

BUSINESS DRIVEN PMO SETUP

Top 200 Tips for PMOs



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Top 200 Tips for PMOs

These 200 tips for PMOs provide a top ten list for 20 different PMO knowledge areas. Here you will find practical tips, insights, and guidelines applicable to project organizations of all shapes and sizes.

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TOP TEN LIST #1: PMO SETUP

Tip 1: Start with a "virtual" PMO. For many organizations, not just small ones, a "virtual" PMO can be a great way to start. In the "virtual" PMO model, a sole individual or very small team is tasked to quickly get things set up and started, such as processes, policies, tools, and dashboards, etc, with minimal debate and distraction. Once set up, the manager of the "virtual" PMO, who may or may not be a manager leveled individual within the company, continues to maintain, improve, and promote the PMO to ensure that it meets the needs of those served by it and is positioned to take on further PMO responsibilities with time and success.

Tip 2: Establish a PMO Charter. Seek to establish a charter for the PMO that sets the tone of the organization and of the value added delivered. To start, keep it simple and ensure the participation of others in the development of the charter for "their" PMO. Where possible and measurable, align the charter of the PMO to enabling, facilitating, and achieving the key business objectives of the firm such as revenue growth, time to market, cost containment, customer satisfaction, productivity, and quality.

Tip 3: Beware of "Community of Practice" black-holes. A project management "Community of Practice" offers the promise to PMOs of increasing project management knowledge and skill throughout the organization. However, in far too many cases, the focus and effort to create a "Community of Practice" takes on a life of its own and becomes a black-hole in the organization where too much work goes into it and too little results come out of it. Seek balance to ensure that a "Community of Practice" initiative quickly adds value and leverages already existing works, rather than becoming an exhaustive, self-centric, effort unto itself.

Tip 4: Keep it simple. First and foremost, bear in mind that few PMOs have had start-up difficulties or have failed because things were too simple. Rather, complexity and too much detail in things are likely to be a far greater problem and contributor to execution difficulties and potential failure. So, be realistic and be balanced. Keep things simple, at least to start. A good foundation can enable lasting success and continual improvement. For example, don't worry about sophisticated processes at first, but at getting the basics in place. Birth precedes maturity.

Tip 5: Seek to fully use what you already know and have. When setting up a PMO, there can sometimes be a rush to evaluate and implement new tools, in particular PPM tools. This rush to judgment can often result in selecting a tool based more on vendor supplied criteria rather than specific business use case needs of your PMO. Seek to first fully utilize the tools, platforms, and capabilities that you already have. Then, based upon your identified needs and improvement opportunities, evaluate vendor tools and service offerings that best serve your PMO.

Tip 6: Think processes, not methodology. Few people will read methodology documents. And, usually, they are static and quickly become out of date. Methodologies often give an illusion of project management consistency, when in reality most users find them too detailed to use or too time consuming to follow. Focus on net, streamlined processes that answer not just the "what is to be done", but the "who, when, where, how, and why" of the work effort as well.

Tip 7: Establish the components of your PMO architecture. There is no one vendor application or tool that does everything for your PMO, nor should it. Identify all of the tools, technologies, and services that support the project management office such as desktop applications, server applications, collaboration platforms, internal and external informational sites and services. Align project management maturity and capability maturity objectives with improvements to the architecture. Seek to first use the lowest level of technology architecture that gets the job done.

Tip 8: Identify what type of technology buyer you are. No one vendor has a lock on the market when it comes to tools and applications for your PMO. Nor can any one vendor give you an automatic guaranty that their offering is truly the best for your PMO and set of needs. So, when it comes to buying technology there are several factors to consider. One of the most important factors is the type of technology buyer that are you. Are you highly innovative and prefer to implement brand new technologies? Are you an early adopter? Or do you fall into a buyer type of early majority, late majority, or even a laggard? There is nothing wrong with any of the buyer types. In fact, you need to align your technology acquisition strategy and purchases with the buyer type that is best for your company and working environment. By understanding and knowing your buyer type, you can purchase and implement the vendor offerings that are best for you whether that is the latest bells and whistles or a time-tested, mature product that already enjoys an established customer base.

Tip 9: Use PMO dashboards to drive the PMO strategy. Many people think of PMO dashboards as something you can only get when you purchase a complex and costly PPM application. The dashboards that you get from your PPM tools, for the most part, are excellent, but don't limit your dashboards of key PMO information to only that of your PPM application. For one, not everyone in the organization will be authorized or have access to your PPM application. And two, you will no doubt want to "push-out" key PMO information and measurements to the executive and leadership team that may not be, or ever be, contained in your PPM application. Use PMO dashboards to drive your PMO strategy.

Tip 10: Create a journey, rather than destination, mindset. Sometimes, those that make up an organization can be too impatient for immediate success when it comes to the introduction of change. Whether implementing new systems, new programs, or new policies, often the introduction of change will not be a walk in the park. Usually, those with a destination mindset are too quick to rush to judgment and too quick to become frustrated when things do not work quite right. Establish a journey mindset within the organization that sets an expectation up front that execution difficulties are to be expected and should serve as input to get things right and not a reason to give up on the journey.

TOP TEN LIST #2: PROJECT PORTFOLIO MANAGEMENT (PPM) SOFTWARE SELECTION PROJECT

Tip 1: Treat PPM software selection as a project. When selecting a PPM solution, manage the selection process just as you would a project. Applying good project management techniques in the effort will ensure that the solution you select best meets the requirements for which the solution is intended and justified. A rich in function solution that provides features that are not needed may not be better than a simpler solution or approach that meets the core needs of the organization. Likewise, a simple solution might not provide long term viability as the organization matures. Use project management techniques to ensure focus is placed on needs and requirements as opposed to vendor bells and whistles.

Tip 2: State the business problem. State the business problem driving the selection of the PPM solution. Does the current system or tool fail to provide the needed functionality for managing projects and resources? Do specific needs exceed the abilities of the current system? Is project performance below management expectations? The first two problems are more easily addressed from a tool perspective, whereas the third is more problematic. If processes are flawed or non-existent, implementation of complex software will not resolve them problem; rather it will add to it.

Tip 3: Set improvement objectives. In order to define and prioritize requirements, set improvement objectives early on in the PPM tool selection process. The project manager for the PPM software selection project should document and gain agreement for both the current state as well as the desired state. And to achieve the goals of the desired state, set measurable objectives to be achieved. This will keep the software evaluation and selection process on track and aligned to business needs, rather than vendor software bells and whistles.

Tip 4: Document the proposed project management process. Before continuing with software selection, document the proposed project management process. If the current project management process is not working effectively, correct the process. If specific project management goals are not being met, perform root cause analysis to determine the required improvements in the current process. Until such time as the project management process has been thoroughly documented, hold off on further PPM software selection activities.

Tip 5: Integrate the appropriate software tools into the project management process. Use your project management processes to contextual show how the various software tools and applications are used throughout the entire project life cycle. Document the inputs, outputs, tool usage best practices, tips and techniques. Do not limit tool integration to just the project portfolio management application.

Tip 6: Generate requirements from process mapping. Process mapping will identify requirements critical to the success of the PPM software application. Use process mapping to arrive at a full view of requirements including both the requirements to be addressed by the PPM application and the requirements to be addressed outside of the PPM application.

Tip 7: Select a short list of three vendors. A small number of vendors are desired for the short list. The detailed set of requirements will result in identification of needs that can best be met by two to three vendors. Too many vendors making the short list is an indication that requirements definition has not produced differentiating features and that any product can do.

Tip 8: Test the vendor products. Request that the vendors provide a testing environment for their software. Test each of the shortlisted vendor product offerings with data that best represents your business environment. Used experienced staff that understands the how the products work to evaluate the capabilities of the software and results achieved of the product tests.

Tip 9: Judge the vendors. All vendors have strengths and weaknesses. Before making a final decision, judge the vendors on their track record. Key considerations include their reputation, customer base, years in business, financial condition, and long term strategy. Seek to discuss the performance of the vendor and their offering with at least three customer references. If the vendor and their product were successfully implemented at organizations similar to your own, then you can expect a similar success.

Tip 10: Select a vendor. Be mindful that there is a point of diminishing returns on the time that is spent in evaluating vendors and their product offerings. The leading software solutions will address a majority of the business requirements of most customers and few customers will implement and use all of the features of the vendor's product. While the identification of all costs is important, too much focus on price can overshadow other vendor selection criteria such as how well the product meets the needs of all of the intended users, how well it works with your existing architecture, and the extent to which it can be easily and effectively used in support of the project mix of your PMO.

