Hewlett Packard Enterprise

Business white paper

Four starting points for effective PPM

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No two companies are alike; no two organizations are alike; no two Project/ Program Management Offices (PMOs) are alike. But if the goal is more effective project and portfolio management (PPM), the key business process requirements are the same.

Executive summary

Traditional project management techniques are not working as expected. According to the Project Management Institute, only 64 percent of projects meet their goals and that number has been flat for multiple years.[1] And even when projects are executed successfully, there can be wide variation in the level business benefits delivered.

So, how do you get started? How do you prioritize which issues to address first? What are the risks and potential rewards? What can you do yourself and where might you need help?

This paper helps you answer those questions. It provides important insights into root causes of project failures and misalignment with business unit expectations, along with possible solutions. It illustrates the path to help optimize PPM from four different starting points and provides step-by-step advice to help you reach new milestones quickly. It is intended to help you make the transition from managing projects to managing business outcomes.

Whatever the type and size of your business, whatever its level of experience with PPM, you can improve the effectiveness of your practices—at your own pace—without disrupting your current operations or increasing the level of heartburn among your current staff. Here is how.

Symptoms of a serious problem

Despite significant investment by the organization, best efforts of highly trained and talented project managers, technical staff, and vendors, projects consistently fail to meet business objectives. In some cases business and project teams may even expect their projects to fail even while the same teams know their CEOs expect predictability.

Challenges for today's PMO
The result of unsuccessful projects puts enormous pressure on the PMO. Executive management wants tighter alignment between business objectives and project investments; technical staff wants better tools and processes for executing projects; and project managers want technology that provides more meaningful insights into project status, resource usage, and so on.

At the same time, budget constraints continue to tighten, and executive management is hesitant to allocate more resources to internal organizations that appear to be underperforming. Thus, the PMO finds itself in a vicious cycle.

"We decided to get our business processes right before introducing the technology. So we spent a good 12–18 months streamlining and tightening our processes across the business. The biggest pain point we had was a lack of visibility of our project portfolio."

–Ferne King, Director, Deloitte, Investment and Growth Forum

[1] "Pulse of the Profession: Capturing the Value of Project Management," PMI, 2015

The organization needs complete visibility into everything it is working on, including project health metrics, non-project work, resource allocations, and overall costs.

The PMO or equivalent role must:

- **Establish the workload:** Capture demand, evaluate, and prioritize the project requests, and select and execute specific projects. In addition, project management processes and operational process controls (as established in Information Technology Infrastructure Library [ITIL®], Project Management Body of Knowledge [PMBOK], PRINCE2, Control Objectives for Information and Related Technologies [COBIT] frameworks, and the like) must be applied.
- **Align roles with workloads:** Identify resources and apply them. The PMO must also apply organizational change processes such as the responsible, accountable, consulted, informed (RACI model).
- **Identify and apply measurements:** Examples include service-level management, Six Sigma, and balanced scorecard key performance indicators (KPIs).
- **Achieve compliance:** The PMO must help the organization facilitate complete, consistent, and ongoing compliance with regulations, such as Sarbanes-Oxley, Health Insurance Portability and Accountability Act (HIPAA), the Gramm-Leach-Bliley Act (GLBA), and the European Union (EU) Data Protection Directive.
- **Provide financial transparency:** Gain early indication of budget deviations between plan and actuals to stay ahead of potential financial risks. And leverage cash flow and other automated analyses to increase accuracy of IT investment decisions and subsequent reporting to the business.
- **Provide executive visibility:** Executives need to understand the status of their investments and be able to compare their progress against strategic goals and industry benchmarks.

Root causes of project failure

Today's project and service organizations, including IT departments, struggle with project, time, cost, and resource management challenges. The struggle is at the aggregate level. Most of these organizations have time-reporting systems and project-scheduling tools, but with such tools, these organizations cannot take a step or two away from the trees to see the forest.

