In This Session …

- This session will show you:
  - The components of Project Portfolio Management (PPM)
  - When to apply PPM disciplines
  - Core Portfolio Management concepts and typical tool features
  - Portfolio Management implementation considerations
Audience Survey

• **Raise your hand if you:**
  - Are following a formal Portfolio Management process
  - Are currently using a Portfolio Management tool/system
  - Are not using either but are considering it
  - Frequently have more work than resources and time will allow
  - Sometimes find your teams working on projects that don’t add significant value
  - Have difficulty getting clients or leadership to prioritize their requests
What We’ll Cover …

- Definitions
- Benefits of Portfolio Management
- Key Portfolio Management Concepts
- Typical Challenges
- Getting Started
- Portfolio Management Tools
- Wrap-up
Definitions

- **Project Management**
  - A project is *“a temporary endeavor undertaken to create a unique product, service, or result … with a definite beginning and end”*
    - Developing a Web site
    - Building a garage
    - Creating a new client service
  - Project Management is *“the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements”*
    - Subject matter expertise and business process knowledge
    - Estimating, budgeting, planning, scheduling, and controlling skills
    - Microsoft Project, SAP Project System, CA Clarity PPM, other tools
  - Project Managers typically:
    - Focus solely on the project vs. ongoing operations
    - Start out on smaller projects and graduate to larger scope/budgets
    - Have at least 3-5 years experience
Definitions (cont.)

- **Program Management**
  - A program is “a group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually”
    - Building a new fighter jet aircraft
    - Erecting a tall skyscraper
    - Sending robotic explorers to Mars
  - Program Management is “the centralized coordinated management of a program to achieve the program’s strategic objectives and benefits”
    - Aligning multiple projects to achieve program goals
    - Optimizing cost, schedule, and effort
    - Resolving resource constraints and issues via central governance
  - Program Managers typically:
    - Focus on higher level management and coordination of projects
    - Deal with large, complex program scope and budgets
    - Have at least 5 – 10 years experience
Definitions (cont.)

- **Project Portfolio Management (PPM)**
  - A Project Portfolio is:
    - Group of current/proposed projects or programs
    - May contain a variety of projects, some of which are unrelated
    - May be organization-wide or limited to a specific business unit
  - Project Portfolio Management is "the collective management of a project portfolio based on numerous attributes to maximize value and achieve specific organizational objectives"
    - Attributes usually include Cost, Time, Effort, Risk, ROI, etc.
    - Tools can range from spreadsheets to enterprise server products
    - Primary purpose is to evaluate, select, prioritize, and sequence projects to best align with and support business goals
  - Portfolio Managers typically:
    - Evaluate new ideas or projects proposed by sponsors
    - Score projects according to established metrics and weights
    - Summarize and communicate portfolio data to drive decisions
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Benefits of Portfolio Management

Are we doing the “right” things?

Are we doing enough of the “right” things?

Are we doing the “right” things “right”?

Achieving the Vision

- Shifting customer requirements
- Advent of new Technologies
- Change in Competitive Landscape
- Decrease in Capital available
- Economic Downturn

Strategy Alignment and Value Creation

Project Portfolio

Repeatable Assessment and Realignment

Time
Benefits of Portfolio Management (cont.)

- Gain visibility of your projects and programs

**The issues**

- **Project information is hard to collect**
  - No standardized way to document projects
  - Incomplete documentation
  - Non-centralized information
  - Projects at different stages of their life cycles

- **No portfolio view**
  - Project investments are unorganized. No framework, no tool, no time, no resource.
  - Too many projects or information to analyze
  - Programs reflect capital authorization instead of logical sequencing

- **Portfolio communication is inexistent**
  - Business is not interested
  - Unsure about what to communicate
  - No clear executive view of the portfolio and its business impacts
  - No business language to report about projects

**The propositions**

- **A standard form to collect project information and guide project managers through what they should document**

- **A logical grouping of initiatives in a project – program – portfolio hierarchy**

- **A single view of your current and proposed portfolio, which project, when, for how much, highlighting the financial impact and the payback period**
Benefits of Portfolio Management (cont.)

