

# Today's Webcast Description



## Collaborative Project Management – A How-To Guide

- Many organizations have some project managers that are formally trained, perhaps with models like the PMI or Prince2, etc. However, the vast majority of people who manage projects are what someone recently called P-MBA's (Project Managers by accident!). It is not to say that these people are not successful or capable. They are simply not formally trained. The reality is most organizations do not have the budget or time to train project managers nor do they have a defined process or set of standards for project managers to follow.
- This webcast will present a practical and simple how-to guide for project managers that will provide the typical stages, steps and sub-steps involved in Collaborative Project Management. It also includes a bonus section on Project Management Leadership style. The approach presented will be invaluable for the new project manager who is not yet trained in the how-to's of project management. It will also benefit the experienced project manager who may wish to adapt the guide for use in training programs.

**Presenter:** Éamonn McGuinness, BrightWork

# Logistics for Today's Webcast



- Slide Deck & Webcast Recording download links tomorrow
- Questions and Answers
  - Impractical to take questions on the phone throughout—sorry!
  - Your phone has already been put on mute for now to avoid accidental background noise
  - We will answer questions at the end as follows:
    - i. From the Microsoft® Office Live Meeting question manager – Click the “Q&A” panel or click “Alt Q”
  - After the webcast - extra questions to [richardm@gig-werks.com](mailto:richardm@gig-werks.com) or [info@brightwork.com](mailto:info@brightwork.com)
- Remember to go to the “full screen” in Live Meeting (F5)

# Before Survey/Poll

- Does your organization have a documented guide / approach to Project Management
  - No
  - Yes – but it is not really useful or used
  - Yes – and it is useful

# SharePoint ISV Partner Ecosystem

## ECM

### ECM Interop

- OpenText
- EMC-Documentum
- IBM-FileNet
- Oracle-Stellent
- SAP

### Records Mgmt

- HP-Trim
- CA
- Unique World

### Transactional Content Mgt.

- KnowledgeLake
- NextDocs
- BlueThread
- Hyland
- Image Source
- Clearview

### Digital Asset Management

- Telestream
- Artesia
- Equilibrium

### Forms

- Tec-IT
- Kayentis
- Texcel

### LOB Integration

- Sitrion (SAP)
- ERP-Link

### Document Assembly

- Business Integrity
- Xinnovation
- Content Technologies
- MarkLogic

### Physical Records Mgmt

- OmniRim
- Iron Mountain
- Productiv

### Content Migration

- Casahl
- Tsunami
- Metalogix
- Quest

### Archiving

- Commvault
- EMC-Centera
- Hitachi Data Systems
- Network Appliance
- Allen Systems
- Mimosa

## Search

### Taxonomy Management

- Concept Searching
- Interse
- SchemaLogic
- Synaptica

### Query Enhancements

- BA-Insight
- Sinequa
- Q-Go
- Expert System

### Multimedia

- Coveo

### BDC Connectors

- BA-Insight
- Handshake Software

### Protocol Handlers

- Vorsite
- Handshake Software
- xmLaw

### iFilters

- Citeknet
- IFilterShop

## Technology Solutions

### Backup & Restore

- AvePoint
- CommVault
- Symantec – Veritas

### Replication

- NSI
- Synergy
- Infonic (iOra)
- Repli-web
- Neverfail

### Administration

- Quest
- echoTechnology
- Data Assist

### Offline

- Colligo
- Infonic (iOra)
- Digi-Link

### Workflow

- K2
- Nintex
- Skelta
- AgilePoint

### Social Computing

- NewsGator
- Telligent
- ConnectBeam
- Atlassian

### Security

- Trend Micro
- Symantec

### Translation Services

- Idiom
- IceFire

### Accessibility

- HiSoftware

### Governance

- Workshare
- Mimosa
- CA
- Securent
- ClusterSeven

### WAN Optimization

- BlueCoat (Packeteer)
- Cisco
- Certeon
- Citrix
- Synergy

### Mobile

- Formotus
- TrueContext
- Transpara

## Business Solutions

### Application Dev.

- Corasworks
- Bamboo

### eLearning

- IntraLearn

### CRM

- Relavis
- Portrait Software

### HR

- Nakisa

### Project Management

- BrightWork

### Legal

- XMLAW
- Workshare

### Utilities

- Flexnova

### Retail

- Red Prairie
- Cactus Commerce
- RPM Car
- Wincor Nixdorf

### Construction & Engineering

- AutoDesk
- Bentley
- Dassault
- PTC
- UGS

### Manufacturing Visibility

- Invensys
- Epicor
- OSISOFT
- ICONICS

### Healthcare

- Broadpeak

### Event/Response Management

- E-Sponder
- ESRI

### Real Estate

- Accruent

### FinServ

- Portrait Software
- FiServ

### Contract Mgmt

- C-Lutions
- Corridor Consulting

# *“Collaborative Project Management – A How-To Guide”*

*A Webcast Presentation of the Guide*

**Éamonn McGuinness, BrightWork**

[www.BrightWork.com](http://www.BrightWork.com)