The lack of the "big picture" is at the heart of the PMO's challenge. There is no consolidated view into all the demand placed on IT, so there is no structured way of prioritizing project investments. There is no integration of planning, financial, and resource data across the project portfolio, so there is no way to optimize the workflow. There are no enterprise-wide standards or methodologies, so there is no consistent way to measure or monitor success.

Simply put, there is no way to align project activities with business priorities, and a recent explosion of lightweight cloud-native project management tools only serves to complicate the situation.

Hewlett Packard Enterprise (HPE) approach to PPM

HPE believes that effective PPM requires a focus on business outcomes at the aggregate level, not just success at the project level. Solving the challenges of PPM does not require more and better project management tools; it requires an integrated, top-down view of all investments so management has better visibility, more control, and greater flexibility. With this information comes transparency and reliable reports, enabling the organization to have more productive, fact-based conversations between various stakeholders.

Better visibility

You need the ability to aggregate both strategic and operational projects and see the critical interdependencies among projects. This enables you to identify projects that have the highest return on investment (ROI) quickly and optimize the project portfolio accordingly.

A PPM solution should make it simple to get started, yet flexible enough to allow you to adopt either a top-down or bottom-up project planning approach.

In fact, a past study of HPE PPM customers determined that increased visibility into the portfolio enables firms to cancel projects that do not demonstrate sufficient value. Doing so saved study participants 6.6 percent of their annual budget after one year, rising to 10.4 percent after three years.[2]

More controls
Integrated, top-down PPM can help you cut costs by automating and enforcing project, program, and portfolio management processes. An effective solution can provide field-level audit trails for all changes to critical applications and projects, helping you analyze performance and maintain regulatory compliance. Once the PMO becomes more agile, processes can be adapted more quickly to respond to changing market conditions with an easy-to-configure workflow process engine.

Implementing standard project management processes helps you gain transparency into critical financial data and allows you to see quickly how your initial estimations are holding up against project actuals. This enables rapid course correction and helps you keep more projects on time and within budget.

Gaining early visibility into the potential impact of change yields significant savings. An HPE PPM ROI study revealed that companies using HPE PPM to automate the PPM change processes saved 4.5 percent of the average IT budget after one year and 5.4 percent after three years.[3]

Increased agility
A PPM solution should enable you to accelerate execution and usability with zero-client Web-based or mobile project management. It should allow you to bring in project plans from Microsoft® Project, Excel, Word, and other data sources and gain an aggregate view across strategic and operational projects.

The HPE PPM ROI study also revealed that by giving managers the IT arena visibility into the entire project portfolio and related interdependencies, they could lower labor expense by improving resource utilization and greatly reduce the need to hire additional in-house or external resources. Companies in the study saved $400,000 USD on average in one year and $2.2 million USD after three years.[4]

In short, an effective PPM solution is expected to be flexible enough to allow you to aggregate all your project and change data into one place regardless of data source—allowing you to better utilize and plan your resources. It is also expected to be simple and flexible enough to enable you to implement standards and methodologies across the enterprise in the way that best maps to your organization's maturity—so you can get started quickly, accelerate adoption, and get great results sooner.

Reliable reporting and analysis
Automating and standardizing PPM processes help verify that the data recorded by key stakeholders, project team members, and executives are consistent and reliable across all projects types. This provides the basis for apples-to-apples comparisons that drive effective decision making at the overall investment portfolio, program, and project levels. Executive dashboards give insights into trends and highlight areas that need focus. Also, operational dashboards and reports support the rapid review of project budgets, and financial analysts can gain real-time insight into emerging trends with dashboards and ad hoc reporting. At the same time, analytical reports can be used by anyone to identify and resolve issues before they become significant problems.

Delivering real-time reports and analytics, based on reliable information, backed by a big data platform, can help you create an effective, ongoing dialogue with all stakeholders. Importantly, it can help you develop and sustain momentum as users at all levels can quickly see how their day-to-day work affects the big picture.