- **Align your investments with business objectives**

<table>
<thead>
<tr>
<th>The issues</th>
<th>The propositions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project value is hard to define</strong></td>
<td>A standard framework to identify all project impacts to balance sheet, income statement, and other business metrics</td>
</tr>
<tr>
<td>• Unable to scope projects to deliver the optimum value</td>
<td>My Objective: reduce COGS.</td>
</tr>
<tr>
<td>• Can’t measure where the portfolio will have the most impact on value</td>
<td><strong>My Portfolio</strong>: 65% of initiatives support revenue growth? Better start asking questions …</td>
</tr>
<tr>
<td>• No link between portfolio and business metrics</td>
<td>A clear categorization of your investment types, allowing alignment to business objective (innovation, growth, productivity, maintenance), and with an adapted business case to reflect project diversity and allowing comparison and prioritization</td>
</tr>
<tr>
<td><strong>Projects performance targets are unset</strong></td>
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<tr>
<td>• Measurement is different for each project</td>
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<tr>
<td>• Hard to capitalize on project process maturity</td>
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<tr>
<td>• Too many variables per projects to compare</td>
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<tr>
<td><strong>Business support is unclear</strong></td>
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<tr>
<td>• Unable to obtain clear sponsorship from business</td>
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<tr>
<td>• No business language to report department activities</td>
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<tr>
<td>• Can’t identify where the portfolio fails to support business</td>
<td></td>
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<tr>
<td>• Business roles and responsibilities are unclear</td>
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</tbody>
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**My Objective:**

- Reduce COGS.
Benefits of Portfolio Management (cont.)

- Make the right choices when prioritizing your investments

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<tr>
<td>• Projects can’t be compared</td>
<td>A value/risk matrix to clearly identify the projects with the more enterprise value and the less risk or complexity</td>
</tr>
<tr>
<td>• Investments underway are not the ones with the most value</td>
<td></td>
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<tr>
<td>• Projects types and benefits are too different</td>
<td></td>
</tr>
<tr>
<td>• Project prioritization process is unclear</td>
<td>A view of the planned benefits and their impact on the company for the next years, allowing you to control the portfolio’s execution and estimated impact on the company.</td>
</tr>
<tr>
<td>• Business Units don’t participate in project selection</td>
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<tr>
<td>• No common criteria to prioritize projects</td>
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<tr>
<td>• Investments can’t be justified</td>
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<tr>
<td>• Politics play a bigger role than business value</td>
<td></td>
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<tr>
<td>• Incomplete or non-existent financial data</td>
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<tr>
<td>• Undocumented benefits</td>
<td></td>
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<tr>
<td>• Difficult to justify some types of projects</td>
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</tbody>
</table>
Benefits of Portfolio Management (cont.)

- **Enhance your ability to execute**

  **The issues**
  
  - **Unable to adapt to changes**
    - Impossible to kill sick projects
    - Portfolio does not follow changing objectives
    - Business case evolves, but projects are not re-assessed
  
  - **No continuous view of the portfolio life**
    - Conflicting projects occur
    - Redundancies, double counting benefits
    - New opportunities at mid-year aren’t considered
  
  - **No integration with the other processes**
    - Program management vs. Six Sigma
    - Portfolio management and strategic planning process vs. budgeting activities
    - Continuous reviews vs. PMO gates

  **The propositions**
  
  A rolling execution process to monitor and maintain portfolio alignment and objectives.
  An ability to compare and prioritize projects of different lengths, styles, status at any stage of their execution.

  A consistent framework to integrate all your existing standards and approaches into the **Managing for Value** responsibilities.

<table>
<thead>
<tr>
<th>Policies and Standards</th>
<th>Roles and Responsibilities</th>
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<tbody>
<tr>
<td>Methods &amp; Approaches</td>
<td>Tools and Enablers</td>
</tr>
<tr>
<td>Organizational Structure</td>
<td>Deployment and Monitoring</td>
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Benefits of Portfolio Management (cont.)

