best Enterprise Project Management Software, Genius Project's mission is to make project managers' lives easier by improving project selection, planning, staffing, execution and tracking with easy-to-use and powerful project management capabilities.

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