[2, 3, 4] "Customers provide a positive ROI using HPE PPM Center," HPE Software, 2012

Four starting points

There is no question that better PPM processes are needed. The question is how to get started on the road to optimization. This section offers practical advice about next steps to take from any of the four areas of focus or "starting points." Your starting point depends on your organization's particular business issues and needs. Hewlett Packard Enterprise and its partners have seen success with clients starting in any of these four areas.

Demand consolidation: For many organizations, understanding all of the demand being placed on the organization is the essential first step in prioritizing the workload and determining the relative business value of various alternatives.

Portfolio management: You cannot calibrate the business value of an individual project if you cannot see the big picture. A focus on portfolio management allows you to govern the entire investment portfolio and make apples-to-apples comparisons.

Project execution: Delivering complex programs and projects on time and on budget is a major challenge for any organization. Focusing on project execution allows you to see which projects are in trouble at any given time and make decisions about how to get them back on track.

Resource management: For some organizations, the top priority is the ability to automatically analyze and compare skill sets, levels of proficiency, availability, and projected resource utilization while staffing projects as well as during the initial proposal evaluation process. The goal is to take an otherwise time-intensive process and drive new efficiencies while maintaining the best allocation of resources.

Figure 1. The maturity map helps you determine where to focus and which steps to take next.

Setting your priorities: the maturity map

For each of the four starting points, this paper can help you determine where you are on the "maturity map" so that you can set your next milestones realistically. In general, there are five phases of maturity:

- **Informal:** Planning is ad hoc. There are no structured processes for any aspect of PPM. Projects come in the front door, the back door, or the side door. Budgeting is done in a "black box." Visibility is nonexistent and there is no single source of truth.
- **Defined:** This phase involves manual planning, but evaluation is based on seat-of-the-pants calculation. Pet projects of top executives get priority regardless of business value. Lightweight project tools may be in use for execution.
- **Managed:** A PPM solution is typically in place with automated processes that support objective proposal ratings. A single system of record is used, enabling planned vs. actual budget comparisons and proactive management of projects and resources.
- **Measured:** This is a KPI-driven stage, typically defined by advanced what-if analysis, benefits realization, and performing total cost of ownership (TCO) on assets. Companies can perform supply or demand load balancing. Visibility into project baselines with earned value analysis offer greater specificity.
- **Optimized:** Companies at this stage are performing real-time planning and full portfolio optimization. Scorecards are communicated to key business stakeholders. Advanced skills management with optimization drives cost-effective resource management. Overall portfolio planning leverages what is now a considerable knowledge base.

Starting option #1: Demand consolidation

The first step in consolidating demand is to identify a solution that is capable of aggregating and managing all the diverse demands placed on your organization: operational projects, strategic projects, projects that come in through the front door (established processes), and projects that come in through the side door (the executives' pet projects). This gives you the information you need to determine which requests have the highest business priorities and how they match up with your staff and technical resources.

You also need a solution that allows you to bring in existing project plans from Microsoft Project, Excel, Word, and other disparate project data sources, and you need to be able to create an aggregate view across all project types. You might also include evaluation of ideas, also known as ideation, as a part of demand management.

Once all demand has been captured, requests can be processed based upon your best practices and business rules for that type of request. We call this process of modeling, automating, measuring, and enforcing rules as "digitizing" the management process. You can use standardized processes out-of-the-box or you can tailor to match existing processes. Every typical project, such as new products, bug fixes, upgrades, vacations, or routine service requests like provisioning a smartphone, can be evaluated, prioritized, and scheduled based on the digitization of your company's best practices and policies.

With digitized processes in place and a smooth flow of data about projects and resources, you have the information and real-time visibility necessary to manage status, service-level agreements (SLAs), and trends effectively. Tracking the costs of an approved idea throughout its entire lifecycle can provide information needed for sound investment and financial management. And for compliance requirements, you have reliable audit trail information needed to meet government or industry regulations cost-effectively.