TOP TEN LIST #3: JUSTIFYING AN EPM TOOL

Tip 1: Alignment with strategic objectives. Reaching long-term business goals often requires investing in the right business activities now. With an Enterprise Project Management (EPM) tool, you can identify, prioritize, and select projects that best support your strategic objectives as well as align your resources accordingly. And, by routinely evaluating and adjusting the project portfolio, you can ensure continuous alignment with your business objectives.

Tip 2: Faster, more informed business decisions. An EPM solution can provide visibility into your project portfolio for monitoring performance, visualizing trends, and identifying business gaps. With these capabilities, you can make informed decisions on how to proceed with existing projects, make tradeoffs, and pursue new opportunities. Making accurate decisions quickly can be of tremendous business value and is a key consideration in justifying an EPM tool for the organization.

Tip 3: Continuous process improvement. Project organizations are increasingly standardizing their processes to improve operational efficiencies, increase cross functional teamwork, and more effectively manage projects of different types and sizes. With an EPM solution, you can implement a common framework for project portfolio management guided by proven best practices, resulting in better management and control of projects as well as identification and implementation of process improvement opportunities.

Tip 4: Increased customer satisfaction. Customer satisfaction often is more than finishing projects on time, within budget, and within scope. The delivery process must also engage the customer, involve the customer, and meet the customer's expectations. An EPM solution enables you to ensure a high level of integrity to the project delivery process. The end results are project plans that reflect realistic schedules, resource requirements, and budgets. Hence, so you can set, communicate, and meet achievable milestones for more consistent project delivery and higher levels of customer satisfaction.

Tip 5: Better collaboration and coordination. As businesses become more complex and geographically diverse, structured communication is vital to ensure teams share common goals and work together effectively. An EPM solution provides access to timely business-critical project information, so teams can share knowledge, better collaborate to complete tasks, and communicate progress effectively to manage risks and accommodate project changes.

Tip 6: Empowered project teams. Project team members make high-impact decisions as part of their daily routines. Businesses are increasingly relying upon project managers and are seeking ways to equip them with the tools they need to perform even better. With an EPM Solution, project managers, project team members, and the leadership team can access the latest project information resulting in more efficient time management, better communication and decision making, and increased accountability.

Tip 7: Effective resource deployment. Many organizations struggle to deploy resources effectively. This can lead to higher costs, project delays, and missed opportunities. An EPM Solution can help you more accurately assess resource commitments, deployment alternatives, and to deploy resources effectively across your organization. The end result is having the right people on the right projects at the right time for optimized delivery.

Tip 8: Ability to strategically hire. Without understanding long-term workloads and resource capacity, companies can experience hiring-firing cycles. Such cycles are inefficient and often result in higher overhead, lost knowledge, and very poor employee morale. By providing visibility into the overall work commitments and resourcing capabilities, an EPM solution helps a company achieve a balance of

strategic recruiting, outside contracting, and potentially outsourcing to achieve the long-term business objectives of the company

Tip 9: Fully leveraging existing technologies. An EPM solution fully leverages the existing technologies that most organizations already have in place, such as your enabling technologies, database, collaboration platforms, and desktop tools. Hence, you can get the most out of your existing investments in infrastructure, applications, and user skills, rather than incurring a duplication of investment and redundancy in capabilities. By customizing and integrating an EPM solution with your line-of-business systems, you can get a comprehensive view of your organization's activities for better management and control.

Tip 10: Providing a sustainable return on investment. The value of an investment depends on what types of improvements are gained and how quickly they're realized. By enabling increased employee productivity, faster cycle times, reduced costs, reduced rework and work around, and improved resource and time management, an EPM solution provides a positive and sustainable return on investment.

TOP TEN LIST #4: SOFTWARE AS A SERVICE (SaaS)

Tip 1: Time to value. Of the many areas of benefit that SaaS provide to an organization, one of the most significant is time to value. Unlike traditional software that often requires complex installation, configuration, administration, and training, SaaS solutions only require a browser. This enables the organization to quickly go live resulting in faster realization of benefits.

Tip 2: Try and buy. Most SaaS providers offer a 30-day free trial. Typically, this is not a practical option for traditional software that requires onsite installation, configuration, and administrator training. But with SaaS, such trial periods can be a vital and valuable way to assess, prototype, and gain consensus on the best solution to select and implementation approach to take.

Tip 3: Low cost of entry. As an attractive alternative to outlaying large amounts of budgetary funds, customers can roll out SaaS solutions to those needing the functionality with minimal involvement of the busy IT staff. The cost of entry is very low compared to installing complex solutions across the entire company.

Tip 4: The vendor serves the customer. In the SaaS business, vendors work for the customer. Customers don't have to rely upon their IT department to install, configure, administer, and support the solution. Everything is already up and running, securely, at the vendor's place of business.

Tip 5: Less risky investment. Arguably, SaaS offers a less risky solution than traditional software installed on the IT infrastructure of the customer. And, instead of spending a considerable amount of money up front, customers pay for the software as they consume it and, typically, with no long term obligation or financial commitment. The monetary risk is considerably less and much easier to mitigate.

Tip 6: Best in class data security. Most SaaS vendors understand all too well that application data must be backed up religiously and that security is a top priority. Customer IT departments are typically pulled in many directions and often can't be as focused on one solution. Hence, customers can rest assured their data security is probably better with a hosted solution, not worse.

Tip 7: Influencing product quality. Most customers of traditional installed software have very little ability to influence the development of new product features or to bring about changes and enhancements to quality of service. Your SaaS provider understands all too well that it is just as easy to switch relationships with SaaS providers as it is to enter into one. As a customer of a SaaS solution, you will have a much greater opportunity to influence product and service quality via your ongoing relationship with your provider.

Tip 8: Reducing capital expense. In addition to technology and operational benefits, SaaS offers many companies the financial benefit of eliminating the capital expense associated with new application deployments. This not only is attractive to the CFO, but can also result in an acceleration of the project approval process because SaaS solutions are typically treated as operating expenses and simplify the corporate review process.

Tip 9: Meeting short term solution needs. Often times, business units within a company have interim solution needs such as product launches, new office openings, organizational transitions, and business development initiatives. Typically, the application solution needs of such short term endeavors cannot be easily met by the IT department or even focused on due to other priorities. SaaS provides an easy and flexible alternative to meeting short term solution needs as SaaS offerings can be easily acquired, used, and terminated when no longer needed.

Tip 10: Low cost of exit. SaaS solutions are just as easy to terminate as they are to start. Often times, a key issue that internal information technology organizations have to deal with and manage to is how best to replace a solution or technology. And, in addition to the technical and application transition considerations are the people considerations such as no longer needing or being able use resources that were dedicated to supporting the solution. With SaaS, these resources work for the vendor, not customer, making it much easier for the customer make solution decisions without having to worry about staffing consequences.

TOP TEN LIST #5: PROJECT PORTFOLIO MANAGEMENT

Tip 1: Start at the top. Start at the top with senior management buy-in and participation. Senior management buy-in is required to achieve consensus, motivate, and to ensure adherence to the processes, tasks, and activities required to manage the project portfolio. Without senior management participation, project portfolio management doesn't work and you are likely to end up with, or return to, a squeaky wheel gets the grease mindset for those involved.

Tip 2: Avoid the Big Bang. Don't overwhelm the organization with a "big bang" approach. Each organization is different in terms of its level of maturity and ability to handle change. A phased approach should be used based on an assessment of the company's abilities. In implementing PPM, seek to identify your strengths and weaknesses, use a proof of concept, and roll out PPM with toleration for information that is not perfect. And whatever approach and tools are selected, don't go too long without showing results.

Tip 3: Develop a governance process. PPM implementations with a strong governance structure will be more likely to be accepted and to work. Things to consider include: timing, decision style, organizational level, thresholds, decision criteria, and decision making. Understanding each of these areas will help structure an effective governance process for the organization.

Tip 4: Use a proven PPM tool. PPM involves tradeoffs of value, cost, resources, and risk. This can quickly become complex and requires software that can mathematically weight, balance, and optimize a portfolio in a seamless manner. In selecting PPM tools, organizations should look not only at the breadth of functionality the tools offer, but also at the vendor's experience in PPM. With the evolving market for PPM tools and solutions, vendors who have the most implementation experience are the ones who are likely to have the most sophisticated and scalable solutions.