# Collaborative PM Guide - Agenda

- Introduce the Guide
- Walk through the Guide
  1. Initiate the Project
  2. Plan and Setup the Project
  3. Work on the Project
  4. Track and Re-plan the Project
  5. Close the Project
  6. Project Management Leadership Style
  7. Collaborative Project Management Sites
  8. Exercise – Build Your Own Project Management Approach
  9. Ways to Feedback

# Introduction



- More initiatives than ever are now delivered as collaborative projects
- Project teams are staffed with smart Team Members
- Project sites with *some* of the project information
- P-MBA's (Project Managers by accident!).
  - organizations do not have the budget or time to train.
  - no defined process or set of standards
- Lack of guidelines / standards for the Project Manager
  
- Difficult for new Project Managers

# Intention

- Guide for Project Managers
  - Typical stages, steps and sub-steps involved
    - Section on Project Management Leadership style
- Intended Audience
  - Valuable for the new Project Manager
  - The experienced Project Manager
    - adapt for use when training in new Project Managers
- Not to replace formal project management training

*“I intended to give you some advice but now I remember how much is left over from last year unused.”*

George Harris (1844-1922), US Churchman and Educator,  
addressing students at the start of a new academic year.

# Project Management Approach

*“No plan of operations extends with certainty beyond the first encounter with the enemy's main strength.”*

Helmuth Karl Bernhard Graf von Moltke (1800 – 1891),  
Chief of Staff of the Prussian Army and Master Strategist

1. Initiate the Project
2. Plan and Setup the Project
3. Until the project is complete continuously:
  - Work on the Project
  - Track and Re-plan the Project
4. Close the Project

# The SharePoint Assumption

- Assumes that the Project Manager will be managing the project collaboratively with the team.
- Also assume that SharePoint (or some such collaborative tool) is available.
- SharePoint is free!