Checklist: You need a better demand consolidation solution if…

- You are using multiple systems to collect, track, and resolve ideas and project requests.
- You are only tracking strategic projects, and not operational demands that still require resources.
- Requests frequently come in through the back door and are not formally managed.
- There is no consistent prioritization: the squeaky wheel gets the grease.
- The service levels for responding to and completing requests are difficult to track and report.
- There is no audit trail for requests or actions taken.

Table 1. Demand consolidation maturity phases

MATURITY PHASE	DOES THIS DESCRIBE YOUR ORGANIZATION?
Informal	Ad hoc handling of all types of requests. Phone calls and emails are the dominant types of communication.
Defined	Manual spreadsheets and limited-function tools track projects. operational and strategic projects are separate and reside in many different systems.
Managed	Operational and strategic projects are centralized into one single instance of the truth.
Measured	Reports deliver visibility into request types, cost, and source.
Optimized	Quantitative measurement and nearly continuous process improvements are instilled and become routine.

Starting option #2: Portfolio management
Many organizations continue to manage the project portfolio as a collection of individual projects rather than as a portfolio. To be effective, your portfolio management solution should enable you to govern your entire investment portfolio by evaluating, prioritizing, balancing, and approving both new initiatives and your existing portfolio of work; analyze multiple what-if scenarios; and align with your business strategy with budget and resource constraints.

Your PPM solution should be designed to give you the unified and collaborative environment that is needed to let business stakeholders collaboratively govern the investment portfolio. It should integrate and automate your strategic, financial, functional, and technical checkpoints and give you real-time visibility into resources, budgets, costs, programs, projects, and overall demand. From proposal initiation, justification, and review—to project initiation, execution, deployment, and benefits realization—your PPM solution should keep all stakeholders involved.

Whatever stage of maturity describes your organization today and whatever level of portfolio optimization you are striving for, Hewlett Packard Enterprise PPM software can help you take the next step quickly and with reduced risk or disruption to existing processes. Unlike approaches that only offer time-reporting systems and project scheduling tools, HPE offers top-down planning capabilities that are supported with bottom-up detailed project plans. A top-down planning approach facilitates rapid portfolio decision-making without requiring the creation of detailed, time-consuming project plans. For example, Hewlett Packard Enterprise PPM allows you to create staffing profiles that enable you to determine what resources and budget would be needed to support a new initiative accurately, and then use innovative optimization capabilities to help with the resource allocation process.

Hewlett Packard Enterprise PPM also supports the execution of projects and oversees the project methodology from the bottom up, allowing you to move from a reactive posture to a proactive, "management-by-exceptions" stance. Details of the day-to-day work of delivering projects bubbles up in real time with exceptions to the project plans clearly called out in the actual information that is presented. This allows project managers, program managers, and executive management to see the impact changes can have on their projects clearly and align their decisions with business objectives.

Either way, HPE offers you the flexibility to make effective portfolio decisions in a process that works best for your organization.

Checklist: You need a better portfolio management solution if…

- You have no aggregate-level visibility into time, cost, and resource information for project and non-project efforts.
- In-flight projects, strategic projects, and operational work are all managed and maintained in different systems of record.
- You are not able to get an objective analysis of the items in the portfolio; there is too much weight given to subjective criteria and "political" considerations.
- You cannot do apples-to-apples comparisons of the expected ROI or net present value (NPV) of requested projects in the portfolio.
- Processes are not automated and your staff is frustrated feeding data into the system.

Table 2. Portfolio management maturity phases

MATURITY PHASE	DOES THIS DESCRIBE YOUR ORGANIZATION?
Informal	Annual planning and budgeting are done in a black box.
Defined	Annual planning cycles are manual and present high-level business cases.
Managed	Proposal processes are automated and include business prioritization; detailed business cases and approval processes are in place.
Measured	Planning is KPI driven, supported by benefits realization, assets, or TCO analysis.
Optimized	Portfolio "what-if" analyses are performed at the budget, resource, and schedule levels; sophisticated ROI data is available from knowledge base.

