7 Ways To Leverage SharePoint 2010 For Project Management Success

Dux Raymond Sy, PMP, MVP

Recording: http://www.vimeo.com/27856220
Presentation Objectives

- After completing this presentation, you will be able to describe the benefits of utilizing SharePoint 2010 as a Project Management Information System (PMIS)

- In addition, you will be able to comprehend SharePoint’s capabilities to
  - Support project planning, tracking and controlling
  - Enable efficient document management
  - Integrate common project management tools
  - Facilitate team collaboration
  - Automate project processes
  - Generate relevant project reports
  - Allow mobile PMIS access
Dux Raymond Sy, PMP, MVP

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Twitter: @meetdux #sp4pm #pmiwdc
Agenda

- Challenges of Project Management
- Why SharePoint 2010?
- 7 Ways to Leverage SharePoint 2010 for PM Success
- Questions and Answers
Look Familiar?

- How the customer explained it
- How the Project Leader understood it
- How the Analyst designed it
- How the Programmer wrote it
- How the Business Consultant described it
- How the project was documented
- What operations installed
- How the customer was billed
- How it was supported
- What the customer really needed

Courtesy of NicksTrafficTricks.com

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Let’s Get Priorities in Order

- Tools don’t run projects
  - Relevant project management process
  - Responsible and accountable people

- Realize that Microsoft Project and SharePoint are tools
  - Relevant project management process is necessary
  - Project definition and initial planning is needed prior to using these tools
    - Project Charter
    - High-level Scope
    - Work Breakdown Structure (WBS)
# Project Management Maturity

## Levels

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
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| Level 1: Initial | - No PM background  
- Ad-hoc |
| Level 2: Repeatable | - Basic PM training  
- PM Process Standardized |
| Level 3: Defined | - PM Certification  
- Automated workflows, portfolio reporting  
- Templates, Scheduling and Collaboration Tool  
- EPM Tool |

## People
- No PM background
- Basic PM training
- PM Certification

## Process
- Ad-hoc
- PM Process Standardized

## Tools
- Paper, Word, Excel, Email
- Templates, Scheduling and Collaboration Tool
- EPM Tool

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What’s a PMIS?

- A Project Management Information System (PMIS) is a standardized set of automated project management tools available within the organization and integrated into a system

- Used by the project management team to
  - Support the generation and maintenance of project artifacts
  - Facilitate communication and feedback
  - Monitor project activities
  - Control project changes
  - Analyze and forecast project performance

- Contains real-time information essential for initiating, planning, executing, controlling, and closing a project
In a Perfect World

- PMIS should be appropriate to PM Maturity, skill set and existing tools

- Accessibility
  - Information needed can be accessible in a central location

- Traceability
  - One-stop shop

- Team collaboration
  - Easily work with colleagues whenever, wherever, and however
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Why Microsoft SharePoint 2010?

- The business collaboration platform for the enterprise and the web
- Can provide collaborative project management tools to
  - Centralize project artifacts
  - Streamline communication
  - Generate relevant reports
  - Interact with other Microsoft tools
SharePoint 2010 as a PMIS

- PMs are empowered to create a SharePoint 2010 site that serves as a PMIS
  - IT intervention is minimal
  - Based on familiar tools and technologies: Web, Windows, Microsoft Office

- Access can be limited to the project team and appropriate stakeholders

- Project artifacts can be centrally stored and maintained

- Project communications can be streamlined

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#1 Easily Create a PMIS

- PMs can create relevant PMIS
  - Define PMIS components
  - Enable stakeholder access

- If deployed appropriately, IT does not have to deal with
  - Updating content
  - Defining account privileges
  - Maintaining a document repository

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#2 Efficiently Store Project Artifacts

- SharePoint provides various tools to effectively centralize and manage project information
  - Project Schedule
  - Project Documents
  - Change Request
  - Risk/Issue Log
  - Budget

- Document management features
  - Information storage
  - Check-in/check-out
  - Version control
  - Content approval

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Example: PMIS Calendar in Outlook

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#3 Facilitate Better Collaboration

- Project information collaboration
  - Jointly develop documents with document workspaces
  - Requirements clarification with discussion boards
  - Initiate and maintain meeting artifacts with meeting workspaces
  - Document lessons learned with Wikis

- Synchronize Project 2010 with SharePoint 2010
#4 Enhance Communication

- Right information for the right stakeholder at the right time
  - Tasks
  - Schedule
  - Reports
- Relevant project information access
  - Appropriate privileges can be defined based on project communication needs
#5 Automate Project Processes

- Common project workflows
  - Change Control
  - Expense Reimbursement
  - Vacation Request

- SharePoint workflows
  - Out of the Box
  - Custom workflows
#6 Generate Relevant Reports

- SharePoint can be used to generate relevant
  - Interactive summary of a project
  - Project tasks information
  - Automated alerts
- Dashboards can be created using Web Parts
#7 Enable Mobile Access

- A mobile version of a SharePoint site is created automatically upon creation of a site
  - Accessed via the subdirectory /m/
    - [http://sharepointcafe/m/](http://sharepointcafe/m/)
  - Web pages are optimized and formatted for a mobile browser

- In addition, e-mail can be used to interact with a SharePoint PMIS

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Questions?

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