# Project Management As a Key to Business Growth

# A Case Study





### What can you expect to learn today?



**Common Reasons for Project Management** 



**Challenges that RCGI faced** 



RCGI steps for software selection



**Overview of Project Insight** 



Tips for evaluating software



The future for RCGI

#### **Angie Smith, PMP**

- Senior Project Management Consultant
- PMP Certified since 2004
- Over 15 years hands-on experience managing projects in various industries
- Senior Analyst on design of a construction specific PPM
- Served on the Board of Directors for the BC Chapter of PMI for over 4 years
- Blogs for PMI IS COP & PI
- Likes to ride her dirt bike



#### Marc Lalonde, BA-Economics & MBA



- CEO/CFO at RCGI Remediation
   Consulting Group Inc. since 2012
- 30 years with smaller firms in an IT consulting role
- 100's of IT projects and implementations
- 20 years service on non-profit boards
- Plays guitar in an amateur cover band – ask him about his Variax (when you have LOTS of time)

### **Why Project Management?**

Improve Productivity

Maximize
Profitability
or ROI

Achieve Strategic Goals

Increase customer satisfaction

Boost employee engagement

Grow your company

Project Management: Helping to grow a business

#### **About RCGI**



RCGI is a Canadian environmental consulting company that partners with the energy industry to remediate and reclaim contaminated sites. We're based in Alberta, where we have the experience and knowledge to take on the most challenging sites, with the goal of bringing them back to their natural state.

### **Project Management & RCGI**

- 150-250 projects are completed in a calendar year cycle, with an individual project value of \$1,000 \$500,000.
- RCGI grew from an amalgamation of three small consultancies.
- Project management occurred on a somewhat ad-hoc basis, partially because clients didn't see the need for a more formal approach.
- Some projects would lag up to two years behind schedule, with the client's verbal OK, but little formal documentation.
- Initially, while doing a large amount of business for a very small number of clients, resources were organized into Teams.
- With a larger number of clients, and the increasing complexity of the requirements, expertise must now be shared throughout the company, and the team approach breaks down, resulting in much more complex scheduling challenges

## **Challenges**

- BillQuick, Excel, email and Quickbooks were poorly integrated
- Difficult to track resource availability and utilization
- Lack of documentation and back up for client commitments
- No centralized platform to store project data and communication
- Limited scope control on projects
- Manual processes potentially causing inefficiencies
- BillQuick doesn't offer sufficient project planning and costing, and seems to be somewhat 'buggy'
- Projects must often be executed in groups to achieve efficiencies

## **Steps RCGI Took – Project Management**

- The first steps were to enhance awareness of Project Management as a DISCIPLINE most employees were not aware that PMI and PMP existed
- We brought in consultants from MHPM to provide preliminary training and to do some initial assessments
- We identified a group of 4 key people who became our middle management
   and who focus on Project Management
- Those 4 people have started working towards PMP designations
- They also standardized our PM-related tools for use across the company
- But it was all still quite manual and disjointed ...

- We began with an analysis of our current processes and teased out the requirements they intended to address, adding our 'wish list' as we went
- We compiled a list of about 150 software systems that claimed to assist in
   Project Management
- Many were easy to discard as being clearly inadequate or overly costly
- Based on ratings from 'Review Sites' we selected two projects for a detailed analysis over 30 days: Clarizen and Genius
- Using common generic criteria, we then rated them in comparison to
   BillQuick and generated a summary