Starting option #3: Project execution

The average organization is constantly juggling multiple projects, processes, and resources. Conflicts are inevitable, and with so many variables, effective management of these diverse entities can be extremely difficult.

Your PPM solution should enable you to manage your programs and projects collaboratively from concept to completion. It should allow you to automate processes for managing scope, risk, quality, issues, and schedules, so you can deliver complex projects with the highest quality and capabilities, on time and on budget.

Each week, PMO staff members spend hours or even days compiling status reports from multiple data sources. This "fire drill" required by executive management consumes critical time that could otherwise be used to manage the projects. The PPM solution should free up staff time by capturing all this information in a single repository and automatically rolling it up in one centralized dashboard. Creating a status report is an automated task rather than a looming chore and can leverage big data capabilities and analytics.

In addition to addressing the previous challenges, Hewlett Packard Enterprise PPM provides best-practice PMO processes that let you model and enforce corporate PMO standards while keeping stakeholders and team members aligned at every step. It gives you the structure and out-of-the-box processes for managing scope changes, risk, quality, issues, schedules, resources, releases, and costs—so you no longer need multiple point tools and procedure manuals. You select which process workflows you want to use out-of-the-box without losing the ability to adapt and extend these processes as your business changes.

Checklist: You need a better project execution solution if…

- Your company lacks a real-time status or health view into critical projects.
- Projects are frequently late and over the budget, creating constant headaches.
- You are having difficulty keeping your current tools, such as spreadsheets, binders, and cloud tools, up to date and in sync.
- Inadequate visibility into resource availability is impacting your staff's ability to manage projects effectively.
- You are unable to offer management hard data to support your budgetary and resource needs.

Table 3. Project execution maturity phases

MATURITY PHASE	DOES THIS DESCRIBE YOUR ORGANIZATION?
Informal	Project status reports are manually aggregated; projects are initiated at department levels.
Defined	A PMO is established and a project methodology adopted, supported by manual processes or limited-function toolsets and standard templates.
Managed	Standards and project methodology are closely adhered to; projects often meet business and technical expectations with centralized project processes.
Measured	Resource supply and demand load balancing is supported; visibility into project baselines and earned value analysis for projects.
Optimized	An enterprise PMO is established and projects consistently meet or exceed business expectations. Advanced skills management helps the organization leverage the right people at the right cost.

Starting option #4: Resource management

It can be extremely difficult for any organization to match the skill levels and availability of multiple professionals with specific project timeframes and deadlines.

The PPM solution should provide visibility into resource availability and utilization across projects and non-project work to allow better planning, forecasting, and scheduling. In addition, it should encourage resource planning and tracking of actuals at multiple levels: the staffing profile level, the project level, and the task level.

Hewlett Packard Enterprise PPM effectively delivers this visibility, managing resources from top-down planning through bottom-up execution. It balances your resource supply, giving you full visibility and control over resource demand. It also provides a clear picture of resource supply—including resource roles, skills, and level of proficiency at those skills—across the entire organization. Hewlett Packard Enterprise PPM captures resource demand from projects and operational activities that drive the organization in real time, so that you have visibility into resource requirements and you can make better decisions about where staff members should spend their time.

To fulfill demand, you can allocate resources by name, position, role, or group and then track the effort against any work item. HPE PPM even provides a suggested allocation for you automatically. Executives and portfolio decision makers get both real-time status displays and immediate access to detailed resource information on which to base decisions.

Checklist: You need a better resource management solution if…

- You are not sure your staff is always working on the right projects at the right time.
- You cannot pinpoint when a skill or resource can become available.
- You do not know how much of your capacity is consumed by strategic projects as opposed to operational activities.
- You are not tracking what tasks people worked on previously.
- It is difficult to determine what training is required for which employees.
- Resource staffing requests take too much time due to lack of automation.

