Best Practices in EPM Tool Deployments
Andrew Lavinsky, PMP, MVP (Project)
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BEST PRACTICES IN EPM TOOL DEPLOYMENTS

Andrew Lavinsky, PMP, MVP (Project)
The Challenge
Common Approaches
Current Trends
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- Process
- Technology
- Organization

- 20+ Years of Experience
- Global Presence
- Regional Focus
- Microsoft & PMI Partner
- Created Portfolio Server (Acq. By MSFT in ‘06)
- Project Financial Server
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Monthly Archives: May 2011

Reporting with Gantt View Task Rollups (Part 3) – Using Group By Options
Posted on May 19, 2011 by Andrew Lavinsky

I figured I’d clean out my old queue of blog posts that I’d written but never published. This particular post was half written when 2010 came out, and was sidelined while I soaked up all of the new product goodness. ... Continue reading →

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Reporting with Gantt View Task Rollups (Part 2) – Milestone Reporting
Posted on May 18, 2011 by Andrew Lavinsky

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- April 2011 (12)
- March 2011 (10)

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- Admin
- BI
- Collaboration
- Events
The Challenge

Common Approaches

Current Trends
EPM Tools

Business Priorities

Enterprise Work Portfolio

Organizational Constraints
EPM Tools
Schedule/Cost Modeling Tools
Epistemological
Unconscious Competence
Conscious Competence
Conscious Incompetence
Unconscious Incompetence
Unconscious Competence
Unconscious Incompetence
Unconscious Competence
Conscious Competence
Conscious Incompetence
Unconscious Incompetence
Scope Management Plan

Define standard WBS structures.
Map WBS to reporting requirements.
Identify SDLC model selection approach.
Identify the CBS/WBS map.
Define internal resource costs.
Identify a cost estimating methodology.
Define cost tracking mechanism.

Cost Management Plan
Identify a duration estimating methodology.
Identify a project update methodology.
Identify a risk management methodology.
Scale process to project risk.
Avoid Bottlenecks

Scale process rigor to level of risk. Define multiple project types. Differentiate task/project tracking.
Estimate vs. Track

Decouple estimating and tracking. Map tracking requirements to the culture. Set realistic phased goals.
Set realistic improvement goals. Simply having a baseline may be good enough.
Match the pace to the culture.
Define realistic roadmaps: Inventory > Schedule > Cost.
Pull vs. Push

Vendors exist to help you sell the vision. There is no one best practice. Executive and user support is critical.
Plan Support

Clearly identify support roles.
Identify support process and structure.
Consider using support framework (ITIL/MOF).
Identify operational integration model.
Identify requirements.
PPM Tools

Constraint optimization requires constraint identification.
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