Tip 5: Forgive human errors, but not process errors. Don't assume things will automatically play or can run on auto-pilot. Business dynamics and changing conditions prevail and require portfolio agility, the ability to stay current with your investment status and respond to changes. Also prevalent can be legacy attitudes, behaviors, and quiet dissension from those that fared well under the old system. Expect human errors and execution difficulties. In fact, embrace them, as they can lead to an understanding and resolution of those things in the process that led to the problem in the first place.

Tip 6: Use the tool in your operations reviews. Use the capabilities and outputs of the PPM tool to make decisions. If different tools, reports, and data are being used for management and review, it won't take long for the support for the PPM tool to dissipate. Conversely, if the PPM tool is used as the driver of portfolio management operations, then all involved will get and stay on board.

Tip 7: Use executive dashboards. Few executives will take the time to login to your PPM tool much less navigate through reports or search through data. They will no doubt want the PMO to have and use and master the PPM tool and its capabilities, but they themselves may or may not be so inclined. Whether within your PPM tool or external to it, maintain high-level executive summary dashboards that serve to both provide an executive overview of the status of the top projects of the portfolio and to provide direct access to the appropriate area of the PPM tool where useful reports and data can be immediately accessed. Keep it simple.

Tip 8: Be open to project failures. Most project management methodologies anticipate project difficulties and provide monitoring and controlling processes for change, issues, and problem management. However, the resulting mindset for the project effort can often be singularly focused on

getting the project back on track to the exclusion of any real consideration given to the fact that the project may very well be failing. Be open to the possibility that the project effort could be failing and should be scrubbed from the portfolio.

Tip 9: Anticipate business opportunities and constraints. Economic cycles and business issues can impact the project portfolio both positively and negatively. Many of these new business opportunities and constraints can be identified and acted upon early to manage the portfolio and to confirm the integrity of the programs and projects of the portfolio. Being continually aware of and acting upon these business opportunities and constraints will ensure the project portfolio is balanced and optimized.

Tip 10 - Remember who the boss is. Project portfolio management can be a tremendous discipline for management and the leadership team. It will facilitate the strategic alignment of projects and programs to the priorities of the business. However, there will come times when the business intuition and market instinct of the CEO and the top tier executives will seemingly compromise the portfolio management process and available metrics. Hence, there always needs to be a certain degree of flexibility and understanding that no matter how regimented the process is made to be, certain data points and judgments might very well fall outside of the process to no discredit of all those involved.

TOP TEN LIST #6: MICROSOFT PROJECT SERVER

Tip 1: Valuable, but not a simple tool. Microsoft Project Server is an extremely valuable application for companies seeking to engage in enterprise project management and project team collaboration. However, Project Server is not a simple tool, even for those who have used Project Server before and have experience using Microsoft Project Professional. Ensure adequate administrator and user training when implementing Project Server.

Tip 2: The difference between saving and publishing. There is a difference between saving and publishing your project to Project Server. When you are working on a project plan, you will want to save your project from time to time to protect against losing your work. However, you may not have finalized your project plan and want to continue to add information to it, review it, and/or modify it before publishing. Therefore, you save it first, and publish your project only when you believe that it contains enough information that will make it useful to other viewers of the project plan on Project Server.

Tip 3: Enterprise projects. A project is an enterprise project when you create the project schedule using Microsoft Project Professional while connected to Project Server with Enterprise Features enabled and you import the project to the enterprise using the Import Project to Enterprise wizard. In a Project Server environment, no other non-programmatic method of creating an enterprise project is possible because all projects are stored in the Project Server database.

Tip 4: Enterprise resources. A resource is an enterprise resource when it is either created in the Enterprise Resource Pool using the Microsoft Project Professional client while connected to Project Server with Enterprise Features enabled or when the resource is imported into the Enterprise Resource Pool using the Import Resource to Enterprise Wizard in Microsoft Project Professional. Resources that exist in local projects, but not the Enterprise Resource Pool, are termed a local resource, meaning that it is local to the project only.

Tip 5: Enterprise resource pool. The centralized enterprise resource pool is key and required in order to implement the advanced resource management functionality in Project Server. The resource pool contains resources and attributions that drive functionality like matching people to tasks. After you complete task planning, you can then begin the resource management process and build a team for your project.

Tip 6: Understanding the project communications life cycle. At the heart of Project Server is the cyclical assignment and update process between project managers and team members. Work assignments flow from the project plan to the project resources that perform the work and resources report progress data back to the plan. This communications life cycle flows through the following five steps.

1. Project manager publishes the plan to the Project Server database
2. Project Server notifies resources of their new task assignments
3. Team members update their progress on the project
4. Project manager receives and reviews team member task updates
5. Project manager publishes the latest project schedule

At any time throughout the project, executives can view the project portfolio of the organization.

Tip 7: Additional communication tools. In addition to the core communication between project managers, project team members, and the leadership team, Project Server provides additional features for communication and collaboration. Some of these features are native to Project Server, others leverage

SharePoint. Features native to Project Server include Status Reports, Automated Alerts and Reminders, To Do Lists, Outlook Integration, Task Delegation, and Ad hoc Reporting.

Tip 8: Understanding Windows SharePoint Services (WSS). Each time a new project is saved in the Project Server database, the system optionally provisions a new project workspace on the server running Windows SharePoint Services (WSS). The project workspace contains the WSS services customized specifically for Project Server such as document libraries, issues and risks, lists, discussions and surveys, which users access through the Project Web Access interface.

Tip 9: Understanding OLAP. Online Analytic Processing (OLAP) technology relies upon a multidimensional view of data. While relational database structures are two dimensional, OLAP leverages data cubes which contain preprocessed three-dimensional data, time-phased and aggregated by business dimension. Each time Project Server processes the OLAP Cube, it stores the data in a collection of tables labeled with the prefix "msp_cube."

Tip 10: Portfolio Modeling. Project Server offers a Portfolio Modeler Tool for portfolio analysis that allows you to perform basic what-if analysis for such things as staffing changes in a single project or across a portfolio of projects. This tool can help you improve resource assignments and avoid resource over allocation.

TOP TEN LIST #7: MICROSOFT SHAREPOINT

Tip 1: Understanding how SharePoint fits into your PMO. SharePoint is a Microsoft offering that provides the server infrastructure to support needs that information workers have such as collaboration, document storage, and the ability to inform others and to be informed by others. While understanding the technology and features of SharePoint is important, understanding how SharePoint fits within your existing PMO and how it can be used by all those involved in support of executing the best practices of the PMO is even more important.

Tip 2: Identify and replace disparate repositories. Many organizations have disparate repositories for storing information that quickly erode into a collection of information dumping grounds. Seek to identify and replace with your SharePoint the following kinds of disparate repositories:

- Documents, spreadsheets, and images stored on PC hard drives
- Documents, spreadsheets, and images stored on network shares
- Reference materials stored in three-ringed binders
- Calendar appointments and to-do lists pinned to cork boards
- Archived files stored on Zip drives and CDs
- Links for web resources found in a user's My Favorites folder
- Flipcharts and sticky notes from brainstorming sessions and meetings
- Worker knowledge stored in the heads of subject matter experts

Tip 3: Accessing structured assets with SharePoint. Structured assets are found in the databases of the formal systems of the company. Though it is easy to query and aggregate data from these systems, accessing these systems is often difficult to do and it can be challenging to teach busy executives how to login, navigate menus, and run reports to get the information they need. SharePoint makes it possible and easier to control and customize access to these structured assets as well as to consolidate data that comes from multiple back-end sources.

Tip 4: Managing unstructured assets with SharePoint. Unlike structured assets, less structured assets such as Word documents, Excel Spreadsheets, PowerPoint presentations, Visio workflows, etc, are not usually stored in databases. Contrary to what IT staff may think, these assets are stored in more locations than just file servers such as PC hard drives, email folders, removable media, as well as printed and stored in filing cabinets. By providing a manageable environment for less structured information, SharePoint enables and makes it possible to standardize, share, archive, backup and restore, secure, audit, analyze, and legitimize the unstructured assets of the organization.