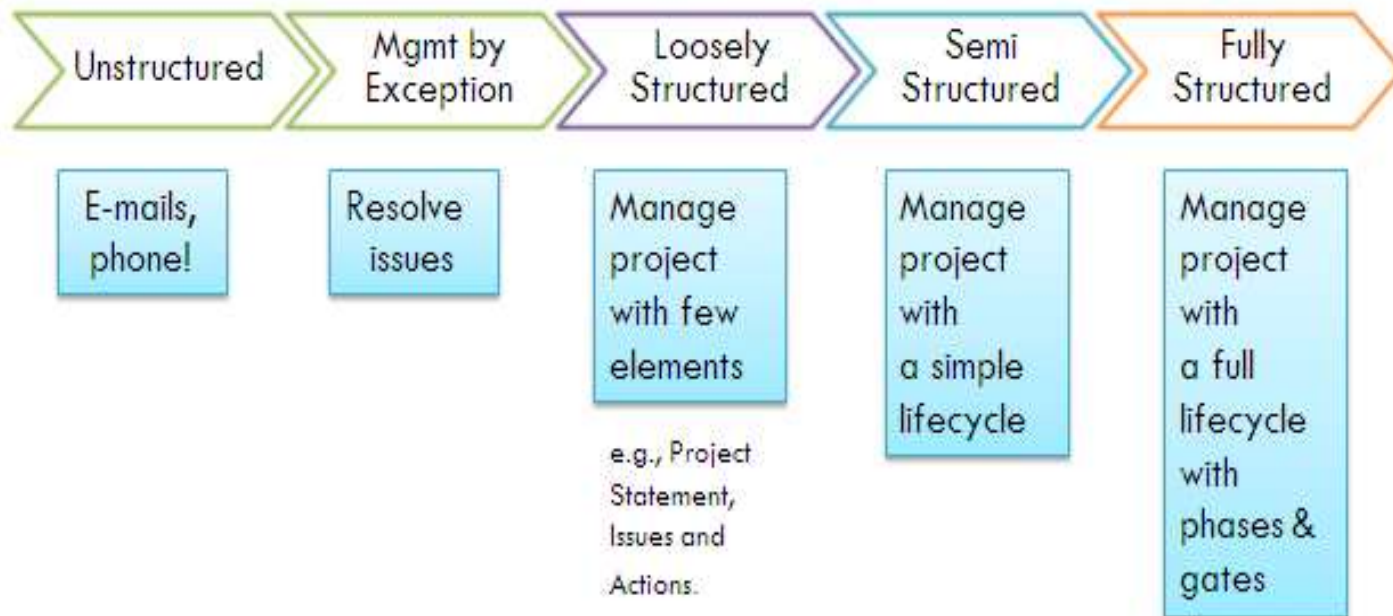
# (1) Initiate the Project

## 1. Get the Project

- Approved
- Sponsored
- Resourced

# (1) Initiate the Project

## 2. Decide the Project Management Process



# (1) Initiate the Project

## 2. Decide the Project Management Process

- Project Statement / Project Definition / Project Charter
- Team and Role and Responsibility Definition
- Goals
- Change Requests
- Action / Task list
- Formal Work Breakdown Structure
- Budgets and Costs
- Documents / Deliverables
- Risks
- Issues
- Meeting's, Agenda and Minutes and Actions
- Status Reports
- Contacts
- Discussions
- Decisions
- Emails
- Shared Knowledge
- Process and Procedures
- Lessons Learned

# (1) Initiate the Project

## 3. Create a Collaborative Project Site

Issue Tracker	Project Lite	Project Standard	Project Structured	Project Advanced
<p>View All Site Content</p> <p><b>Reports</b></p> <ul style="list-style-type: none"> <li>Project</li> <li>My Work</li> <li>Issues</li> </ul> <p><b>Tracking</b></p> <ul style="list-style-type: none"> <li>Project Statement</li> <li>New Issue</li> <li>Project Issues</li> <li>Project Deliverables</li> </ul> <p><b>People and Groups</b></p> <p>Recycle Bin</p>	<p>View All Site Content</p> <p><b>Reports</b></p> <ul style="list-style-type: none"> <li>Project</li> <li>My Work</li> <li>Work</li> <li>Issues</li> </ul> <p><b>Manage Project</b></p> <ul style="list-style-type: none"> <li>Project Statement</li> <li>Tasks</li> <li>Issues</li> <li>Documents</li> </ul> <p><b>People and Groups</b></p> <p>Recycle Bin</p>	<p>View All Site Content</p> <p><b>Reports</b></p> <ul style="list-style-type: none"> <li>Project</li> <li>My Work</li> <li>Work</li> <li>Issues</li> <li>Resourcing</li> </ul> <p><b>Plan</b></p> <ul style="list-style-type: none"> <li>Project Statement</li> <li>Project Goals</li> </ul> <p><b>Control</b></p> <ul style="list-style-type: none"> <li>Project Tasks</li> <li>Project Deliverables</li> <li>Project Issues</li> <li>Project Meetings</li> </ul> <p><b>People and Groups</b></p> <p>Recycle Bin</p>	<p>View All Site Content</p> <p><b>Reports</b></p> <ul style="list-style-type: none"> <li>Project</li> <li>My Work</li> <li>Work</li> <li>Issues</li> <li>Resourcing</li> </ul> <p><b>Plan</b></p> <ul style="list-style-type: none"> <li>Project Statement</li> <li>Project Teams &amp; Roles</li> <li>Project Goals</li> </ul> <p><b>Control</b></p> <ul style="list-style-type: none"> <li>Project Schedule</li> <li>Project Documents</li> <li>Project Issues</li> <li>Project Meetings</li> </ul> <p><b>Collaborate</b></p> <ul style="list-style-type: none"> <li>Contacts</li> <li>Discussions</li> </ul> <p><b>People and Groups</b></p> <p>Recycle Bin</p>	<p>View All Site Content</p> <p><b>Reports</b></p> <ul style="list-style-type: none"> <li>Project</li> <li>My Work</li> <li>Work</li> <li>Issues</li> <li>Resourcing</li> </ul> <p><b>Plan</b></p> <ul style="list-style-type: none"> <li>Project Statement</li> <li>Project Teams &amp; Roles</li> <li>Project Goals</li> <li>Project Change Req's</li> </ul> <p><b>Control</b></p> <ul style="list-style-type: none"> <li>Project Schedule</li> <li>Project Documents</li> <li>Project Risks</li> <li>Project Issues</li> <li>Project Meetings</li> <li>Project Status Reports</li> </ul> <p><b>Collaborate</b></p> <ul style="list-style-type: none"> <li>Project Contacts</li> <li>Project Discussions</li> <li>Project Emails</li> <li>Project Wiki</li> </ul> <p><b>Close</b></p> <ul style="list-style-type: none"> <li>Project Post Mortem</li> </ul> <p><b>People and Groups</b></p> <p>Recycle Bin</p>

