

INFOSHEET



Process Consulting

Online

Delivery method and duration

The process consulting is delivered by an experienced implementation consultant. The consultant will take a consultative approach to help the customer envision and build out company processes in Projectplace.

Assumptions

- The customer will assign a project owner (Projectplace account administrator) to act as the main point of contact.
- The customer will identify project managers and other resources who will have a say in how the customer process(es) will be set up in Projectplace.
- The customer is responsible for providing information about their work process(es), preferred project template(s) and their portfolio KPIs.

Parties involved	Agenda	Estimates
Process Consulting		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • Discussion on customer process(es) around project management and/or BAU work • Advice on how to build these processes in Projectplace 	4 hours hands-on consultancy
Customer; Project Sponsor and experts on company process(es)	<ul style="list-style-type: none"> • Building templates in Projectplace which support customer process(es) • Building out other parts of the tool such as roadmaps, request forms, portfolios including KPI's and teams if applicable 	
Outcome		
	<ul style="list-style-type: none"> • A clear understanding of how Projectplace will support the customer's work process(es) • A clear understanding of what a. o. a portfolio, a request, a roadmap, a workspace, an activity, a milestone, a board, a card, a folder, a document, a team and a group will represent in the customer process(es) • The draft of one workspace template and the ability to complete it outside of the workshops • The draft of roadmaps, request forms/ portfolios with KPI's and teams if applicable and the ability to complete them outside of the workshops 	

Free enablement webinars

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