Tip 5: Use SharePoint as the hub. Companies make significant investments in people and technologies. With IT staff already overburdened, it is not surprising to find little support and enthusiasm for implementing yet another complex, high maintenance vendor application. The result is that many users, despite all the advances in systems and technology, find themselves increasingly alienated and isolated from their company's information environments. Most end users will tell you that there is a missing link. Using SharePoint as a hub solves this problem and provides users with access to their information assets.

Tip 6: Continually sell your SharePoint. When you and your team discover new features, capabilities, and uses of SharePoint, don't be surprised if everyone else doesn't see the same value that you do. Take the time to show and explain the business value of SharePoint. To see is to believe and often your users need to see SharePoint in action to understand its value over business as usual approaches.

Tip 7: SharePoint isn't right for every organization. Be open to the fact that SharePoint isn't right for every organization. If you have difficulty getting people to cooperate with you or to see the value in SharePoint as a collaborative platform over other alternatives, then you and your organization may be best served by waiting until the winds of change come through. Since it is very difficult to prove the value or push a new way of thinking, be prepared to plant new ideas and be ready to act upon them when the time is right for the organization to fully embrace the change.

Tip 8: Using lists with Excel and Access. Quite often, individual departments use spreadsheets and databases for analyzing and keeping track of data. And just as often, the information technology department is completely unaware of these things. As a result, IT may have a problem when a department's spreadsheet stops working or when a department outgrows its database. SharePoint provides extensive features for integrating with Excel and Access such as creating one-to-one relationships between spreadsheets and databases to SharePoint lists providing a natural repository for working with tables, rows, and columns.

Tip 9: Managing business processes using workflows. Managing a PMO is all about managing processes and many of these processes are mostly manual. SharePoint provides extensive support for managing organizational processes by using workflows. SharePoint can generate tasks and other kinds of list items to drive movement through the workflow. Rather than keeping all the information about processes filed away where few people will take the time to find and read them, SharePoint has a workflow feature that triggers and tracks the processes associated with your documents.

Tip 10: Using Portal Sites. SharePoint 2007 provides a new kind of site template called a portal site template. The portal site template lets you define a hierarchy of sites such as a PMO site and project sites that can all be created at once. So, rather than creating project sites one at a time with site templates, portal site templates create a set of multiple sites that are intended for use altogether.

TOP TEN LIST #8: MANAGING PMO PROCESSES

Tip 1: Think process, not methodology. Methodologies are static and quickly become out of date. Methodologies often give an illusion of project management consistency, when in reality most users don't read or follow lengthy, "one size fits all sizes," methodologies. Focus on PMO processes and best practices that are scalable to project type and size and answer not just the "what is to be done", but the "who, when, where, how, and why" of the work effort as well.

Tip 2: Think processes, tools, and collaboration. There are those in the Project Portfolio Management (PPM) vendor community that say their product has everything you need to manage a PMO. While PPM tools can be very helpful to a PMO, also required are processes that are scalable to project type and size, whether used with the PPM tool or not, and a collaboration platform to share project documents and information. Though PPM tools provide some collaboration features, most PMOs seek to use the existing enterprise collaboration platform rather than placing project files and folders in an additional repository. Processes, tools, and collaboration work together and are each required to effectively manage projects and continually improve the organization.

Tip 3: Flexibility within structure. Some people believe that project management processes are by nature rigid and inflexible. This can often be a result of implementing a "one shoe fits all sizes" methodology. However, PMO processes that provide workflows scalable to project type and size enable the project team to effectively execute a wide variety of projects without being burdened by too much bureaucracy. PMO processes can provide the structure, guidance, and flexibility to truly help, not create additional work for, the project manager and project participants.

Tip 4: People oriented processes. People oriented processes anticipate and help with people's challenges and constraints and free them up to do what they do best on projects such as thinking, planning, and doing. The best processes don't create extra work; rather they streamline it or make it easier. People oriented processes serve specific purposes, ensure efficiency and consistency, and tend to become "roadmaps" for continuous improvement and knowledge sharing.

Tip 5: Process owners. Process owners can play a key role in ensuring that the PMO processes are kept up to date, useful, usable, and auditable. PMO processes or best practices without process owners will likely become outdated over time and at some point will even become inconsequential to the organization. On the other hand, PMO processes and best practices that have process owners or "care-takers" are continually improved upon by reviewing and applying lessons learned feedback and process improvement suggestions. Hence, process owners help drive continuous improvement and institutionalization of the PMO processes and best practice knowledge, skill, and execution capabilities.

Tip 6: Process reviews. Don't wait until there is a problem to review the processes and best practices of the PMO. Establish process owners and delegate to them the duty of periodic assessment of their assigned processes and best practices. Encourage them to proactively find ways to streamline and improve existing processes and to identify new processes and best practices that could be of value to the PMO.

Tip 7: Provide recognition and incentives for process improvement. How do you recognize project managers? Most of them are every good at what they do and it is expected that they will manage projects well. One approach that more and more PMOs are adopting is to provide incentives and recognition for process improvement and process ownership. Rather than experiencing the same difficulty over and over again, recognition and incentives for process improvement encourage and reward project team members to get involved. The end results are not just lessons learned documents, but practical improvement

suggestions to streamline processes, improve best practices, and eliminate defects and waste. As Edward Deming put it, "Fix the process and you fix the problem."

Tip 8: Define the "as-is" state. Quite often, it is helpful to first define the "as-is" state of a process before discussing and debating options to arrive at the "desired" state of the process. A clear understanding of the "as-is" state enables the team to discuss and debate what works well, what needs improving, and to agree upon actionable process improvement suggestions. Conversely, trying to achieve the "desired" state for a process without a full understanding and agreement of the "as-is" state can often lead to miscommunication due to differing points of reference as well as process improvement suggestions that may not meet the needs of all parties involved in the process.

Tip 9: Project management processes are more than the PMBOK® Guide. Some PMOs establish a fine project management process aligned to the PMBOK® Guide and are disappointed to find out that it is not being used throughout the organization. Some project managers may use a more streamlined process for smaller projects. Other project managers, especially outside of the United States, may use a different approach to project management such as PRINCE2. And, development teams may manage their projects using a traditional SDLC or Agile process. In managing the project management processes of the PMO, recognize that project management processes extend far beyond just the PMBOK® Guide.

Tip 10: PMO processes comprise of more than just the methodology for managing projects. A project management methodology alone is not sufficient for the PMO. In addition to the methodology, PMO processes and policies need to be put in place for such things as where specifically to store project documents, when project status reports are due, how and when project data is to be entered into the PPM tool, how and when complex and situational techniques as Earned Value Management (EVM) and Monte Carlo Risk Analysis are to be employed. Ensure that your PMO processes provide not just the "what" of the "what is to be done," but also the practical context and specifics of the "Who, When, Where, How, and Why."

TOP TEN LIST #9: AVOIDING PROJECT FAILURE

Tip 1: Project Manager Skill and Experience. A highly skilled and experienced project manager knows how to work with all stakeholders and participants to avoid project failures. Project management education and mentoring programs are essential and, along with experience managing projects, will greatly increase the project manager's ability to avoid project failures.

Tip 2: Use a Methodology. Using a structured systems development methodology is one of the critical success factors in a systems development project. Phase exits and quality control points help to ensure a successful project. For example, the functional design review after the functional design is completed is an often skipped, and later regretted, step. Manage requirements throughout the SDLC from initial definition to user acceptance testing at the end of the process.

Tip 3: Communicate Formally. Many projects fail or at least experience difficulties due to a lack of formal communications. Though time and focus is traditionally given to planning and scheduling, it is equally important to place a priority on regular and formal communications and interaction. For most project efforts, sending project status emails to a project distribution list with various file attachments, simply does not work. Formal communications need not be time consuming or overly bureaucratic; rather planned, agreed to, and executed as opposed to ad hoc or periodic best efforts.

Tip 4: Set Realistic Expectations. Often times, unrealistic expectations are set to please a customer, to meet a calendar deadline, or to fall within a certain budget amount. Such early expectations can not only be unrealistic, but they can often become, in the eyes of the customer, the real expectations and commitments for the project leading to inevitable frustration and disappointment when they can't possibly be met. Avoid unrealistic expectations by letting the project plan set quality, cost, and time expectations, rather than early commentary and opinion.

Tip 5: Initiate the Project Properly. Not initiating a project properly with sufficient time spent to define and agree the user requirements, create a realistic plan and gain buy-in from all stakeholders' means you're almost certainly destined for problems. Resist the temptation to start the project too early before it has been properly initiated. Don't be rushed into starting the work on the assumption that it will result in an earlier delivery. The reality is that poor initiation extends projects by causing rework, errors and omissions. Just say no when pushed and never start too early.