- Analyst surveys report significant benefits to PPM
  - IDC Survey 9/2008
    - 13 large companies
    - Multiple industries
    - All using one or more PPM systems from CA, Microsoft, Compuware, or SAP
      - Number of projects managed increased 35%
      - Cost per project was reduced 37%
      - Redundant projects dropped 78%
      - IT staff productivity increased by 14%
      - Project failure rate dropped 59%
      - The total annual benefit per 100 users is $83,500
Benefits of Portfolio Management (cont.)

- Analyst surveys report significant benefits to PPM (cont.)
  - Forrester ROI of PPM Tools 5/2009
    - PPM user survey
    - Multiple customer interviews
      - Project failures decreased by 15%
      - Cost overruns decreased by 10%
      - Project durations decreased by 10%
      - Low value or redundant projects identified: 10%
      - Manager’s time spent on admin duties decreased by 25%
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PPM as a leading practice

PPM allows organizations to improve decision making and maximize use of available resources to help address the symptoms of change.

Manage results:
- What are the ‘right’ things to do?
- Are we doing the ‘right’ things?
- Are we doing enough?
- Are we getting the results we want?

Manage resources:
- Do we have the optimal resource mix?
- Are we doing the ‘right’ things ‘right’?
- Are we maximizing efficiency?
PPM Components

Demand Management
- Receiving, evaluating, and deciding upon the execution of work requests.

Project/Program Management
- Managing and controlling project progress, resources, risks, issues, financials, scope, and quality.

Results Management
- Managing, tracking, and reporting project results in comparison to the approved business case.

Portfolio Management
- Ongoing management of the overall portfolio, constantly reassessing and improving processes.
Key Portfolio Management Concepts (cont.)

- Each level of PPM has specific objectives and tasks

**Portfolio Management** has primary focus on:
- Translating business strategy into manageable initiatives (programs/projects)
- Managing and tracking the portfolio of initiatives
- Regular “checkpoints” at which the benefits and results of the initiatives are reviewed to understand their impact on the realization of the business strategy

**Program Management** focus includes:
- Creation and management of key Program deliverables including business case and other baselined documents
- Identify, manage and address interdependencies between projects in terms of activities, deliverables and resources
- Program benefits tracking and realization

**Project Management** has primary focus on:
- Execution and delivery of planned project deliverables and milestones
- Management of project schedules, budget, issues, risks, and change requests using defined processes and tools
- Escalation of project issues, change requests and risks, where necessary
Key Portfolio Management Concepts (cont.)

- Projects continuously realigned with strategy as changes occur

Gather project information using a standard project template.

Assess the value and the risk of each program and produce a prioritized list of projects with suggested cut-offs.

Create a prioritized list of projects in compliance with constraints and thresholds.

Track changes in your external environment.

Generate reports to communicate your portfolio to executives and project managers.

Execute your portfolio based on the prioritized plan.

Periodically establish the baselines for the portfolio initiative (e.g. information requirements, performance measures, KPI baseline and targets and contingency management strategy).

Develop and weight value and risk criteria used in the prioritization process. Establish thresholds and constraints.

Develop the prioritization model.

Analyze Portfolio

Prioritize Project & Programs

Communicate & Report

Monitor Programs & Projects

Monitor Changes

Collect Project Information

Analyze Portfolio

Collect Project Information

Set up Portfolio

Deploy & Execute Portfolio

Track benefits, costs, resources, strategic alignment and more using a dashboard with health indicators for the portfolio, the programs and the projects.
Key Portfolio Management Concepts (cont.)

- PPM tools provide valuable support for major processes

Set up Portfolio  Develop Prioritization Model  Monitor Changes  Monitor Programs & Projects  Deploy & Execute Portfolio

- Determine your prioritization criteria and input constraints and thresholds
- Collect project data with standardized template
- Collect Project Information
- Analyze Portfolio
- Prioritize Project & Programs
- Communicate & Report
- Monitor the portfolio performance
- Determine most relevant costs and benefits for each project type with business cases

Consolidate information and produce reports to highlight key Portfolio and Project data in support of the prioritization process.
Key Portfolio Management Concepts (cont.)