Table 4. Resource management maturity phases

MATURITY PHASE	DOES THIS DESCRIBE YOUR ORGANIZATION?
Informal	Ad hoc resource management; no time tracking
Defined	Point-in-time, manual resource utilization analysis; time capture done at the project level
Managed	Real-time visibility into supply and demand for all resource types; time tracked at the phase or milestone level
Measured	Resource supply or demand balancing; time tracked at the task level; project baselines
Optimized	Comprehensive enterprise resource balancing at skill level and proficiency advanced skills management; planning by leveraging knowledge base

Customer examples

Hewlett Packard Enterprise PPM has been delivering excellent results in customer deployments for years. Below are just a few examples of actual customer experiences.

Demand consolidation: A financial services conglomerate
With more than 5,000 employees, a century of business history, and over $500 billion USD in assets under management, this U.S. financial institution provides life insurance, annuity, and investment products and services to consumers and corporations nationwide. The company prides itself as a culture of continuous process and practice improvement that proactively strives for optimal efficiency and performance.

Prior to HPE PPM, the company used a manual and inconsistent process for identifying and evaluating its IT project portfolio for the year. As the result of not having a process and automated toolset to access the value of each project vis-à-vis corporate goals and objectives, projects could be funded and executed without full consideration of the underlying business case and strategic alignment.

Non-strategic projects were implemented to the detriment of other projects that would drive corporate objectives. This problem was further exacerbated by the fact that the company did not have a complete view of the project demand queue; the company did not have the opportunity to comparatively assess value of all projects under consideration comparatively. Prior to deployment of HPE PPM, 10 percent of the company's IT budget was expended on non-strategic projects.

Hewlett Packard Enterprise PPM Demand and Portfolio Management modules now govern all decisions regarding project rationale and prioritization. Over the three-year period after HPE PPM deployment, the company consecutively recovered $3.1 million USD, $8.1 million USD, and $10.6 million USD annually that it directly attributes to the HPE PPM solution. HPE PPM brought increased visibility and oversight to systematically prevent non-strategic projects that were, at best, nothing more than a net cost to the company.

Absent from this analysis is the positive business impact that a strategic project might yield to the company, including staff savings through process automation, increased revenue, reduced liability, and more. Following are the benefits of deploying the HPE PPM solution.

- Prior to HPE PPM, the company described the effort for submission and approval of projects as a "massive financial effort"; averaging 45 days to achieve financial sign off. After adding HPE PPM, projects are approved within 10 days.
- HPE PPM recouped 19 percent ($250,000 USD), 48.3 percent ($2.2 million USD), and 68.9 percent ($1.7 million USD) of the annual labor budget by reducing change order requests.

- HPE PPM consistently reduced labor costs attributed to processing change orders by 19 percent, 48.3 percent, and 68.9 percent over three years post the deployment period, saving the company $1.7 million USD NPV in labor expense.[5]

Portfolio management: Deloitte Consulting
Deloitte is one of the largest professional services organizations in the world. The firm provides audit, consulting, financial advisory, risk management, and tax services to clients. It operates in nearly 150 countries, employs approximately 225,000 people globally, and in 2015 had revenues of $35.2 billion USD.

Realizing there was a lack of visibility of investment requests and approved projects across the business, hampering optimization of resources and investment, Deloitte turned to HPE for answers. Ferne King, Director, Investment and Growth Forum, Deloitte explains, "When we began our journey to more closely align our portfolio of projects with our strategy four years ago, we were a much smaller organization with a lot fewer people, and we could manage the process of portfolio and project management manually. Since then, business case submissions have significantly increased and we have grown substantially, particularly in the past three years where we have achieved a growth rate of over 20 percent. Consequently, we found we were unable to capture all of our key initiatives in a timely plan and we had a limited static view of the firm's portfolio. It became clear that we needed to streamline and automate the process of portfolio management and also managing our projects."