Tip 6: Ensure the Right Amount of Resources. Not having the right amount of resource or having the right amount with the wrong skill mix can be a cause of project failure. Insist that management provide appropriate resources either from internal staff or if necessary by hiring some resources on a contract basis.

Tip 7: Be Aware of Other Projects and Priorities. Don't operate in a vacuum. Project team members are often multi-tasked and may be pulled in many different directions. Ignoring these other projects and priorities will engender resentment and inaction for the team members with multiple duties. When you are unresponsive to the projects and priorities of others in times of their need, they will be unresponsive to you in times of your need.

Tip 8: Don't Forget About Quality. Everyone knows the triple constraints (Quality, Time, and Cost), but so often the management of the project has a myopic focus on budget and schedule. Quality is often left out of the picture. How often are project managers asked, "Is the project on time and on budget?" Almost always, seek to manage and measure quality so that in addition to delivering the project on time and on budget, the product of the project fulfills the user's requirements. Project Quality Management not

only will prevent rework, but enable the ROI of the project to be realized, typically a much more significant dollar amount than the project cost.

Tip 9: Collaboration technology is there to help. Increasingly, organizations are seeking to do more and more with the same level of resources. Collaboration technology can help. Whether using a vendor platform or an in-house developed framework, providing access to project life cycle best practices, completed projects documentation, and project status dashboarding can play a key role in shortening project life cycle, reducing costs, and ensuring quality objectives are met. All organizations have a great deal of content and knowledge. Collaboration technology can help to make content and knowledge, especially project management related content and knowledge, accessible, usable, and online to the task at hand.

Tip 10: Maintain a Top Projects Dashboard. Project dashboarding can be an effective way to communicate the status of top projects and the direction that they are trending. In addition to cost and time, it can be very helpful and actionable to dashboard the top projects status for quality, risk, as well as how well the project aligns to strategic objectives or compliance and oversight requirements such as Sarbanes-Oxley. Top projects dashboarding does not have to involve the use of a complex and expensive PPM tool. In fact, often times, even those organizations that have PPM tools find that a top projects dashboard can be very useful in providing the executive summary information for project status and trending, first, and prior to delving into the PPM tool for further information and analysis.

TOP TEN LIST #10: PROJECT RESCUE

Tip 1: Be open to the possibility that the project is failing. It is natural for project managers and project teams to have a task-oriented focus. And, most project methodologies anticipate project difficulties and provide monitoring and controlling processes for change, issues, and problem management. However, the resulting mindset for the project effort can often be singularly focused on getting the project back on track to the exclusion of any real consideration given to the fact that the project may very well be failing. Be open to the possibility that the project effort could be failing.

Tip 2: Recognize early warning signs. Early warning signs, both good and bad, exist in all projects. Early warning signs can be seen in just about every aspect of the project effort such as the attitudes of the parties involved in the project effort, the performance of infrastructure, systems, tools and machinery, and internal and external factors that can impact project scope, timing, and risk. It is always easier to get projects back on track that haven't drifted too far off course. Recognizing the project early warning signs helps to prevent projects from failing.

Tip 3: Beware of the last mile syndrome. Often times, project managers fall victim to the "last mile syndrome." That is, it takes ninety percent of the project time to finish the last ten percent of the project scope. This can occur for many reasons from poor project requirements and scope planning to ad hoc development rather than process-oriented iterative development. The end result often is the extension of the project for just one more month, and again, and again. If you are still waiting for your last month, look in the mirror and admit you have a problem.

Tip 4: Admit you have a problem. Many project organizations continue with failing projects instead of taking action, corrective or termination, early. Often, project managers are skilled at managing project difficulties and have the confidence to think that they can project manage their way out of any bad project and in many cases they can. However, if you don't get people to recognize that there is a problem then rescuing the project is going to be very difficult. When you identify the reluctance to admitting there is a problem, then rescuing the project becomes much, much easier.

Tip 5: Pause the project. Pausing the project creates an opportunity to regroup, establish a new plan, and restore integrity to the project baseline. By continuing a failing project, you are likely to burn time and money against the project not knowing where you are truly headed or if you are on the path to completion. Pausing a project does not need to be difficult or scary. To pause the project, you may need someone with enough vision, clout and security to say, "This project is not on the right course." Some people might think the ship is sinking and want to flee the project, but most will eagerly take advantage of the opportunity to get things back on track.

Tip 6: Audit the project. Even an experienced project manager can have great difficulties delivering a difficult, complex project. And often, organizations perform project management in an ad hoc manner without any processes or policies in place to help the project manager and all those involved in the project effort to ensure the integrity of the project. After pausing the project, assemble the appropriate members of the organization to conduct a project audit. The purpose of the project audit is not to place blame or to fix or re-baseline the project. Rather, the purpose of the project audit is to first find out the root causes for why the project is failing.

Tip 7: Assess the effort to complete the project. Restore the integrity of the project by assessing the effort, both schedule and budget, to complete the project. Often, when initially estimating projects, many project managers use intuitive estimating; they estimate from gut feel and personal opinion rather than

from historical estimating experience. Intuitive estimating may work with smaller projects; however, larger projects require experienced-based estimating. If possible, enlist the aid of someone who has experience performing the particular project tasks in order to get realistic estimates. Additionally, establish and maintain a historical estimating database within the PMO so that future projects can be estimated more accurately.

Tip 8: Validate the business case for the project. Ask yourself, “Is it worth continuing the project?” It is possible that the project is no longer important or a priority for the organization. Additionally, external factors such as new technologies and alternative solutions may render the initial approach of the project obsolete. Before proposing that the project be restarted, validate the project's business case.

Tip 9: Submit the project to governance. From a business perspective, determine if at this point in time the project still makes sense to pursue and if the project is an appropriate use of the resources of the company. Look at the value of the project and compare it to other competing project alternatives and initiatives. Perhaps previously the project was a priority, but now the project scorecard may rank quite differently. Use the governance process to gain formal understanding, approval, and support for the project.

Tip 10: Restart the project. Now that you have a new and approved project plan and new estimates, re-launch the project. Have the executive sponsor for the project communicate to the team how important the project is and take steps to ensure that the project team is prepared and mentally positive about restarting the project effort. Be mindful of all of the past project difficulties and be prepared to deal with potential roadblocks.

TOP TEN LIST #11: PROJECT MANAGEMENT SURVIVAL SKILLS

Tip 1: Control uncertainty. What we do not know is far greater than what we can anticipate. Be mindful that your project team may encounter something at any time that can put the project at risk. Expect the unexpected. Use controlling processes to manage issues and project changes and seek to be resilient, rather than flustered, to what life throws at you.

Tip 2: Refine estimates. Project leadership recognizes that estimates made during the first half of the project are inherently imprecise and will need to be refined as the project progresses. If necessary, establish confidence intervals for your task estimates and use "value of perfect information" analyses to establish the project schedule and manage uncertainty.

Tip 3: Frequent "Keep-Kill" reviews. The project emphasizes the importance and cost of upstream work by holding frequent "Keep-Kill" reviews. At each 10% interval of the project timeline or 25% interval, review project status with the sponsor and management authority and make a "Keep-Kill" decision. Identify failing projects early and take action to rescue or terminate the project.

Tip 4: Project Risk Management. The project practices active risk management. Continually assess and plan for technical risks, resource risks, budget risks, and business risks. Spot and resolve problems early and escalate issues when and where required.

Tip 5: Project Risk Officer. The project practices risk management and has an appointed project risk officer. The project has a top ten risks list with a risk plan and with mitigation strategies for each listed risk and risk event. A risk event database is maintained by the project office for review and use by the project organization.

Tip 6: Visibility. The project plans emphasize visibility. The project team, upper management, and the customer keep tabs on major milestones and deliverables. Dashboards and project summary reports are used and maintained to provide visibility into the project status.

Tip 7: Change Management. The project practices change management. Change requests are documented, proposed, and evaluated by the concerned parties prior to being resolved. The project manager should organize and evaluate changes in batches when possible so that the project is not distracted by a constant barrage of change requests.

Tip 8: Project Archives. The project practices post closing process archiving of the project artifacts. Past project archives can be useful for historical information and review. Project artifacts can be reviewed as part of project audit and performance scorecarding to assess whether or not estimated benefits of the product of the project were realized. Project artifacts can also be reviewed for potential reuse in support of new project efforts of similar scope.