- **Cost/Benefit analysis** is critical when funding initiatives

- Total project needs to be clearly articulated including ongoing maintenance costs

- Special attention needs to be placed on ensuring that only real, tangible benefits are counted

- Tangible benefits stem primarily from increased revenue or cost savings driven by increased efficiencies or enhanced capacity/capability

- Many financial return calculations can be used to differentiate and prioritize investments
Key Portfolio Management Concepts (cont.)

- Risk/Value analysis is often part of the selection process
Key Portfolio Management Concepts (cont.)

- Projects can be mapped based on costs and overall value to spot opportunities

For many projects, the costs (red area) are greater than benefits (beige area). Sensibility Analysis evaluates impacts on share price. Most investment focus on reducing costs. Company's priority is to reduce Cost of Goods Sold.
Key Portfolio Management Concepts (cont.)

- Resource Demand vs. Supply reporting and Master Plan views are common

- Standardized data requirements for each initiative allow for multi-dimensional analysis
- Resource demand vs. supply analysis allows executives to determine available capacity, determine current needs and anticipate future demands
- An integrated “master plan” enables the management of project interdependencies and facilitates initiative sequencing decisions
- A combined look at both facilitates more informed resource utilizations decisions and enables maximization of available resources through understanding of the effects of moving workers from initiative to initiative
Key Portfolio Management Concepts (cont.)

- Project delivery and benefit tracking are critical to detect variance from plan
  - PPM is not just about supporting the up-front funding and resource allocation decisions
  - It is a continuous process of tracking progress, monitoring changes, and adjusting and balancing the portfolio accordingly
  - Sound governance, clear articulation of roles/responsibilities and a commitment at all levels of the organization are needed to be able to feed accurate and current information up to the executives, and cycle back decisions and corrective actions down to the individual project team level
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Typical Challenges

- There are many hurdles to implementing PPM
  - Cultural fear of metrics or visibility/accountability
    - Individuals can influence the scoring and selection process to increase buy-in and avoid over-committing
    - Visibility often results in additional support
  - Unclear vision/strategy
    - Identify a few simple business objectives
    - Seek clarification and build from there
  - Too many disparate business objectives or project types
    - Focus on common attributes
    - Consider simplistic but consistent scoring methods
  - Clients and leadership unwilling to prioritize
    - Lack of top-down prioritization is equivalent to delegation
Typical Challenges (cont.)

- There are many hurdles to implementing PPM (cont.)
  - No resources to staff PPM functions
    - Basic processes can be implemented by many resources
      - Project Managers/Controllers, COE Managers, Business Analysts, etc.
    - Consider outsourcing or SaaS model if budget allows
  - Too busy fighting fires
    - PPM will manage Demand/Supply ratios to level the work and resolve overload conditions
  - No PMO or organizational authority to drive PPM across business units or COEs
    - Start with a single business unit, COE, or team
  - Insufficient project management or inconsistent delivery
    - PPM will highlight issues and build support for resolution
Typical Challenges (cont.)

- There are many hurdles to implementing PPM (cont.)
  - Difficult to quantify overall value for many projects
    - Select fewer metrics initially
    - Focus on common attributes that are measurable
      - Hardware/Software Costs, Total Effort, # End Users, # Days To Deliver, Avg. Benefit/User, Risk Score, etc.
  - Difficult to measure resource capacity and allocation
    - Measure at a higher level
      - Deliverables or Phases vs. Tasks, FTE vs. Individuals, Days or Weeks vs. Hours, etc.
    - Use periodic review and estimation to update if necessary
  - No budget for PPM tools
    - You can start with simple processes and existing tools
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Getting Started

- **When to consider PPM**
  - Project funnel is backed up with delayed requests
  - Project scope is sometimes vague, unclear, or impractical with no clear benefit
  - Project management processes may be weak or inconsistent
  - Difficult and time consuming to obtain accurate project status
  - Many projects are late, over budget, or delivered with scope and quality issues
  - Resources are highly stressed, often citing severe workload and numerous competing initiatives
  - Clients complain that it takes forever to get any service or results
  - Leaders are reluctant or unwilling to prioritize, yet can’t resolve all the issues and conflicts
  - Project teams are told to “make it happen,” “do whatever it takes”
Getting Started (cont.)