CRITERIA	BillQuick	Clarizen	Genius	
Client Definition	Good	Good	Good	
Resource Definition	Adequate	Good	Good	
Project Definition	Poor	Good	Good	
Work Planning and Management	Weak / glitchy	Cumbersome / glitchy	Good	
Scheduling and Forcasting	Weak / glitchy	Cumbersome / glitchy	Good	
Time Recording	Good	Simple timesheet only	Simple timesheet only	
Expense Recording	Good (glitchy)	Fair - needs customization	Fair - needs customization	
Approval Process	Flexible but glitchy	Team/Project/Task leader only	Team/Project leader only	
Billing Process	Good (glitchy?)	Poor	Adequate	
Document Management	Minimal	Poor	Poor	
Collaboration Support	None	Good	Good	
Inquiry and Reporting	Good	Good - listings and views only	Good	
Interfacing and External Access	Good	Looks good but TBD	Limited / TBD	
Field Access (Cell phones)	Good	Good no collaboration/expenses	TBD	

- How to screen the 100+ remaining candidates for a closer fit?
- We identified 6 criteria that had 2 common attributes:
  - They were critical to RCGI's requirements
  - They seemed to be uncommon, among the candidates reviewed
- As soon as a candidate failed the short-list, they were eliminated
- A LOT of candidates were eliminated!

	PM Software Suitability 'Quick-Check'					Jun-04	
#	Questions	BillQuick	Clarizen	Genius	Celoxis	Insight	5pm
1	Inter-project task dependancies	N	N	N	N	Υ	N
2	Built-In Invoice item selection	Υ	N	Υ	N	Υ	
3	Pricing time by Employee (Class) or Role/Activity and Client	Υ	N	Y	N	\$	
4	Pricing expenses by Item/Activity and Client	Υ	N	?	N	\$	
5	Interface with Quickbooks	Υ	Υ	?	?	Υ	
6	SQL / dataload capabilities	Υ	Υ	N	?	Υ	
	Verdict	No	No	No-ish	No	Hmm	No

CRITERIA	BillQuick	Tenrox	Genius	Insight
Work Planning and Management	Weak / glitchy	Basic - not a strength	Good	Good
Scheduling and Forcasting	Weak / glitchy	No cross-project dependancies; does have explicit generic resources and good resource searching.	Good with some Cross-project Dependancies and explicit generic resources	Good with Cross-Project Dependancies and Resource Suggestion, but generic resources are not related to the 'real' ones.
Budgeting (internal/external)	Some	Good	Good, but no provision for costs to client budget only	Good, but requires mods for provision for costs to client budget only
Portfolio Management	None	Good	Good	Adequate. Limited to user-definable grouping on reports.
Time Recording	Good	In-task, Week Grid and Worksheet; Actual/Bill time on separate lines; timers but no chimes	In-Task and Simple timesheet only; Actual/Bill time on separate lines; No timers	In-task, Week Grid and Worksheet; Client Rates require mods; Actual/Bill time on separate lines; timers available from Activities only, not Sheet.
Expense Recording	Good	Good, with client expense pricing	No client pricing - no customization available	Client pricing for charges will require mods
Approval Process	Flexible but glitchy	Team/Project/Task leader or exception, by entire timesheet or individual time entry.	Team/Project/Task leader only, by entire timesheet (by day or week)	Team/Project/Task leader with optional override, by entire timesheet (by day or week)
Billing Process	Good	Poor - depends on export	Adequate - Invoicing external	Adequate - Invoicing external
Document Management	Minimal	Can access internal folders and files directly. Version Control for cloud storage	Can access internal folders and files directly, but not supported	Can access internal folders and files directly. Add-ins for Outlook / Word / Excel
Calendar synchronization	None	None	None	Can Manually sync Insight calendar to Outlook, with controls.
Collaboration Support	None	None	Good	Adequate
Systems Architecture	Cloud (US) & On-site, SQL	Cloud only (US) and SQL	Cloud (CA) & on-site, Notes	Cloud (US) & on-site, .Net and SQL - FAST.
Estimated Fit to Requirement	50%	75%	75%	80% as is 90% with mods
Strengths	Time & Expense Tracking and Invoicing	Supports our rate tables, good time & expense with better-than-BQ Project planning	Good Portfolio, PM Planning & Resource Management, collaboration	Good PM & Resource Management, few weaknesses with available modifications
Weaknesses	Project Scheduling, Resource Management, Collaboration, Document management, etc.	No cross-project dependancies, calendar sync, collaboration, client expense pricing; poor invoicing and budget tracking	No client pricing, no mods available, weaker document management, incomplete budget tracking	Weak portfolio management, generic resources, invoice printing, \$30K for mods
Willing to Adjust software to our needs?	Yes, but limited base	No	No	Yes, for non-core functionality
Pricing	\$8K/year	Lowest: \$10-13K/year	Highest: \$22K/year	Lower: \$13K/year