Tip 9: Find a mentor. No employee wants to go to their manager for every problem or difficulty that they encounter. For one, there may be the perception that you don't know how to do your job. And for another, your manager might not be able better at the task at hand than you are, though they will likely not know it and never admit it. Seek to establish a professional relationship with a seasoned expert in project manager. Ask if they would consider being a mentor to you from time to time. In addition to developing project management skills and a project management survival lifeline, you might even develop a significant and lasting friendship.

Tip 10: Are you really a project manager? Be open to the possibility that project management may not be the job or career for you. Many valued contributors arrived at project management by accident. Not everyone has the right mindset for project management, nor enjoys it. If a different job, career, or line of work is more enjoyable and fulfills your professional aspirations, then talk with your manager about making a change. Sometimes the best way to survive at something is to get out of it.

TOP TEN LIST #12: RISK MANAGEMENT SURVIVAL SKILLS

Tip 1: Maintain a Risk Profile. Throughout the project life cycle, different kinds of risks are incurred and the overall project risk profile may change. Project risk types can include schedule, resource, financial, technical, operational, organization, political, and many others. Maintain and periodically review a project risk profile to verify and validate potential risks and plan for their mitigation.

Tip 2: Assessing Schedule Risks. Assess schedule risks by asking yourself the following:

- Is there a project plan that provides task level detail?
- Have estimates been provided at the task level?
- Has the critical path been identified?
- Is work completed regularly compared to the project schedule?
- Is there a contingency plan for schedule variances?
- Is the schedule achievable?

Periodically, or at project gates and phases exits, review schedule risk assessment questions to confirm your assessment of schedule risks.

Tip 3: Assessing Resource Risks. Assess resource risks by asking yourself the following:

- Are key personnel needs identified in the project plan?
- Are project team skill requirements clearly defined?
- Do project team members understand their roles and responsibilities?
- Are all team members trained?
- Is the development team at a central location?
- Is there sufficient manpower to complete the project?
- Is there a contingency plan for resource risks?

Periodically, or at project gates and phases exits, review resource risk assessment questions to confirm your assessment of resource risks.

Tip 4: Assessing Financial Risks. Assess financial risks by asking yourself the following:

- Is the project funding secured?
- Is the project funding adequate?
- Is the project funding based upon work-level estimates?
- Has a cost/benefit analysis been performed?
- Are benefits verifiable?
- Has senior management reviewed and approved the cost/benefit analysis?
- Is there a detailed budget for the project?
- Is there a contingency plan for budget overruns?

Periodically, or at project gates and phases exits, review financial risk assessment questions to confirm your assessment of financial risks.

Tip 5: Assessing Technical Risks. Assess technical risks by asking yourself the following:

- Are the business functional requirements defined?
- Are the business functional requirements stable?
- Will the project follow a defined methodology?
- Does the project team understand the methodology?
- Are structured walkthroughs conducted for key project deliverables?
- Is the technology new or extremely complex?
- Are all project problems identified, documented, and acted upon?
- Is the organization ready and able to support the new application?
- Do processes, policies, standards, procedures, and guidelines exist?

Periodically, or at project gates and phases exits, review technical risk assessment questions to confirm your assessment of technical risks.

Tip 6: Assessing Communication Risks. Assess communication risks by asking yourself the following:

- Are the project's goals and objectives clearly defined and stated?
- Are the project's goals verifiable?
- Have the basic goals been communicated to the project team?
- Does the project team understand and agree with the goals?
- Are all project stakeholders identified?
- Are stakeholders kept informed of the project status?
- Are project issues reported and tracked?
- Do project communication policies, guidelines, and reports exist?

Periodically, or at project gates and phases exits, review communication risk assessment questions to confirm your assessment of communication risks.

Tip 7: Assessing Operational Risks. Assess operational risks by asking yourself the following:

- Is the user's business environment stable?
- Will the existing IT environment support the application?
- Is there adequate project documentation to permit use by the client?
- Have potential users been contacted about the usefulness of the project?
- Will new hardware need to be procured?
- Will new networking equipment be needed?
- Will the produced system meet the needs of the user?
- Are the user's functional requirements testable?
- Are all project baseline deliverables under configuration management?

Periodically, or at project gates and phases exits, review operational risk assessment questions to confirm your assessment of operational risks.

Tip 8: Assessing Project Management Risks. Assess project management risks by asking yourself the following:

- Does upper management support the project effort?
- Have all project stakeholders been identified?

- Does the project manager have requisite skills and experience?
- Is there a detailed plan including time, schedule, and resources for completion of the project?
- Do the people implementing the project understand the project objectives?
- Is the project monitored and measured?
- Have client acceptance criteria been defined?
- Is there a plan to manage quality?
- Is there a plan to manage risk?

Periodically, or at project gates and phases exits, review the project management risk assessment questions to confirm your assessment of project management risks.

Tip 9: Enlist a Risk Management subject matter expert. Risk management is traditionally an overlooked and under applied project management best practice. Without formal training in risk management it can be difficult to understand and effectively apply risk management techniques. Identify and enlist the support of one of your project managers to become the risk management subject matter expert. Send them to class and enlist their proactive assistance to mentor others in risk management.

Tip 10: Maintain a Risk Event Database. Planning for risks and developing risk mitigation strategies is not a skill that every project manager has had years of experience in honing. To leverage the collective wisdom of the team, develop and maintain a Risk Event Database and continually add to it with information from new projects. This will enable the project team to understand what kinds of risks to expect and to see practical examples of how they were mitigated and to apply risk management techniques in their own projects.

TOP TEN LIST #13: QUALITY

Tip 1: Think of quality as simply conformance to requirements. Typically, you get the behavior you critique for, rather than by hope and prayer. So to ensure you get the quality that is required, clearly document and communicate your standards and then demand conformance to them. Inspect what you expect. Quality will come from that and that alone, not from slogans, posters, or even threats.

Tip 2: Take the time to do it right the first time. Why is it that there is never enough time to do it right the first time, but there is always enough time to do it over, and over, and over? Taking the time to do it right often means more and better planning as well as more and better monitoring and control. These activities do take time. But to avoid them or to rush through them almost always results in miscues that lead to project delays, increased project costs, and customer dissatisfaction. Seek to allow ample time for planning and review throughout the project effort and concentrate on getting it right the first time.

Tip 3: Recognize and avoid analysis paralysis. Yes, seek to do it right the first time, but recognize and avoid analysis paralysis. Analysis paralysis comes in several forms such as a delay in decision making, a delay in getting started, or a delay in addressing a problem. Rather than making a decision, the victim of analysis paralysis finds one reason after another to avoid getting on with things. Don't be a victim of analysis paralysis. Determine what you want to achieve, make a plan, and then execute. You can, and will, always monitor and control changes after you start.

Tip 4: Ensure project quality with a CAT. CATs are very helpful in ensuring project quality. Of course, this particular kind of CAT is not the four-legged animal with a tail that says meow. Rather it is the three key components of your project quality plan; Criteria, Acceptance, and Testing. To ensure the quality of your project, plan for quality by defining the specific criteria that must be met. Then, define the assurance process and how this required criterion is to be met. And lastly, define the acceptance process for how the criterion is to be tested and accepted. The resulting Quality Plan based upon these CATs becomes the plan of record for quality assurance and control.

Tip 5: Assess the overall quality of every project effort. Establish and use a standard quality report to assess the quality of every project effort undertaken by the PMO. Provide a measurement and rating for such things as the project manager competence, adequate amount of planning, processes understood by project participants, processes followed by participants, duties defined, deliverables met, project costs within budget, etc. And where noted, provide improvement suggestions to contribute to organizational effectiveness and continuous improvement.

Tip 6: Don't shorten planned testing to keep the project on track. Many organizations stick to the planned testing schedule and activities even when the overall project effort is running behind schedule. But there are those organizations that immediately look to shortening and sometimes omitting testing activities in order to get the project back on track. This should always be done with extreme caution and as a last resort and with management understanding and signoff. Shortening testing to preserve the project delivery date is rarely a good idea.

Tip 7: Partner with your Quality Team. Project management methodologies, especially those aligned to leading standards for project management, include process steps for quality. But often, these process steps are limited to project quality and do not provide additional and optional techniques and resources to best manage and assure quality from a broader perspective. If your organization has a quality team or a QA/QC function, work with those resources and seek ways to incorporate their knowledge, skills, and experience into the areas of the project management methodology that deal with quality.

