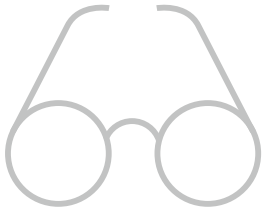


INFOSHEET



Work Management (PPM Pro – Projectplace)

Online Services

Delivery method and duration

Consulting on the Work Management option between PPM Pro and Projectplace is delivered by an experienced implementation consultant. The implementation package includes consulting on both the PPM Pro-Projectplace integration and the different Projectplace use cases. It also includes Projectplace enablement training for users at various levels of tool engagement. The consultant will take a consultative approach to help the customer envision and build out company processes in Projectplace. Member and administrator enablement training on the tool will be customized to the customer's needs and processes and adjusted to number of resources to be onboarded.

Assumptions

- The PPM Pro-Projectplace integration is set up.
- The customer will assign a project owner (Projectplace account administrator) to act as the main point of contact. This person will carry the responsibility for scheduling enablement training for other customer resources.
- The project owner will organize groups with a maximum of 20 resources to participate in the enablement training workshops.
- 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
Project kick-off		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • A quick overview of Projectplace and Planview • The customer's needs and experience level • The services package plan and timeline 	1 hour
Customer; project sponsor, account owner/ administrator(s)	<ul style="list-style-type: none"> • Go-Live-Date • Discussion on customer involvement • Projectplace Implementation workspace 	

Outcome

- To have the implementation workshops scheduled
- Identification of customer resources who will join which workshops
- Access for the customer core team to the Implementation workspace

Parties involved	Agenda	Estimates
Integration workshop		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • Introduction to all PPM Pro fields related to the integration with Projectplace • Enablement training on how to sync projects over to Projectplace • Enablement training on how to sync templates over to Projectplace • Overview of data which syncs between PPM Pro and Projectplace 	1-4 hours
Customer; Project Managers & PPM Pro administrators		
Outcome		
PPM Pro Users with access to projects will be able to:		
<ul style="list-style-type: none"> • Sync over projects and templates • Find Projectplace data points in PPM Pro to report on • Track the progress of Projectplace workspaces in PPM Pro 		
Account administration		
Planview; Projectplace consultant	<ul style="list-style-type: none"> • Enablement training on account administration • Introduction of Projectplace tools above workspace level • Identification of Projectplace tools necessary to support customer process(es) 	1 hour
Customer; Projectplace account administrator(s)		
Outcome		
Account administrator(s) will be able to:		
<ul style="list-style-type: none"> • Navigate the account administration section • Manage account settings • Manage account users and access rights • Manage requests • Manage portfolios • Work with the workload tool • Navigate templates 		
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 • 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 	2 hours
Customer; Project Sponsor and experts on company process(es)		hands-on consultancy
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 		

Parties involved	Agenda	Estimates
Workspace administration		

Planview; Projectplace consultant	Enablement training on: <ul style="list-style-type: none"> • Navigation in Projectplace • How to create/ manage workspaces • How to create/ manage templates 	2 hours
Customer; Project manager(s) and work administrators		

Outcome

- Understanding the principles of collaborating in workspaces
- The ability to create, customize and administrate workspaces
- The ability to manage access rights and create a workspace plan
- The ability to customize boards and to build a document structure
- The ability to track project progress
- The ability to create and manage templates
- The ability to create and manage teams
- The ability to report status to Projectplace portfolios
- The ability to export a time report

Member enablement

Planview; Projectplace consultant	Enablement training on: <ul style="list-style-type: none"> • Navigation in Projectplace • How to update user account settings • How to install the desktop application • The Personal & the team overview • How to work in a workspace 	2 hours hands-on consultancy for 15-20 resources
Customer; Project members	<ul style="list-style-type: none"> • Exercises (optional) 	1-hour workshop

Outcome

- Understanding the principles of collaborating in workspaces
- The ability to navigate from the personal overview, to workspaces, to personal user settings
- The ability to communicate within Projectplace
- The ability to work with boards and cards
- The ability to manage work
- The ability to work with documents
- The ability to report time

Follow up and wrap-up

Planview; Projectplace consultant

- Review of customer process(es) build in Projectplace
- Make small adjustments to templates or other parts of the tool, if applicable
- Q&A after having worked in Projectplace for a while

1 hour

Customer; Project managers and account administrator(s)

Outcome

- All outstanding questions answered
- Customer live with Projectplace

Free enablement webinars

Aside from providing customized consulting and enablement training, Planview also delivers free enablement webinars on a monthly basis for its entire customer base.

You can sign up for these webinars at success.planview.com/Planview_Training_Services