Benefits of implementing the HPE PPM solution include:

- Holistic, prioritized view of the firm's portfolio of initiatives enabling alignment to individual business units and the firm's strategy
- Valued reputation of doing the right things at the right time
- Ability to spend more time on analysis of priorities against strategies
- Ability to view initiatives by investment category, type of initiative, or by sponsoring service area (not just technology initiatives)
- Increased understanding and realization of ROIs and outcome management
- Significant outcomes from initiatives over a three-, six-, nine-, 12-month rolling future timeframe with ability to show impacts and improve communications of these impacts[6]

Project management: Banco Central do Brasil
Banco Central do Brasil (Central Bank of Brazil) is Brazil's highest financial authority. Its mission is to ensure the stability of the currency's purchasing power and a solid, efficient financial system for Brazil's economic stability and sustainable development.

The Banco Central mission includes: supervision, regulation and organization of the national financial system; sustaining the information system of the Banco Central do Brasil (Sisbacen); and the formulation and management of monetary, foreign exchange and credit policies. Its technology goals center on defining and managing programs and projects to support overarching strategic goals.

Hewlett Packard Enterprise Project and Portfolio Management (PPM) was implemented to fulfill requirements for detailed monitoring, reporting, and auditing of financial planning and execution of corporate projects while maintaining security and usability for project managers and the PMO. PPM was integrated to the legacy HR system to automatically preserve organizational structure, users and groups. Another important integration was made with the Banco Central Accounting System. This integration profiles projects as cost centers that automatically receive cost actuals.

[5] "ROI Case Study: HPE Project and Portfolio Management Center—A financial services company," HPE

[6] "HPE optimizes business outcomes of Deloitte's portfolio of projects," HPE

Banco Central do Brasil has a long-standing partnership with Hewlett Packard Enterprise Software Professional Services (HPE PSO). The bank engaged HPE PSO for more than two years for expert consulting and evolution of HPE PPM. In this specific project, HPE PSO and bank teams worked together to implement HPE PPMC process modules including proposals; projects; scope change and risk management; project status; financial management; portfolio management; and document management. Benefits of the HPE PPM portfolio management solution, include:

- Streamline management of approximately 180 projects per year
- Centralize corporate and IT project information
- Avoid cost of non-integrated tools
- Reduce change request orders
- Increased management process efficiencies for portfolios, projects; resource utilization; status reports; demand/project proposals; and financial performance analysis
- Calculate Earned Value (EV)
- Mitigate regulatory non-compliance risk
- Reduce costs by eliminating funding of non-strategically aligned projects
- Reduce risk of failed/cancelled projects
- Reduce budget overruns; realize operational savings
- Speed time to value
- Win 2014 PMO of the year award from the 9th Brazilian Project Management Congress

Resource management: BNY Mellon
BNY Mellon is a global investments company with $1.7 trillion in assets under management and provides investment management, investment services and wealth management for institutions and individuals.

Prior to deploying Hewlett Packard Project and Portfolio Management (HPE PPM) BNY Mellon lacked transparency into resource availability. Detailed time tracking gave a good view of the past, but there was no way to see future IT project priorities and balance resource supply and demand.

BNY Mellon deployed Hewlett Packard Project and Portfolio Management (PPM) Resource Management Module (RM). The HPE PPM Resource Management module provides a holistic and real-time picture of resource supply including resource roles, skills, and skill levels across BNY Mellon. The deployment of this software enabled BNY Mellon to realize the following benefits:

- Gain full visibility and control over resource utilization
- Identify, capture and control demand of IT resources in alignment with business priorities
- Extend solution to 13,000 users including 3,000 senior managers or non-IT resources and a pool of 10,000 IT
- Manage resource planning for 950 projects at any given time
- Accelerate time-to-market of high-priority projects
- Pace projects based on resource availability
- Avoid unnecessary costs and fragmentation of effort due to project cancellations or holds
- Track key measures: forecasted demand vs. resource capacity; forecasted demand vs. actual effort; resource pool over/under utilization
- 2014 YTD shift of 12% from tactical to strategic which equals $88,650,456
- 4% reduction in administrative activity efforts

Working with HPE

Hewlett Packard Enterprise offers a flexible range of options to customers who are interested in making the move to more effective PPM.

