# Deltek INSIGHT ›2019

**CP-125**

Why your project needs a project manager

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# Speakers



- Simran Ratra, Kinetek Consulting
- Project Manager with over 20 years of Corporate and Line experience in a variety of roles of increasing scope and responsibility.



- Jay Sipper, PAE
- Enterprise Business Systems principle with nearly 20 years of leadership and management experience developing and executing successful business system initiatives.

# About Kinetek

- Kinetek, a Deltek GovCon Partner and IBM Premier Business Partner is the industry leader in providing solutions for Fortune 500 companies in need of full lifecycle implementation services for Deltek solutions.

- Our services include design, deployment, testing, integration, training, and support services for Deltek Costpoint Accounting and Material Management, GCS Premier, Time & Expense, Costpoint Enterprise Reporting, Cognos BI/TM1.

- Our combination of industry consulting experience, Deltek, and IBM expertise makes us the go-to team for your every need.

- Contact us at (888)-546-3835 or visit us at www.kinetek.com

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www.kinetek.com

# About PAE

- From its founding in 1955, PAE has offered enduring support for the essential missions of a wide range of customers, including the U.S. government, its allied partners and international organizations. To support their customer's complex missions around the world, PAE's current portfolio includes capabilities in aviation, capacity building and stabilization, critical infrastructure, expeditionary logistics, identity and information management solutions, integrated security solutions, test and training ranges, and training solutions; and enterprise-level technology products and software.

- Visit us at www.pae.com

# Introduction

# Agenda

- The Value of a Project Manager
- How Kinetek Project Management helped deliver a successful implementation for PAE
- PAE's Initial Request
- Discuss how Kinetek…
    - Helped set and manage risk expectations through proper planning and communication
    - Increased vision and direction to manage project scope and costs
    - Communicated goals and performance to the stakeholders

# The Value of Project Management

☑ Manages resources

☑ Effective Communicator, both verbally and written

☑ Provides Structure

☑ Provides Schedule

☑ Ensure proper and timely hand-offs

☑ Effective use of processes

☑ Effective use tools

☑ Effective use of time

# The Value of Kinetek Project Mgmt

The Kinetek team brings more to the table than the standard role of a Project Manager. We offer:

☑ ✚ Industry Experience          ☑ ✚ Best Practices

☑ ✚ Product Experience           ☑ ✚ Flexibility

☑ ✚ Functional Experience        ☑ ✚ Leadership
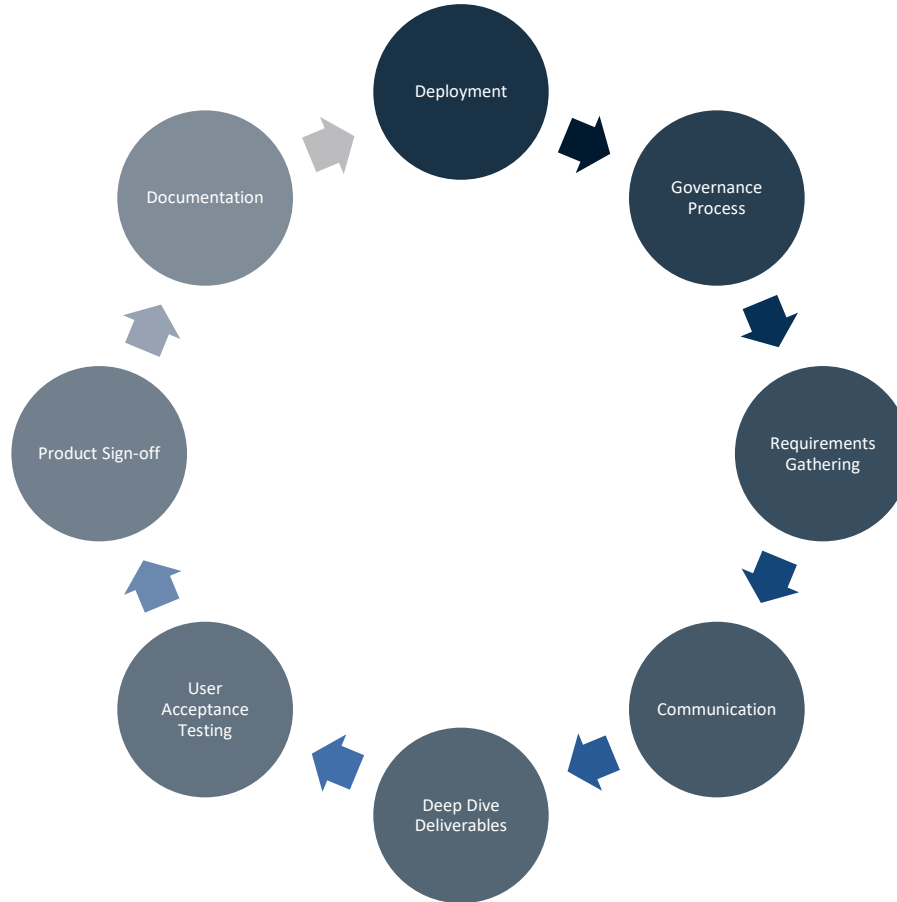
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# PAE/Kinetek Engagement

