



Implementing Project Portfolio Management

Using Planview PPM Pro for strategic planning

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Overview of Crescent Bank

- Founded in 1991 by a small investor group
- Based in Louisiana but have loan production offices in 23 other states
- We concentrate on Sub-prime Auto Lending
- We also have great rates on CD's!
- Current asset size of over \$1 billion dollars
- Smaller sized IT Group (~30 staff)
- IT mainly does integrations

Quick Presenter Overview

- Gary Merrifield, IT Vice President and Director of Business Systems Analysis
- Background in Software Development, Project Management, and IT Strategic planning
- Have been with Crescent Bank since 02/2017



Where We/I started

- Brought in as a consultant to manage a wayward project
- Asked to identify project management processes and procedures that could be implemented
- Quickly identified there were higher level issues affecting projects:
 - Too many active projects –
 - Projects were stuck, task swapping was killing productivity
 - Little insight into what projects were active, their status, or their progress.
 - Had to ask each manager what they were working on, who had to ask their staff.....
 - No formal approval process to start new work
 - No way to accurately predict what resources were overloaded
 - Once again, ask manager, who asked staff what they were doing. Wrote that up....

Setting Direction

- Created a small leadership team of CIO and two VP's to set direction
- What we wanted to do:
 - Put controls on starting new projects
 - Make any new process simple and easy to follow
 - We wanted to visually see our Work Portfolio on demand
 - We wanted to be able to see our resource allocations. Where were our staff spending time.
 - Visually see when our resources are over allocated
 - Process first then tools
 - Evaluate the impact of adding another project to the portfolio



Starting the process

- We repurposed a monthly senior mgmt. meeting to review current and proposed work
- Built a simple approval process for new or challenged projects
- Built a simple project initiation process
- Started evaluating tools
 - Pulled together our requirements for a new tool
 - Lots of input from our IT management
 - Eventually selected Innotas now Planview PPM Pro

Starting the process (continued)

- Group agreed upon requirements for a new tool
 - Tool must be geared for a small to mid sized organization
 - Must be able to see the entire IT Portfolio
 - Must be able to see where resources were putting their time
 - Must be able to see where resources are allocated to in the future
- Must be able to do “What-if” analysis
 - Ability to model adding a new project to the IT Portfolio and balancing work load
 - Must do this in a “Sand box” without affecting current projects



Implementation (2017)

- Worked with Planview group for implementation
- Started simple and built up
 - Currently only IT uses the tool
- All IT staff enters time in PPM Pro
 - Very high compliance on timesheets



Implementation (2017) Continued

- Managers very concerned on employee efforts on non-project work
 - Often receive work request for a “quick report” and 200 hours later...
 - Created separate project plans for “Task” and “Support” work
 - Task – Work items that could go over 80 hours
 - Support for generic support work

We are live so now the biggie: 2018 Strategic Planning

- Our Business Systems Analyst (BSA) group led the effort to work with the Business to identify future work
 - Worked with Business Units to identify proposed projects
 - Ended up with a fairly long list
 - We worked with the Business Units to prioritize their work within their domain
 - All units were fairly flexible and some immediately pushed back some of their work when they saw the workload
- IT Managers identified their future projects
 - They also did rough estimating on all projects
- Taking this information we use the “What If” tool to start planning out 2018
 - Multiple iterations
 - This was for IT resources only. Typically, IT is the bottleneck but the Gantt charts helped the Business identify major impacts to their staff

2018 Strategic Planning - What went well

- Prioritization with the Business Units went well
 - Established a basic planning process that we will build upon for 2019
- Using the “What If” tool we actually pushed projects to 2019!
- We now have a centralized view of our work portfolio
 - Reporting to Senior Management much easier to create
- Compliance is high for timesheets
- We now better understand where time is going
- We are using 2018 as a benchmark and expect 2019 planning to be better
- This will be a multi-year effort



Lessons Learned

- Somewhat difficult to get “High-Level” estimates as everyone was afraid they would be held to that estimate
- BSA group is only a year old, still learning
 - I am merging the PM and BSA (Business System Analysis) groups to better move the process forward
- Tendency for staff to overestimate effort, management to underestimate the level of effort
- Current projects are pushing resources to the limit and efforts to improve the PPM process have slowed considerably
- Balancing priority of future projects between departments still needs work

Lessons Learned (Continued)

- Our proposed 2018 portfolio (from March) has slipped considerably
 - We knew this would happen but now we have a benchmark
- What If tool needs better reporting, exporting of data
- Licensing
 - Getting T&E users to use “Dashboards” has been difficult and managers are pushing for more users to be “Full Users”

Next Steps

- Project Management and BSA groups are merging
 - We are using this to revamp how the groups operate
 - Adding additional resources for both groups which will help
- We continue to review project status and report
- 2019 Planning
 - Use 2018 data for 2019 planning
 - Streamline portfolio





Thank You