eBook

Mastering Project Intake

The First Step to an Effective PMO

KEYEDIN®

WHAT'S IN THIS EBOOK?

Introduction: The Well-Run PMO

A well-run project management office (PMO) brings significant value to the company. Research that explored the top 25% of project management offices, found that an effective PMO can have a significant business impact, including:

1. 43% improvement in strategic alignment
2. $175K cost savings per project
3. 25% decrease in failed projects[i]

These kinds of results are achieved through a coordinated, controlled and complete top-down effort that starts with the project intake (PI) process. When new ideas must be created, shared, and approved to become projects, does your project intake process rise to the occasion?

We have gathered specific and actionable project intake best practices in one place to assess your ability to onboard projects effectively, and according to strategic demand. According to Info-Tech Research Group and to those of us working in this discipline each day, “failure to align projects with strategic goals and resource capacity are the most common causes of portfolio waste across organizations. Intake, approval, and prioritization represent the best opportunities to ensure this alignment.”[ii]

Three Signs Your Project Intake Is Broken

Do you find your project teams always being reactive because you aren't able to effectively forecast the team's work load?

If project intake isn't consolidated or you are lacking a standardized method of gathering information prior to taking on a new project, you will usually see these three signs that can wreak havoc on your PMO:

1. Is it easy for items to fall through the cracks? Do your project managers wake up in the middle of the night and remember a critical request that was missed?

2. Do you know what you can commit to? When you can't see all the demand for your resources in one place, it's impossible to know the real impact of saying yes or no to a project.

3. Are you fighting fires because you lack a clear picture of your entire portfolio? Do you find your project teams always being reactive and jumping from one flailing project to another because you aren't able to effectively forecast the team's work load, which starts with seeing everything they're being asked to do in one place?

The ABCs of Effective Project Intake

Here are three simple ways to solve project intake challenges in a variety of different environments.

“A”

When project intake is enabled and kicked off, it will automatically generate a project in your PPM tool from a template.

All Projects and People:

CRM Integration

Perhaps you have encountered this scenario: The sales force lands a million-dollar professional services deal. They’ve meticulously plotted each interaction with the customer in the CRM system (let’s assume they’re using Salesforce). The contract is in place. The head of the team that closed the business sends an email to the PMO outlining the parameters of the work and attaching the contract. What’s wrong with this picture?

When project intake is enabled through your CRM and kicked off by an opportunity that is closed in Salesforce, it will automatically generate a project in your PPM tool from a template (or multiple templates depending on the type of project). Details of the new project can then flow back into Salesforce. This is exceedingly valuable if projects are generated from sales or services engagements or are marching orders from customer requests or closed orders.

We have worked with professional services teams on this type of multi-directional integration using forms and templates to leverage repeatable work when terms and contract flows may change during engagement. The CRM intake integration allows sales and project teams to capture end-to-end project information, thus leveraging repeatable work and creating a data history to make bids more realistic so that your contracts are more profitable.

"A significant facet of our success has been a vastly improved ability to understand the true cost of resources applied to a project," said a professional services company and client of KeyedIn Projects. During project intake, they also cited their ability to "proactively allocate resources as needed per project," during bidding and intake. Enabling transparency for these crucial project factors allowed better time and expense oversight throughout the contract lifecycles.

"B"

If you're fielding a lot of different kinds of project requests, then the project intake forms in your solution must be easy-to-use by people who aren't used to using them every day.

Built-in Best Practices:

Native Request Forms

Project intake can also be addressed through native project request forms in a PPM solution. For example, if you manage a large IT PMO in a multinational healthcare company, your internal requests come from internal entities and run the gamut from architecture to apps. If you're fielding a lot of different kinds of project requests, then the project intake forms in your solution must be easy-to-use by people who aren't used to using them every day. You can ensure that all of the requests are shared with stakeholders at their corresponding cost centers. Your gatekeeper must be able to apply resources by role; by specific individual; and slice-and-dice common intake variables into the process via standardized best practices that come to life on your intake forms.

We have seen improved intake processes for many IT

PMOs, across numerous industries, that not only created a central repository for all requests – which in turn dramatically improved efficiency – but which also engaged users in a practical way, to eliminate the sharing of valuable project details across ad hoc tools like email, chat, etc.

“C”

Proper intake processes silence squeaky wheels and overbearing stakeholders by establishing a progressive approval and prioritization process that gives primacy to the highest value requests.

Consumerization with Control:

External Website Forms

Another way to gain control over the intake process is by integrating the PPM solution with external web forms. There are many situations where users don’t need full access to the software but are significantly engaged to projects with very specific integration needs. Perhaps you run the PMO for a professional services company that contracts third party resources (and perhaps even their sub-contractors) to input project status data, originate reports, or even require personalized dashboards.

Possessing an open application programming interface (API), in which custom PI data flows through the system allows you to engage all users—even those that do not need full access. Be sure to consider including a mobile interface for requests and communication or notifications on-the-go.

One global retail pharmacy and healthcare distributor was fraught with the “squeaky wheel” process of prioritizing projects during intake. When they implemented consistent web forms to standardize their intake procedure, they gained visibility, clarity and control over global enterprise projects. Proper intake processes enabled by PM solutions silence squeaky wheels and overbearing stakeholders by establishing a progressive approval and prioritization process that gives primacy to the highest value requests.

Highest Value Requests:

Powerful Practices from Real Clients

"Having one tool, which is used centrally, makes us more effective. It underpins our business and adds to the project manager's tool box as an aid to delivering projects in a more consistent way and helps us deliver the best service we can to our clients."

- Head of Client Delivery Practice in IT Computing Services

Project intake remains one of the most important phases for selecting both cost-efficient and revenue-generating projects. Your intake forms, processes and workflow should enable complete visibility and control so that you are reviewing requests in light of several key elements: "strategy alignment, cost, scope, impact, risks, and benefits (hard and soft dollar)."[iii]

All projects are not created equal and their value to the business can be weighed utilizing a variety of metrics during the project intake process. Our healthcare IT clients often choose to look at resource deployment metrics to drive intake decisions. Many of our professional services and embedded services clients use our intake functionality to measure strategic alignment and the potential for enhanced customer satisfaction. Still others use intake widgets, dashboards and intuitive analytics to ensure benefits realization. At the end of the day, a solid project intake process enabled by powerful PPM tools has led to both internal and external partners acknowledging their PMO's value as a gatekeeper to the most valuable, forward-looking ideas to grow their business.

"With KeyedIn, it's a lot easier to look forward," said KeyedIn Projects client Andrew Lucia of MedHost. Do you need a more forward-looking view of project intake? You might start by requesting a free product trial or call one of our PPM Project Intake experts.

About KeyedIn® Projects

KeyedIn Projects enables your PMO to be more strategic, more efficient, and deliver greater business impact by allowing you to easily forecast and allocate resources, create and analyze portfolios, gain visibility to all your projects, and discover new insights through dynamic PPM analytics.

Visit www.keyedin.com to learn more.

i State of the PMO 2016

ii Bondale, Ganshert, Pandya, et.al, "Optimize Project Intake, Approval, and Prioritization, Give yourself the voice to say "no" (or "not yet") to new projects" InfoTech Research Group. http://www.infotech.com Accessed September 4, 2017.

iii Camiliere, Erica, Annual Planning Process: How to Identify Your Projects, www.centricconsulting.com Accessed September 6, 2017.

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