Our unique delivery model can help reduce risk, shorten time-to-value, and decrease deployment costs. If you decide on a traditional, in-house deployment, our HPE Software Professional Services team and partners are available to assist as needed with implementation and full deployment. Hewlett Packard Enterprise Software Professional Services provides a full set of consulting, education, and support offerings to help ensure success. Our experience involves 19+ years in service and portfolio management for faster time to value for demand management, portfolio management, resource management, IT financial management, as well as operational processes such as change or incident management.

Alternatively, HPE offers a cloud-hosted solution. Hewlett Packard Enterprise Software as a Service (SaaS) for HPE PPM provides you with a ready-to-use service, with multiple environments of PPM to support lifecycle management. As part of your team, an ITIL and PPM- certified technical account manager works with you to provide ongoing mentoring and guidance on the best practices. Hewlett Packard Enterprise SaaS makes it easy and fast to get started, enables enhanced access 24x7, and provides industry-leading availability to users worldwide.[7]

With both approaches, you benefit from our best practices, which provide you faster time to value and lower overall deployment risk. Hewlett Packard Enterprise also offers simple licensing and flexible payment plans to help better manage your expenses.

HPE PPM and the HPE Software portfolio
Hewlett Packard Enterprise PPM is an integral part of the HPE Software portfolio with the goal of helping you to perform better. The HPE Software portfolio is comprehensive, connected, and flexible and gives you control of your entire organization.

[7] As defined in the Service Uptime Commitment of Attachment C of the SLA between HPE and the customer

Answers to top six customer questions

1. Do I need to implement HPE PPM software all at once, or can I deploy functionality as needed?

   Answer: You can easily start in the area of focus most important for your organization and add capability as needed.

2. Will I need to configure HPE PPM to meet my specific requirements?

   Answer: This depends on your specific goals. HPE PPM has been successfully deployed by customers' without configuration. Other customers do choose to take advantage of our highly configurable workflow engine to roll out processes rapidly. Additionally, customers can choose to utilize our rapid-start SaaS offering with almost no configuration.

3. How do I develop and maintain momentum for my HPE PPM deployment?

   Answer: HPE best practices recommend that you do not over engineer your processes and focus on the usability of the solution. HPE best practices also recommend that you establish and communicate your vision regularly—along with progress reports. For more information, read **Best practices in project and portfolio management—Business white paper**.

4. Are HPE Consulting Services required for implementation of HPE PPM?

   Answer: Whilst not required, HPE recommends the use of consulting services from HPE Professional Services or services from our partner community to take advantage of their implementation experiences.

5. Can you provide a more formalized assessment of my organization's readiness to implement HPE PPM?

   Answer: Yes. HPE or its diverse set of partners can prepare an assessment of your organization's maturity level and determine the right starting point for you.

6. How do I avoid disrupting current operations and processes while I make the move to HPE PPM?

   Answer: HPE has partnered with some of the very best vendors to offer guidance and support to our customers who are addressing organizational change, helping to smooth the path to effective deployment. HPE Professional Services can also provide additional assistance in this area.

Summary

Effective PPM is an achievable goal. You can start at any of the four areas of focus described in this paper and derive significant benefits. You can start at any level of organizational maturity. You can start quickly or you can phase in new tools and processes one by one. But, the key is to get started.

Research and plenty of anecdotal evidence has shown that traditional methods of managing projects simply are not working. Not for end users, not for IT staff, not for the company. Until the PMO stops managing projects and starts managing business outcomes, project failure rates are likely to remain high. It is time to break the cycle and evaluate new alternatives.

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