Tip 8: Establish a quality dashboard. Often times, QA is shortened in order to bring a late project back on schedule or back on budget. But how often is a project delayed in order to ensure that it meets its quality objectives? Or how often is additional budget expended in order to achieve the quality objective? Establish a quality dashboard to both manage to the planned objectives for quality and to foster a culture and appreciation that project quality is just as critical as other project objectives such as schedule and budget. In fact, often times and in the long run project quality, arguable, is the single most important measurement.

Tip 9: Insist upon all projects having a quality plan. The quality plan is the plan of record for quality assurance and quality control. It describes how quality is measured, tested, and accepted for each work package item. Quality plans do not have to be excessively lengthy nor overly detailed. Insisting upon a quality plan as part of the project planning process and work to be completed artifacts, even for small project efforts, improves project manager adherence to generally accepted standards for project management and increases the odds that the project effort will successfully produce the product of the project.

Tip 10: Inspect the Quality Plan. Inspect what you expect. Within the Quality Plan, use a quality control table to list for each work package the work package leader, the description of the work package, the acceptance criteria, a summary of the test plan, and any supporting comments for how the quality of each work package is managed. Regularly, review and inspect the quality control table to ensure project quality is achieved.

TOP TEN LIST #14: CONTINUOUS IMPROVEMENT

Tip 1: Recognize the problem. For most organizations, a change in behavior does not come naturally. Though one might think that continuous improvement would be a natural mind set for the PMO, in reality few PMOs have a culture of continuous not to mention processes or best practices to facilitate it. Sure, lessons learned are documented as part of project closing, but they are almost always filed away and forgotten rather than acted upon. The first step in establishing a continuous improvement mind set is to recognize the problem. That is, recognize the fact that your organization does not have or could do quite better exhibiting a continuous improvement mind set.

Tip 2: Establish an enduring culture. For continuous improvement to work, there must be a relentless focus on and commitment to getting things right. Adaptability and an action oriented leadership team are inherent components of a continuous improvement culture. Resistance to change exists in all organizations to a degree and it must be recognized for what it is, an impediment to improvement.

Tip 3: Think Kaizen and Cross the Chasm. Many people advocate Kaizen oriented thinking and behavior where continual small, incremental improvements provide tremendous benefits in performance and end results achieved over time. Others advocate a Crossing the Chasm mind set where drastic change is introduced completely replacing inefficient execution rather than slightly improving upon it. In a continuous improvement culture, there is room for both approaches. And often, after achieving the mega change that is made possible when Crossing the Chasm improvement initiatives are implemented, a Kaizen mind set is required to refine, sustain, and continually improve upon such change.

Tip 4: Facilitate process-centric thinking. Process-centric thinking does not have to be overly complex. Sometimes, all it takes is a thoughtful examination to uncover significant areas for improvement. Rather than tolerating mistakes and repeat errors, facilitate process-centric thinking to continually improve, correct, and overcome execution difficulties.

Tip 5: Educate the workplace. Like any other business strategy, ongoing education of the workplace is critical in establishing awareness, developing skills, and institutionalizing the needed mindset and behaviors to bring about effective change. It is no different with Continuous Improvement. Expect and overcome resistance to change with ongoing training, reinforcement of expected behaviors, and recognition of those who are learning and doing.

Tip 6: Ensure a penalty-free exchange of ideas. In many organizations, expressing one's opinion on how to do things better may not necessarily be a welcomed activity. Management can feel threatened or pressured to act resulting in immediate resistances. And, those expressing ideas may be viewed as complainers or trouble makers. In such an environment, it doesn't take long for the potential risks of making a suggestion to stifle enthusiasm and participation in improvement oriented thinking. Ensuring a penalty-free exchange of ideas is beneficial to both the giver and the receiver of new ideas and approaches and will ensure a safe two way exchange of thoughts and ideas.

Tip 7: Use a consistent approach for projects. A consistent and structured approach for project identification and execution will provide the organization with the ability to identify, select, and manage continuous improvement projects. The continuous improvement project process should also provide post-closing process steps to continually refine the improvement project methodology and to act upon the lessons learn from the project effort.

Tip 8: Measure performance. It is not possible to improve what is not measured. Determine in advance the approach and techniques to be used in measurements. Scorecards can be useful to monitor the key performance indicators of processes that support capability and performance.

Tip 9: Communication planning. Ensure regular communications to foster collaborative interactions among leaders, stakeholders, and practitioners at all levels. Take advantage of communications techniques appropriate for the information being conveyed. Where needed, schedule face to face meetings and where not needed, use the communication and collaboration tools and capabilities of the enterprise to keep all members updated and involved.

Tip 10: Establish core values. Establish the core values that comprise the continuous improvement culture such as a focus on supporting the customer, teamwork throughout the extended enterprise, receptivity to evolving continuous improvement concepts and tools. These core values will create a sense of belonging and a common vision for all involved.

TOP TEN LIST #15: PEOPLE MANAGEMENT SKILLS

Tip 1: Acknowledge people management as a skill. Are you good at People Management?

Surprisingly, most managers respond in the positive, yet survey after survey provides quantitative and qualitative data suggesting otherwise. As a first step, acknowledge that people management is a skill unto itself and it is different from your core technical skills. If you are not good at it, work at getting better.

Tip 2: Think of people management as a role. Some people think of people management as being a boss of some kind. Being a good boss doesn't necessarily mean being your employee's friend. Rather, it entails providing direction and feedback and then doing all that you can to make sure that your employees can, and are allowed, to do their jobs.

Tip 3: Make the career of your employee a priority. The better your employees perform, the better you as manager will have performed. Ensure your direct reports have career goals and a career path and seek to establish and confirm those areas of assistance and facilitation that you can provide. Your actions on the behalf of the careers of your direct reports are the truest measure of priority you have made.

Tip 4: Find the right span to manage from. Most employees do not like micro managers as they manage to close resulting in an employee disempowerment, lack of trust, and reduction of motivation. Absentee managers are no better as they provide insufficient guidance, control reporting, and often are not even there. The optimal span is somewhere in between where you can provide direction and guidance, management review, and regularly two way communication.

Tip 5: Acknowledge end results achieved. At a psychological level, employees value and need acknowledgement of their work, both good and bad. Acknowledgement should not interfere with the employee manager relationship, rather it should enhance it. Seek to understand and acknowledge both the effort as well as the end result achieved of the employee. As always, the end result achieved should be the basis of the employee's performance appraisal.

Tip 6: Coach, counsel, and then discipline. Most project managers are high value employees that require very little management. In fact, many project managers manage their bosses more than their bosses manage them. When you are managing your team, whether project managers or others, seek to first coach, followed by counseling and finally discipline. Coaching is proactive encouragement to achieve agreed to goals. Counseling entails a closer attention to a problem identified by you with a specific request for change. And, discipline is the use of punishment as an incentive for the change that you have previously requested. Discipline should only be considered after having coached and counseled.

Tip 7: Document, document, document. When it comes to managing people, all key conversations, both good and bad, should be documented. Little, if anything, should be only verbally exchanged. Managers are, and need to be, accountable for their assessments, decisions, and actions, especially when it comes to people management. In good times, this will demonstrate good people management and keep the momentum going. In bad times, it will best serve and protect all involved; the manager, the employee, and the company.

Tip 8: Manage by agreement. Most employees understand their duties and the goals and objectives of the organization and will do everything possible to meet them. But often times, in addition to the business as usual performance objectives it can be very helpful to establish an agreement for that which is to be accomplished. And, when employees have said out loud that which they will do, you can usually count on them getting it done.

Tip 9: Translate, don't just broker the information. Passing down everything you get from above, without adding context and emphasis, isn't that helpful. Frame the direction from the executive team so your employees get well-informed and get an opportunity to remain optimistic. This will help to ensure that they can see, understand, and buy into decisions from above and relate to what those decisions will mean to their own work at hand.

Tip 10: Be objective. There are several aspects to being objective. For example, being consistent, constructive, and fair in your communication is one aspect. This objectivity will give you a solid foundation and make you appear reliable to others giving them confidence in you. Another aspect is not playing favorites. This requires discipline and attention as it is easy to find favorites in those that perform well and are likeable. And lastly, being objective means taking time to fairly and accurately observe yourself and assess how well you are doing. Often times, the first person that knows when you have done something truly extraordinary or not as well as you should have, is that person in the mirror. Take time to get to know that person.