- The Best fit for RCGI: Project Insight
  - Excellent support for cross-project dependencies
  - Decent Time & Expense support (other than pricing)
  - Adequate invoicing support
  - Decent integration capabilities
  - Good performance and consistent, logical user interface
  - Runs on any browser-equipped platform (phones, tablets, PC's)
  - Willing to customize to meet pricing and budgeting requirements

# What is Project Insight

Cloud based, Project and Portfolio Management System that manages the life cycle of your projects



- Project Requests
- Portfolio Prioritization
- Intelligent Scheduling
- Resource Allocation
- Executive Dashboards
- Customizable Reports
- Alerts & Notifications

- Integrated Calendar
- Time Tracking
- Expense Tracking
- Budgeting & Costing
- Collaboration
- Document\_Management
- Forms Management

- Approvals
- Issue Tracking
- Outlook Integration
- Office Integration
- Mobile applet
- Customizable
- Agile Support



- All data in one centralized location
- No client-side software needed
- Accessed via Smart phones or Tablets
- Access, update and edit projects
- Anytime and Anywhere
- MAC and PC (IE, Firefox, Chrome)

#### **Personalized Dashboards**

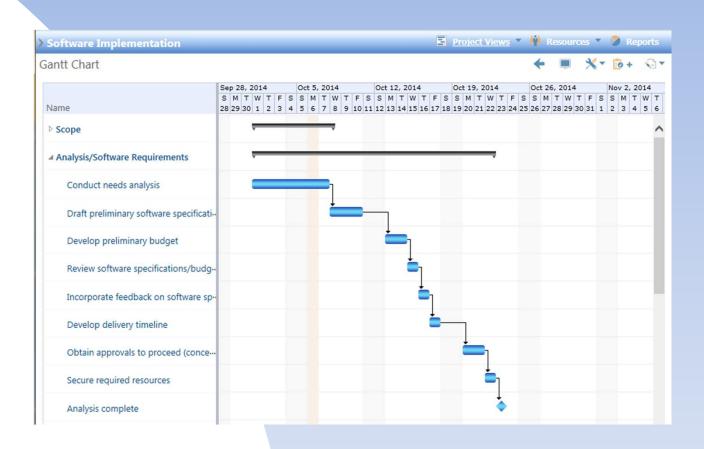




Gives your Executives,
Project Managers, Team
Members & other
Stakeholders access to the
information they need

Reduces the time spent searching for information and creating reports

# **Intelligent Scheduling**



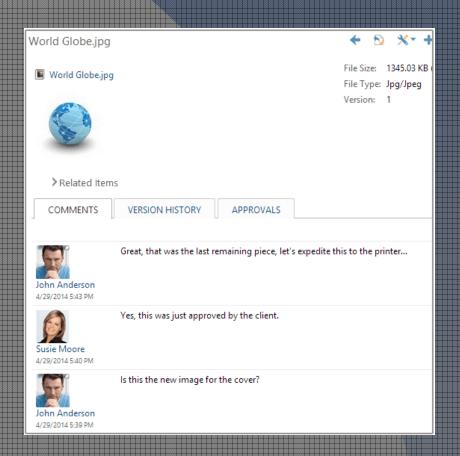
Rapidly create a schedule and easily shift schedules with templates, MS Project import, inline editing, drag & drop & dependency based scheduling

# **Enterprise Resource Management**



Optimize your resources across all your projects and work to accomplish things quicker and faster

# Manage your Documents



- Maintain entire project history and communication all in one central place
- Attach files of any type to a project, task or folder
- Use Version Control
- Check in/Check Out Documents

# Collaboration

Project managers used to spend 50% of a week chasing project status, now we spend minutes.