# Getting Started

- Buy-In: One of the most difficult parts of beginning with any new project is getting alignment between the Executive Sponsors and the impacted Stakeholders and Consumers.

- Scope and Complexity: PAE's IT team initiated a BI Analytics project which involved 12 stakeholders across the Enterprise. PAE requested PM services from Kinetek to provide overall guidance and manage complex requirements for 70 requests that were made cross-functionally. Complexities included

  - Multiple stakeholders

  - Competing priorities

  - Educating on the power of Analytics

  - Managing the project in a timely, efficient, cost-effective manner

- Guidance: Where do we go from here? How do we proceed? What are some best practices?" were only some of the questions we helped answer.

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# What did Kinetek Deliver?

Kinetek tailored an approach that worked for PAE's culture

- Achieved Leadership Alignment and Support
- Performed a high-level stakeholder analysis and reported to Management
- Developed a Communication and Engagement Strategy that aligned with PAE's culture
- Helped foster Employee Engagement and Adoption of the initiative
- Provided Honest and Timely Communication to all levels within the Enterprise
- Drafted Communications
- Drafted Functional and Technical Deliverable Documentation
- Managed the project to meet deliverable requirements on time and in a cost-effective way

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# Kinetek's Process

# Governance Process

- Using best practices- Kinetek developed a governance process tailored to PAE from requirements gathering to implementation of the deliverable into production

- Held project kickoff meetings to established adoption to the process

- Communicated Project Charter

- Set clear actions per role and communicated expectations

- Holistic approach

| Step | Actioner | Action |
|---|---|---|
| 1. | Requestor | Complete request form |
| 2. | Requestor | Get requisite approval(s) |
| 3. | Requestor | Send completed and approved form to Developer |
| 4. | Developer | Receive form and verifiy that all needed information is included in the form, including supporting example(s) |
| 5. | Developer | Review request for feasibility |
| 6. | Developer | Request grouped with any similar reporting objects, and initial turnaround time estimated/logged |
| 7. | Requestor/Developer | Meeting between Requestor/Developer to discuss request |
| 8. | Developer | Wire frame of request completed and sent to Requestor for approval |
| 9. | Requestor | Wire frame approved/rejected |
| 10. | Developer | If rejected, steps 8-9 repeated until approved |
| 11. | Developer | Create/modify database reporting object |

**Challenge:** **No standard process in place, not all functions engaged or "bought-in"**

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# Requirements Gathering

- Gathered high-level requirements across the functions
- Stakeholders had to describe the objective of deliverable and ROI to the Enterprise
- Kinetek performed an assessment on 70 cross-functional requests and rated the complexity and ROI of each deliverable
- Used industry experience to advise on higher ROI deliverables

**Business Intelligence Request Form**

| REQUEST ID# | | | |
|---|---|---|---|

**General**

| Action | ☐ New Dashboard | ☐ New Report | ☐ New Query |
|---|---|---|---|
| Requestor | | | |
| Requestor E-mail | | | |
| Source System ( data ) | | | |
| Similar-to Existing | ☐ Yes | ☐ No | Example: |
| Database Name/Location | | | |
| Name(s) of Testers for Validation Testing | | | |
| In your own words, please describe the intent/objective of this report | | | |

**Challenge:** Tight timeline to gather all the requirements and do a complexity and ROI assessment. Stakeholders had a tough time articulating their requirements.

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# Communication

Communication is critical in a project with this many stakeholders, complexity and volume of work

- Defined boundaries of the project

- Presented deliverable priorities to Executive team for feedback and approval

- Created transparency through posting all deliverables and project schedule on a Sharepoint site.