- So … we have all felt the pain … but where to start?
  - The best approach will depend on your organization
  - Refer to PPM Maturity Models and Implementation Guides for planning
  - Quick and simple is often the best initial response
- Start with a 5-step approach
  - 1 – Define
  - 2 – Gather Data
  - 3 – Analyze
  - 4 – Prioritize
  - 5 – Act
Getting Started (cont.)

• **Step 1: Define**
  - Determine your boundaries, start small
    - **Business Unit, Client, COE, etc.**
  - Create a list to contain all active or planned projects
    - Include large efforts, service packs, and small maintenance
    - Add any new client or leadership requests, even if not fully defined
  - Use an existing tool many are comfortable with
    - **Microsoft Excel, Word, SharePoint, or similar**
• **Step 2: Gather Data**

  - Fill in basic metadata for management and reporting

    - **Client or Business Function**
    - **Project Name**
    - **Business Owner/Sponsor**
    - **Technology Owner/Sponsor**
    - **Project Manager**
    - **Start/Finish Dates**
      - *Requested or TBD ok*
    - **Required Resource Groups**
    - **Core Technology Components**
      - *Major indicators for grouping only*

  - Don’t get carried away, stick to the basics
Getting Started (cont.)

• Step 2: Gather Data (cont.)
  • Add short list of common attributes critical to assessing overall value and project success
    ▶ Benefit/Impact (brief statement or comment)
    ▶ Total Effort
      ▪ Measure in Hours, FTE, or Person Days/Weeks
    ▶ Total Duration
      ▪ Workdays, not calendar days
    ▶ Total Cost
      ▪ Might breakdown to Hardware, Software, Other
      ▪ If any labor is contracted then include costs here
    ▶ Complexity/Difficulty (numeric scale)
    ▶ Risk (numeric scale)
    ▶ Overall Value (numeric scale)
  • Estimate and categorize each project or request
    ▶ SWAG or POOMA ok
• Step 3: Analyze
  • Score projects with simple algorithm
    ▶ Effort + Cost + Risk + Duration + Value = Score
    ▶ High scores are better
  • Use weighting to calculate score:
    ▶ Total Effort
      ▪ 0-500 hours = Low (3)
      ▪ 500-2,000 hours = Moderate (2)
      ▪ 2,000-4,000+ hours = High (1)
    ▶ Overall Value
      (based on revenue generation/cost avoidance/# users)
      ▪ Minor, difficult to measure or quantify = Low (1)
      ▪ Moderate, some measurements available = Med (3)
      ▪ Significant, quantifiable and concrete = High (9)
Getting Started (cont.)

- **Step 4: Prioritize**
  - Add two core indicators
    - **Priority**
      - Reflects the level of true business need or urgency regardless of capacity, timeline, cost, etc.
      - Critical, High, Medium, Low or similar scale
    - **Forced Rank**
      - Numerical sequencing that determines the order in which projects will be initiated
      - 1.1, 1.2, 1.3, 2, 3, 4, etc. without duplicates
  - Review the list with clients and leadership to confirm
    - Take a completed draft with your recommendation based on initial scoring
Getting Started (cont.)

- **Step 4: Prioritize (cont.)**
  - Determine existing resource allocation and future resource capacity
    - Utilize time reports, project plans, or status reports to measure
    - If data is limited or unavailable then revert to periodic estimation
    - Provide a summary aligned with Resource Groups contained on the project list
  - Set target dates for projects based on Forced Rank and resource availability
• **Step 5: Act**
  - Initiate new projects according to Forced Rank value
    - Lowest value will be implemented first
  - Reserve resources for future projects based on target dates
    - Some projects with higher Forced Rank may be started sooner due to resource constraints
  - Monitor project status and update attributes as changes occur
    - Overall Score, Priority, Risk, etc. may change as projects progress
    - Consider placing projects on hold or canceling if needed
  - Update the project list and review with clients/leadership on a periodic basis
    - Focus on confirming active projects, scoring/ranking new projects, and updating target dates based on resource forecast
Getting Started (cont.)

