



# TPG 5-Phase Method

The Professional Way to Optimized Project & Portfolio Management



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The safe and easy way to your individual project and portfolio management solution

Creating a project and portfolio management (PPM) solution requires extensive experience. Industry-specific expertise and solid process knowledge are crucial to the successful implementation of a PPM system into existing business processes. The TPG 5-Phase Method is based on our 20 years of consulting for large and mid-sized companies in all industries. This professional approach enables us to implement your PPM system quickly, successfully, and in a goal-oriented way.

## PHASE 1: SOLUTION DESIGN – CLEAR DEFINITION OF REQUIREMENTS IN TWO STEPS



- ▶ **Initial situation:** The group agrees dates for the workshops. You have invited all the relevant specialists in your company to participate, including staff from the project organization, management department, controlling and PMO.

## KICK-OFF WORKSHOP AND RECOMMENDATION FOR FURTHER ACTION

The goal of the first meeting is to obtain a clear understanding of your current situation as well as of the goals of your enterprise-wide project management solution. You'll start by seeing an overview of Microsoft PPM so that everyone understands the system's capabilities. TPG's specialists will then collect all the requirements for the system, analyze your existing processes, and make some initial suggestions for proven approaches to meet these requirements. You'll receive a report that includes all results as well as some recommendations for the next steps. Depending on your company's current situation, we may recommend that processes are optimized first before any work is undertaken on the IT solution. You may decide that your current need is for a resource management solution rather than a PPM system.

## WORKSHOP ON PLANNING PROCESSES

This workshop is the next step and deals purely with project creation, time tracking, and resource management as well as the appropriate processes, which we will look at separately from the IT solution. This high-level solution concept will give you a clear idea of what the next steps are and which tools are best adapted to your needs – Microsoft PPM or perhaps solutions based on SharePoint or Excel.

## TRAINING ON PPM BASICS AND CONFIGURATION WORKSHOP

If the previous workshops have shown that Microsoft PPM is the right solution for you, the next step is a two-days Microsoft PPM course on the basics for your core team. As a result of the course, this team will have the knowledge required to make the relevant decisions. The course is an important prerequisite for the next stage – a configuration workshop that defines your new IT solution.

- ▶ **Result:** At the end of Phase 1, you will have a comprehensive concept for the overall solution. This includes recommendations along with an implementation schedule and a list of deliverables for the implementation phase. They form the basis of our detailed and transparent implementation proposal for your project management solution.

## Microsoft Project and Portfolio Management (PPM):

PPM is an enterprise-wide project and portfolio management solution that provides a planning, information and communication platform across all projects and departments.

Microsoft uses the term PPM to describe the grouping of Microsoft Project Professional, Project Server and Project Web App, the browser-based front-end. As it is embedded in the SharePoint Server with the business intelligence, reporting, document management, list management and workflow components, everyone in the enterprise – from general management to the project leader and project team members – can use a common collaboration platform.

Project Online is the cloud-based Project Server 2016 solution.

## PHASE 2: IMPLEMENTATION – BUILDING YOUR PROJECT MANAGEMENT SOLUTION



- ▶ **Initial situation:** As a result of the Solution Design Phase, you now have the requirements emanating from the different user groups; you have also defined the interfaces to and from the external systems, and documented and fulfilled the system requirements.
- ▶ **Approach:** Working in tandem with your technical specialists, we install your PPM solution and integrate it into your IT environment. The data we collected during the workshop is transferred to the pilot system. If necessary, we can program extensions to the complete solution and integrate them step by step.
- ▶ **Result:** The technical implementation of the solution is complete. The system now has a sufficient range of functions to support the transition to the pilot phase.

## PHASE 3: THE PILOT – RIGOROUS TESTING



- ▶ **Initial situation:** The pilot team starts using the customized solution, extended with interfaces and specialized functions, in their own environment.
- ▶ **Approach:** The pilot team consists of your project manager and selected key users. It will be trained in the customized system. Pilot team members test the solution in real-life conditions using clearly defined scenarios and test procedures. They document all of their results, which may lead to the pilot system being modified, if necessary. To ensure the success of this phase, it is essential that both teams meet regularly; we recommend an interval of 1-2 weeks between meetings.
- ▶ **Result:** The fully configured solution is ready for production use. The pilot and project teams approve its release from a technical and content-based standpoint.

## PHASE 4: ROLLOUT – THE OPTIMIZED SOLUTION GOES INTO PRODUCTION



- ▶ **Initial situation:** The PPM solution is released for rollout.
- ▶ **Approach:** All of the pre-existing tools are replaced by the new enterprise-wide solution. Your trained administrators transfer your existing projects and documents to the production environment. Your IT department starts deploying the solution to users' workstations. In parallel, we run role-based training for users with up-to-date, company-specific data and structures related to the work processes of each job function. This enables users to see how the solution will make their own work easier. Depending on the scope of your EPM solution, it might be advisable or even necessary to customize the training documents beforehand.
- ▶ **Result:** Your new project management solution is being utilized by trained users in all areas. It will be used by individually trained staff in all areas.

## PHASE 5: PRODUCTION – SAFE OPERATION WITH COMPETENT SUPPORT



- ▶ **Initial situation:** Your PPM solution is fully integrated and deployed.
- ▶ **Approach:** Your personalized project management solution is an investment in people, products, and processes. It will be used for many years and become a part of your everyday work. TPG The Project Group supports you with regular maintenance, staff coaching, and fast support. We can also adapt the solution to new system environments or requirements. The data and knowledge amassed by the system underpin ongoing productivity improvements.
- ▶ **Result:** You benefit from active support during the entire life cycle of your solution. In case of questions the experts of TPG The Project Group will help you.

### The alternative: TPG QuickStart- Fast Results at a Fixed Price

The TPG 5-Phase Method is the detailed way to implement a customized Microsoft PPM system, while TPG QuickStart provides a pre-configured PPM solution. This meets most key requirements and is ready to use quickly – at an affordable fixed price.

#### PRECONFIGURED STANDARDS

TPG QuickStart is a preconfigured solution based on Microsoft Project Server 2013 or 2010. This approach gives companies a fast, cost-effective and successful way to implement Microsoft PPM. It combines generic project management processes with best practices from various industries, giving you the benefits of a PPM solution in just a few days. The platform is ready to use immediately and can be extended as your company grows, eventually becoming an enterprise-wide solution.

TPG QuickStart gives you immediate access to proven project management methods and functions. It includes a pre-configured security concept, project templates, a pre-populated enterprise resource pool, views and reports, and risk and issue lists for one project lifecycle.

Alongside basic functions like project creation, resource planning, time management and analyses, TPG QuickStart also includes proven, calculated fields, selection lists, tables, filters and calendars. This feature set ensures full support for portfolio management functions.

#### EXTENSIONS TAILORED TO YOUR NEEDS

If you want to extend your system later, we'll be happy to help. For example, you may decide to add automated workflows, personalized reports or the integration of external business systems such as SAP.

Mehr Info unter [www.theprojectgroup.com/quickstart](http://www.theprojectgroup.com/quickstart)

#### IN CASE OF QUESTIONS

Give us a call on +49 89 615593-56 or email us at [info@theprojectgroup.com](mailto:info@theprojectgroup.com)

# International TPG® Contacts

Competent Consulting and Intelligent Solutions for Your Higher PM Maturity Level

With several subsidiaries in Europe, the USA and the MEA region as well as a global network of authorized partners, TPG provides its services to large and medium-sized companies in all industries and on almost all continents.

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