## BI Portfolio

| BI ID | Title | Status | Description | Justification | Requestor |
|---|---|---|---|---|---|
| 01 | 13 Month Rolling Report | Complete | A trend report by GL Account/Org across multiple partitions and years to enable us to identify possible | Enhance our internal control structure to proactively monitor changes within our balance sheet/income | Kathy Butcher |
| 05 | Cost by Subcontract Report | Complete | Identify Direct Costs by Top Level project by month by GL account. Be able to generate a report that would show | Enhance our internal control structure to proactively monitor changes within our balance sheet/income | Kathy Butcher |

**Challenge:** Needed to get alignment between Executives and Stakeholders on prioritization, needed to set clear boundaries of this initiative's objectives and what could be delivered out of the requests and what couldn't.

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# Communication

Created an Engagement and Communication Strategy for the project

- Led Bi-Weekly meetings held with Executive Sponsors to update on project status

- Submitted Weekly CPRs to BI team

- Held Monday Morning tag ups with internal BI team to set the tasks for the week, get alignment, raise outstanding issues that need support

- Engaged with Functional Stakeholders to keep them abreast of project expectations and goals

**Challenge:** **Ensuring that all internal and external resources involved with the project were aligned. Communication took place through various vehicles of engagement that aligned with PAE's culture.**

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# Deep Dive in Development

- At the start of development, individual meetings were held with stakeholders to get detailed requirements and examples
- Kinetek advised on development of the deliverables
- Product knowledge allowed Kinetek to highlight limitation of some tables
- Drove systematic solutions to objectives
- Used best practices for a technical design

**Challenge:** There were quite a few manual interventions to overcome within the processes, various levels of understanding of their internal processes, a lot of exploration during development time led to potential delays

**Challenge:** Managing and coordinating multiple deliverables in various phases of completion.

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# User Acceptance Testing

- Manage issues that came up in UAT

- Bring solutions to the table to resolve potential roadblocks

- Communicate to Executive team the risks on some deliverables and get support to move forward

- Evaluate the testing methodology to ensure efficiency

**Challenge:** **Experience allowed us to suggest various testing methods that would be more efficient. Functional business process knowledge allowed us to perform high-level validation of the data as well.**



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# Product Sign Off

Kinetek created and managed a process for product sign off that included:

- Obtaining signature from approval of deliverable

- Defining the roles that should have access to the deliverable

- Posting deliverable into production

- Drafting communication template to be used to inform stakeholders the deliverable is in production

- Drafting a user guide that explains the deliverable to the end users

Customer signs manually here

Signer name in print: James Jones

Save changes  Cancel  Clear

**Challenge:** **Getting the client to adhere to the complete governance process to include a formal signoff was a cultural change for this client. We managed to get them to adopt.**

# Deployment

- An Engagement and Communication Strategy around Implementation was created for the Enterprise.

- Included Functional Leads performing a demo to Executive Team

- Drafting Communications from Executives to various stakeholders

- Drafting Communication from Functional Leads to End Users

- Scheduling Lunch and Learn Demos for all Functions to see each other's deliverables

| Communication | From | To | When | How | Messages |
|---|---|---|---|---|---|
| Demos of Deliverables to Executive team | Internal BI Team / Charlie Peiffer | Executive Team | 2 days Before Scheduled Demo | Email | Intro to project Status of project Demo of 5 deliverables |
| Demos of Deliverables to Executive team | Functional Leads | Functional Teams | After demo | Team Meetings | Inform teams about demo to the Executives |

**Challenge:** Managing around competing priorities and tight schedules proved to be difficult. Kinetek consistently emphasized the value of engaging with the stakeholders in various ways to increase adoption and buy-in.

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# Final Result

Hear directly from our client

Questions?

# Thanks for joining us

- We hope this was your best session of the conference!
- Yes – You need a project manager we can provide assistance both after this session or at our booth #3
- Yes – We are passionate about project management, planning, and risk management and things that make others run for the hills!
- Come see all the we have to offer at the Kinetek booth #3 in the expo hall.

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## Next Steps

1. Complete the session survey in the mobile app.

2. Utilize the Post-Event Toolkit to share what you've learned.

3. You can download Continuing Education credit information from your certificate hub link. The link is in the mobile app and will be emailed to you after the conference.

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❯ Available presentation PDFs are in the Insight Attendee Portal (Schedule Builder) and in the mobile app.

❯ Online and mobile app access to this year's presentations expires on March 1, 2020.

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