**PPM Maturity Model**

- **Ad Hoc**
  - Unpredictable and poorly controlled
  - No formal procedures or plans for projects
  - Processes are not standard or managed
  - Little data availability

- **Planned**
  - Dependent on individual efforts
  - Informal or incomplete project mgmt. processes
  - Problems not documented or corrected
  - Data collection and analysis are informally conducted but not documented
  - Processes are partially recognized and controlled by project managers
  - Understands projects’ basic commitments
  - Processes are efficient for individual projects but not programs or portfolios

- **Managed**
  - Standard, consistent processes
  - Processes are more robust for systematic planning and control
  - Problems are identified and informally documented for project control
  - Data is collected across the organization for planning and control
  - Analyzed data is shared with project team to help them work together
  - Project teams consist of cross-functional resources

- **Integrated**
  - Processes measured and controlled
  - Information and processes are documented
  - Can plan, manage, integrate, and control multiple projects efficiently
  - Processes are well defined, quantitatively measured, understood, and executed
  - Process data is standardized, collected, and stored for analysis
  - Decisions are based on fact
  - Innovative ideas are pursued, tested, and organized to improve processes

- **Sustained**
  - Focus on continuous improvement
  - Continuously improve processes
  - Document and act on lessons learned
  - Problems are fully understood and addressed
  - Data is collected automatically and analyzed to improve processes

**Key Questions:**
- Where is the organization today?
- What is the desired state? When?

**Effectiveness**

**Portfolio**

**Programs**

**Projects**
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Portfolio Management Tools

- Many PPM solutions are available to automate and assist

- The technology behind a project portfolio management software solution is fairly universal – usually an application server, a central database and a Web server

- Vendors differ in the extent of features, reporting capability, collaborative functionality, queries, database structures and workflows that they have built into their tools

- The size of the organization and of the portfolio, and the maturity of the organization’s current project portfolio management disciplines, among others, are the key factors in determining which tool is right for you

- Document and prioritize your requirements based on early pilot effort and use these to score and select a PPM tool
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Lessons Learned

1. **Start with basic processes and common metrics, keep it simple**
   - Pilot until you have a proven process before expanding
   - Resist the tendency to add secondary and tertiary metrics that have little bearing on overall value and decisions

2. **Involve clients and leadership early, give them control**
   - Seek involvement, direction, and decisions first
   - Switch to awareness and confirmation if met with resistance
   - Sell the benefits of PPM by doing it!

3. **Avoid rushing to implement complex PPM processes or tools**
   - Build on pilot experience unless you are already far along
   - Use what works, revise or discard what doesn’t
   - Consider outsourcing implementation and tool support
Resources

- **Project Management Institute (PMI)**
  - www.pmi.org ➔ Standards ➔ Library ➔ Organizations
    - *Organizational Project Management Maturity Model (OPM3®) (Second Edition, 2008)*

- **Gartner**
  - www.gartner.com ➔ Insight For Your Role ➔ PPM (Sign In)
    - *Magic Quadrant for IT Project & Portfolio Management, June 2010*

- **Forrester Research**
  - www.forrester.com ➔ Search ➔ PPM
    - *The PPM Implementation Road Map (June, 2010)*
    - *The Forrester Wave™: Project Portfolio Management (December, 2009)*
7 Key Points to Take Home

- PPM is about doing the right things ... and delivering at the right time ... to yield maximum value and support for organizational goals
- Project metrics and attributes must be practical and measurable in order to succeed
- Client and leadership involvement is critical
- Portfolio must be continually monitored and revised to address gaps and maintain strategic alignment
- You can implement basic PPM processes and controls with little or no budget
- Modern PPM methods and tools offer significant value, although some challenges remain
- Keep it simple and resist the tendency to complicate
Your Turn!

Questions?

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