## (2) Plan and Setup the Project

### 1. Plan the Project

- a) Complete the Project Statement
- b) Define and Allocate the Tasks
- c) Add the Other Project Artifacts Needed
- d) Assign the Work

*“The way to get things done is not to mind who gets the credit for doing them.”*

Benjamin Jowett (1817 – 1893)  
English scholar, essayist and priest

## (2) Plan and Setup the Project

### 2. Desk Check the Project Plan

*“If you would hit the mark, you must aim a little above it;  
Every arrow that flies feels the attraction of earth.”*

Henry Wadsworth Longfellow (1807 - 1882),  
US poet and writer

## (2) Plan and Setup the Project

### 3. Notify the Team of their Responsibilities

- a) Host a Project Kick-Off Meeting
- b) Enable your collaborative site with the facility to email notify on all new work assignments
- c) On your collaborative site setup an easy to find “My Work” reports / dashboards
- d) Setup scheduled emails with nudges for upcoming or late work.

## (3) Work on the Project

1. Find work
2. Do work
3. Update progress on work (recording any issues)

### (3) Work on the Project

*“I love deadlines. I like the whooshing sound they make as they fly by.”*

Douglas Adams (1952-2001) English Humorist

- [Monday] Review the latest plan and your personal commitments (via the dashboards or the automated emails)
- [Everyday!] Do lots of work and make great progress!
- [Late Thursday] Everyone makes a personal progress update and on tasks and issues in the project site (if not already done)
- [Friday at 10am] Weekly Team Meeting for 30 minutes

## (4) Track and Re-Plan the Project

*“There is nothing in this world constant, but inconstancy”.*

Jonathan Swift (1667-1745),  
Irish poet, essayist and cleric

### 1. Check and understand the project's progress

- a) Virtual Check
- b) Individual Check
- c) Team Check
  - Review, discuss and resolve (in so far as possible) any open issues
  - Look at upcoming tasks for next week
  - (time permitting) Look at tasks achieved last week or at least the highlight tasks from last week

## (4) Track and Re-Plan the Project

2. Find and Manage Exceptions (e.g. issues, risks and change requests)

*“Like all weak men he laid an exaggerated stress on not changing one’s mind.”*

William Somerset Maugham (1874-1965),  
English writer, dramatist and physician.

## (4) Track and Re-Plan the Project

### 3. Re-Plan the project

- a) Re-assign work and send notifications
  - Project Redefinition
  - Project re-assignments
  - Notifications
- b) Report to and Work with the Appropriate Stakeholders
  - Deliver Periodic Status Reports (Printed or emailed)
  - Raise exceptions including Project Change Requests, Top Issues and Top Risks
  - Resolve Sponsor Level Issues and apply the resolution through Re-Plan Project (if appropriate)
- c) Tailor the project site as needed

## (5) Close the Project

1. Close out the Project site
2. Run Project Post-Mortem and Track Lessons Learnt

*“It is a capital mistake to theorize before one has data”.*  
The Adventures of Sherlock Homes (1892).

3. Capture any useful modifications made to the project site for use on future projects


## (6) Leadership Style

*“There are no secrets to success: don’t waste time looking for them. Success is the result of perfection, hard work, learning from failure, loyalty to those for whom you work, and persistence”.*

Colin Powell (1937- ) US military leader

# (7) Collaborative Project Management Sites



Site Actions ▾  Browse Page

**pmPoint** Project Office (Internal Company PO)

Home Demo Center Templates Area Requests Area Contoso Projects Portfolios Area pmPoint Help

[Reports](#)  
[Projects](#)  
[My Work](#)  
[Work](#)  
[Issues](#)  
[Resourcing](#)

**Project Office**

[Project Statement](#)

[Sites](#)  
[Marketing \(PO\)](#)  
[Internal Projects \(PO\)](#)  
[IT \(PMO\)](#)

This rollup template is designed to facilitate reporting off multiple sub-projects.