Myriad Development Inc

**Add Comments** 

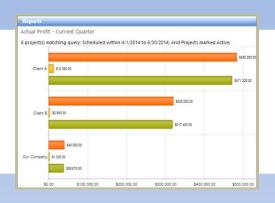
Save Emails

**Update Status** 

**See Notifications** 



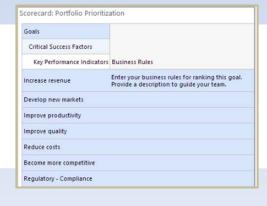
# **Real-Time Reporting**



Users can generate the reports they want in real-time without IT

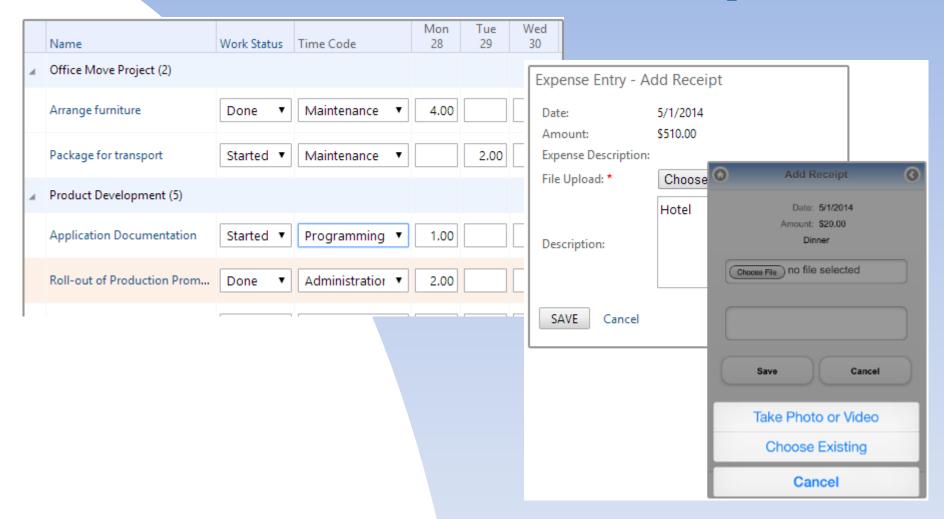


Save the reports to rerun later, share with others and put on your dashboard



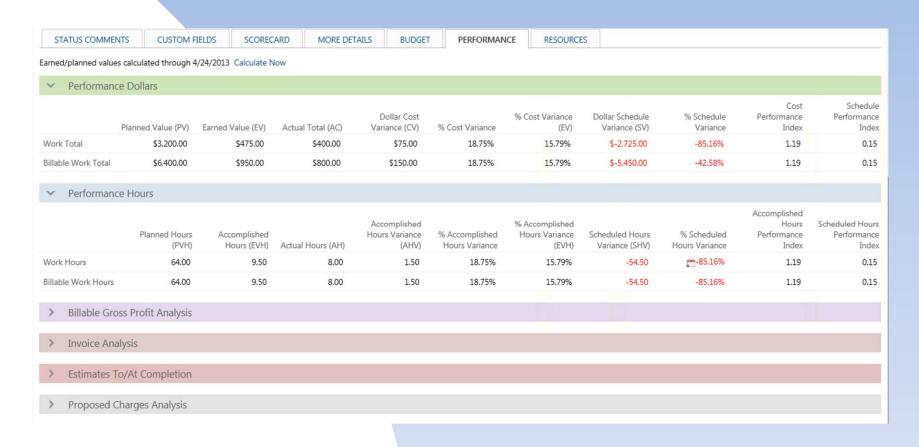
Reduce effort while easily accessing the information needed to make important decisions

# **Track Actual Hours & Expense**

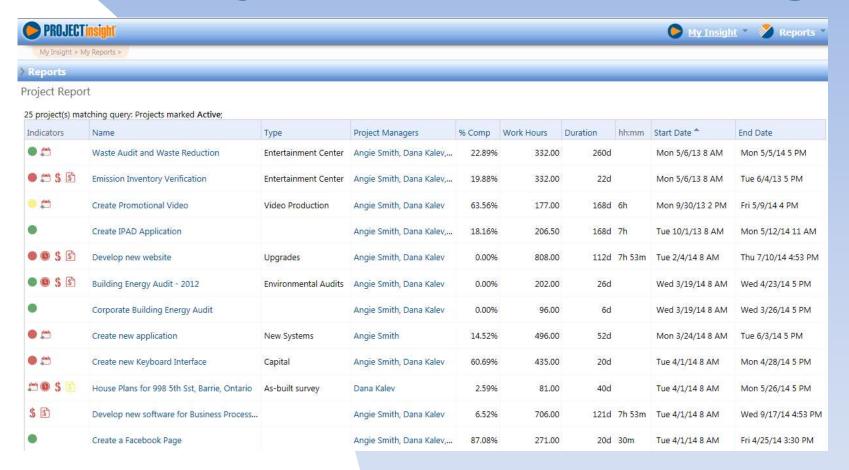


See if you are on target in real-time and have the data to make adjustments & address issues before it effects profitability

# Deliver Projects On Time & Budget



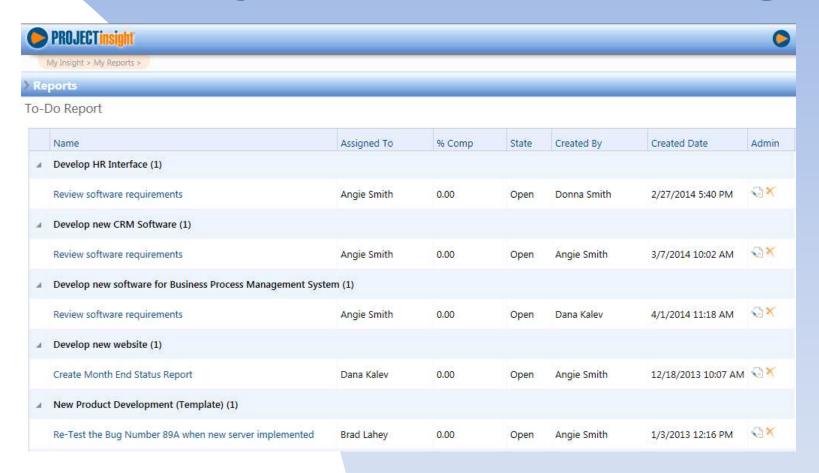
# Deliver Projects On Time & Budget



# Deliver Projects On Time & Budget

15: Project sponsor is out of town f	or 2 weeks 👉 💥 🕆
Description:	
Our sponsor was called away for the next tw Is there anyone who can approve the first dr	
✓Issue Details	
Priority:	Туре:
Medium	Delay
Project Affiliation:	Task Affiliation:
Brochure	[Create Task]
Resolution Project:	Resolution Task:
Brochure	
Found By:	Found Date:
John Anderson	5/1/2014
> Resolution History	
> Related items	
COMMENTS CUSTOM FIELDS	
[Assigned To change	d from: Unassigned to: Nick Wong]

# Deliver Projects on time & budget



# Adaptable, Customizable & Integrate-able

- Out of the Box
  - Adaptable user experience
  - Add user defined fields
  - Setup user defined forms
  - Integrate with Outlook, Office and Box
- APIs and Software Development Toolkit for your in-house developers
- Customization Services for a fee