**Project Summaries (Gantt)**

				Sep. 27, 2009 - Jul. 3, 2010					
				2009 Q4			2010 Q1		
				Oct	Nov	Dec	Jan	Feb	
<input type="checkbox"/>	<input type="checkbox"/>	<b>Title</b>	<b>Start Date</b>	<b>Finish Date</b>					
<input type="checkbox"/>	<input type="checkbox"/>	IT (PMO)	10/1/2009	2/28/2010	[Gantt bar spanning Oct 2009 to Feb 2010]				
<input type="checkbox"/>	<input type="checkbox"/>	Billing (ITPM wS)	10/5/2009	12/4/2009	[Gantt bar spanning Oct 2009 to Dec 2009]				
<input type="checkbox"/>	<input type="checkbox"/>	Report Definition Builder (ASM)	11/16/2009	1/4/2010	[Gantt bar spanning Nov 2009 to Jan 2010]				
<input type="checkbox"/>	<input type="checkbox"/>	Morocco (ITPM)	11/27/2009	2/4/2010	[Gantt bar spanning Dec 2009 to Feb 2010]				
<input type="checkbox"/>	<input type="checkbox"/>	Widget Campaign (CM)	12/1/2009	2/20/2010	[Gantt bar spanning Dec 2009 to Feb 2010]				
<input type="checkbox"/>	<input type="checkbox"/>	Hardware Upgrade (BPM)	12/2/2009	1/1/2010	[Gantt bar spanning Dec 2009 to Jan 2010]				
<input type="checkbox"/>	<input type="checkbox"/>	Office Move (WBS)	1/4/2010	2/4/2010	[Gantt bar spanning Jan 2010 to Feb 2010]				
<input type="checkbox"/>	<input type="checkbox"/>	Deploy pmPoint	5/13/2010	6/8/2010	[Gantt bar spanning May 2010 to Jun 2010]				
<input type="checkbox"/>	<input type="checkbox"/>	Ameko - Web Site (BPM wS)	5/13/2010	6/30/2010	[Gantt bar spanning May 2010 to Jun 2010]				

# Successful Customer Stories



Work and Project Management on SharePoint

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- Success Stories
- Deployment & Training
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## Customer Success Stories

## Case Study

An unwavering focus on satisfying the project management needs of our customers is the cornerstone of BrightWork's business philosophy. BrightWork measures its success in only one manner, its ability to ensure its customers success in meeting organizational objectives and improved operational outcomes.



*"The ability to customize the Gantt chart in pmPoint version 8.0 is a real bonus and combined with the new report editor makes this a great choice as a Portfolio Management tool."*



*"The BrightWork solution developed for Allscripts has been a key element in the success of our new "READY" program. It has taken our company a quantum leap forward in customer collaboration and communication."*



*"At AmSurg, we were looking beyond project management to a tool and resource that would enable collaboration, project management and performance management. With Brightwork pmPoint, we found that solution which will enable us to initiate, plan and execute enterprise projects through our project pipeline."*

Summary of Benefit

Webcast / Demo

## (8) Exercise - Build Your Own Project Management Approach

*“What we have to learn to do, we learn by doing”.*

Aristotle (384 – 322 BC), Greek philosopher

# (9) Feedback and Trial

1. Download and read the guide and give us feedback please!
  - On the blog [www.manageprojectsonsharepoint.com](http://www.manageprojectsonsharepoint.com)
  - email [cpm@brightwork.com](mailto:cpm@brightwork.com)
  
2. Build a Trial Project Office in the TrialZone
  - Download the [Getting Started Guide](#)
  - Sign-up for your [Sandbox site](#)
  
3. Call BrightWork today for a personal demo specifically designed to your project management approach

Web [www.brightwork.com](http://www.brightwork.com)

✉ [info@brightwork.com](mailto:info@brightwork.com)

☎ Europe/Int'l +353-91-514-492

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# After Survey / Poll

- Did you find this Guide / webcast helpful?
  - Not really!
  - Yes – and I will use some of the ideas for my projects
  - Yes – and we could use this as the basis of a guide we might use on the projects of our group

# Q&A



## i. First – Online

- In Live Meeting, click “Q&A” panel or “Alt Q” to open the Question Manager

We’d love to hear more detailed feedback on this guide  
email ... [cpm@brightwork.com](mailto:cpm@brightwork.com)

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