# **Tips**

# **Determine your Tier of PPM Solution**

	Low End Systems	Mid-Market Systems	High-End Systems
Functionality	One or Two Main functions	Complete Life Cycle	Complete Life Cycle w/rigid controls &complex analysis
Investment	< \$ 0 - \$5,000	\$5,000 - \$50,000	\$100,000 +
PM Maturity Level of Organization	0 - 1	1- 3	3.5 + (sophisticated)
Implementation Time	Days to weeks	2 weeks to 6 months	1 year +

## **Evaluate the Strength of the Solution**

Heavy Planning & Scheduling

or

Strong Time & Expense Tracking

or

Both

# Not all "Project Management" software is created equal

**Summary Tasks** 

**Drag & Drop to move tasks** 

**Copy tasks** 

Task Dependencies (FF, SF, FS, SS)

Lead & Lag

**Cross Project Dependencies** 

**Task Splits** 

Standard functionality not customization

# **Searching for a Solution**

Using review websites and review companies

Review websites or review companies have one goal:

To make money

### **Reviews Companies**

- Pay for use (Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services \$1,995.00 USD)
- Most of their clients are Fortune 100 and want/need sophisticated, expensive solutions
- Focuses on high end IT PPM systems i.e the system needs to "Significantly supporting internal IT PPM"
- Companies are not incentivized to cover low-end or mid-market solutions
- "Providers must have \$10 million in annual revenue or significant financial backing"
- When they do cover mid-market PPMs, they are Venture Capital backed

### **Top Ten Review Websites**

They make money via online advertising

Independent contractors write reviews

Only do reviews every 2 years (and sometimes not even then)

All products within a category are not on the same review cycle

### **Software Suggestion Websites**

# Project-manager.com Getapp Software Advice

- Makes money via by companies paying them to be listed on their website
- Project-manager.com & Getapp ranking based on paid bids –
   whoever pays the most gets the highest ranking

## **Searching for a Solution**

# Reference websites and companies that provide reviews but do your own research

#### **Change Process or Change Software?**

Are you willing to change your process to match the software?

OR

Would you prefer to pay to change the software to match the process?

OR

Both?

# **Support**

Don't do all your learning by trial and error

Can be more costly than support or training

#### **Lessons Learned**

- Determine the tier of system suitable for your organization
- Determine if you need a system that is stronger on planning, time & expense tracking or both
- Identify project management specific functionality that your organization requires – integrate with your requirements document
- Determine any unusual "must have" requirements that are specific to you –
   shortlist the alternatives based on those
- Verify whether the shortlist systems meet all your other requirements
- Determine budget/appetite for process or software changes
- Run trial systems with real projects for proof of concept
- Get help if you need it and pay for it if you need to

# Where is RCGI at with the implementation & plans for moving forward

- Other critical business issues have surfaced that must be dealt with
   in the next 4-8 months
- We are extending the implementation plan from 5 to 15 months:
  - Training of Project Managers to continue for the rest of 2014,
     with hands-on experience in defining projects.
  - All 2015 projects will be defined and status-tracked on Project
     Insight, with Time and Expense tracking continues on BillQuick
  - Time and Expense tracking will move to PI likely in summer 2015

### What RCGI expects to get out of this process

- Greater project management volume capacity.
- Standardized project management processes.
- Better scheduling of resources shared among projects.
- Better Projection of future resource pool capacity and requirements.
- Easily produced status and performance reports for clients.
- Consolidated inputs to financial projections.
- Increased efficiency in project monitoring and communications.
- Better documentation of project communications.
- Greater employee comfort with workload and schedule.

### Alignment to RCGI's strategic objectives

- Positioned to take on more business with solid processes
- Happier customers via better management & communications
- Happier employees via better communication & scheduling
- Increased profits due to increased efficiency and utilization
- Enhanced stability with better long-term planning

#### **More Information**



# Remediation Consulting Group www.rcgi.ca marc.lalonde@rcgi.ca



www.projectinsight.net angie@projectinsightcanada.ca