TOP TEN LIST #16: PEOPLE ACCOUNTABILITY

Tip 1: Get a real commitment. Know the difference between a real commitment and a brush-off. Beware of best effort generalities such as "I'll try," or "you know I will give it my best shot," or "you can count on me to get it done." Get a specific commitment from the performing resource in measurable terms such as "how much, by when" to do the work promised.

Tip 2: Put commitments in writing. When you reach an oral agreement, put it in writing. This serves to both clarify the agreement that you have reached and to set a permanent reminder or expectation for the commitment. Often times, people tend to think that when they promise things verbally that it is okay to not totally live up to, and honor, the commitment. A written confirmation will emphasize the seriousness of the commitment.

Tip 3: Involve the people that have the authority. Confirm with the manager or supervisor of your performing resource that the time you need from the resource and the work to be performed by the resource is understood and agreed to. This establishes a relationship with the performing resource's supervisor and reduces the chances that the supervisor will inadvertently assign too much other work to the performing resource.

Tip 4: Be specific regarding how much, by when. Often, when resources are unable to complete assigned project tasks, it is because they had a misunderstanding of the results you wanted, the time frame you needed, or the effort needed to produce those results. Be specific regarding what you want, when you want it, and how much work effort it will take. Clarity enables accountability.

Tip 5: Inform others about the person's commitment. Don't keep commitments, especially shared resource commitments, a secret. Tell others about them. No one wants to have their professional reputation put at risk, so the more people know about the commitment that you have from a shared resource, the more likely that resource will be to ensure that their commitment to you is met. Conversely, if only the two of you know about the commitment, it may not seem as critical to your performing resource and it may seem easier to break.

Tip 6: Inspect what you expect. Project team participants need to know what you expect of them and when you expect it and the expectations need to be specific and measurable, not generalities. You must inspect what you expect regularly as your follow up sends a clear message that you expect the performing resource to follow through at their end. When you inspect, be mindful to both confirm that which has been accomplished and to offer or determine any areas of help or information that are needed to finish tasks.

Tip 7: Continually stress the importance of the task. Usually, during the project kickoff meeting the project manager presents the overall project plan, discusses the details of the project tasks, and stresses the importance of project and tasks and their critical path. However, as the project progresses, team members can often think that their particular task is not so important or critical to the project timeline resulting in missed deadlines or waiting to the last moment to finish work. Continually stress the importance of the task as team members will only view the task as important as you do.

Tip 8: Immediately confront poor performance. Don't allow poor performance to continue. Immediately confront performance that is not meeting agreed to expectations whether this is poor quality work, work that is incomplete, or work that is late. Rather than looking the other way or hoping the project team member's performance will come around, immediately step in to get things back on track. Take the appropriate actions to ensure the project team member can actually do the task, has the time and

skills to deliver what has been committed. If necessary, escalate to functional management especially if they are the cause of the problem or part of the problem.

Tip 9: Immediately praise good performance. When your team member delivers the promised work on time or ahead of schedule, always acknowledge that good performance. Tell them and their functional manager how much you appreciate their efforts and how important their contribution was to the project's success.

Tip 10: Act as if you have the authority. Often times, project managers have very little real authority in terms of reporting structure, or budget, or even being part of the leadership team's decision making process. But, in fact, project managers do have authority. When a person commits to do work for you, when a functional manager commits resources to you, when an executive commits their time and attention to you, you as project manager have authority over all of that. And, you have the right to exercise that authority.

TOP TEN LIST #17: BARRIERS TO PROJECT NEGOTIATIONS

Tip 1: Being confrontational. Project negotiations need not be confrontational. To the contrary, the most effective project negotiations are those negotiations that are characterized by all of the parties involved in the project working together to understand the problem and to find a solution. Be mindful that the attitude that you take in negotiations will set the tone for the interaction. If you are or others perceive you to be confrontational, you might find yourself with a fight on your hands or even alienated from those want to work as a team.

Tip 2: Trying to win at all costs. If you have to "win", then someone else has to lose. That can create hard feelings and more difficulty down the road. Typically, the best perspective in negotiation is to try to find an outcome where both parties "win". This will create an atmosphere of partnership, trust, and willingness to see a problem from more than one perspective. Try not to view negotiation as a contest that must be won. Such victories can often be Pyrrhic.

Tip 3: Blaming the other person. In any conflict or negotiation, each party contributes, for better or worse. If you blame the other person for the project difficulty you are likely to create an angry and confrontational situation. If you take responsibility for the problem at hand, you will create a spirit of cooperation. Seek to apply the appropriate situational leadership style and focus on solving the problem and finding a "win-win" going forward solution, not placing blame.

Tip 4: Not understanding the other person. In order to find a solution that is acceptable to both parties, it helps greatly to understand the other party's needs and wants with respect to the issue. If we don't know what a person needs or wants, and in some degree of priority, then it is impossible to arrive at a negotiated "win-win" result. It will also be very difficult to even negotiate at all. However, when we take the time to find out about the other person, we usually discover that there are no significant, insurmountable, issues or problems that prevent a solution to be reached.

Tip 5: Not preparing for the negotiation. Before entering into a negotiating session, prepare some options that you can suggest if your preferred solution is not acceptable. Also, think through and clearly justify to yourself the items that you are willing to give up and the items that you are not. Anticipate why the other person may resist your suggestion, and be prepared to counter with an understanding and an alternative. Any surprises to you are a clear sign that you were not sufficiently prepared for the negotiation.

Tip 6: Not maintaining composure. It is easy to lose composure when negotiating and it is normal to become emotional during a negotiation that is important, especially when you are not getting what you need or are flat out losing. However, if you lose your composure and get more emotional, you are less likely to negotiate skillfully and much less likely to channel your negotiating behavior in a constructive manner. It is important to maintain control and to remove your personal feelings from the dialog. Remember that when you lose your composure you usually lose the negotiation.

Tip 7: Not negotiating at a good time. There are good times to negotiate and there are bad times to negotiate. Bad times include those situations where there is a high degree of anger on either side, a preoccupation with something else, a high level of stress, or tiredness on one or both sides of the table. Seek to schedule negotiations at a good time and avoid bad times for negotiating altogether. If they arise

during negotiations, take a break or even reschedule to a better, more productive, time. Not negotiating at a good time puts you at a disadvantage and, in itself, can be a barrier to project negotiating.

Tip 8: Not negotiating responsibly. Negotiating is a complex process but one that is well worth mastering. If you keep in mind that by negotiating responsibly you will achieve better results and greater success, you will find the process easier to execute and more enjoyable. Negotiating responsibly will also help you to maintain a personal distance from the frustration and aggravation that can sometimes occur in difficult situations and with difficult people.

Tip 9: Cross the line at least once. If you do not cross the line at least once in your negotiations, then you do not know where the line is. Find an issue and cross the line. You might be surprised to find how much farther away you were from the real line of negotiations.

Tip 10: Take breaks. Negotiating can be tiring and it can become heated and emotional. There is nothing wrong with calling a time out. Take frequent breaks to get through the all items and to give them the attention they deserve. Always take a break if the negotiations become too intense and unproductive or if new information that requires time to consider is introduced into the discussions.

TOP TEN LIST #18: SARBANES-OXLEY SDLC COMPLIANCE

Tip 1: Get everyone educated. Ask your finance team to conduct a meeting with your public company accountants and to have them, the public company accountants, provide insight into IT general controls. In addition, there are multiple materials available on the Internet that specialize in Sarbanes-Oxley section 404 for IT such as the "IT Control Objectives for Sarbanes-Oxley" published and provided by the Information Technology Governance Institute (ITGI). Get everyone educated in Sarbanes-Oxley as early as possible.

Tip 2: Get everyone on the same page. Be sure your team understands how SOX fits into the IT environment. You should make sure the IT group is involved from the beginning of the project and is updated and included in the review of business processes that rely on IT systems and infrastructure as well as the review and validation of the IT development (SDLC) and change management processes that are used to manage new systems development, enhancements, bug fixes, and change requests.

Tip 3: Leverage your existing documentation. Many organizations such as banks, pharmaceuticals and manufacturing companies already have to comply with federal regulations and many are ISO 9000 certified. It is important that IT departments leverage existing procedures, policies, and documentation in their SOX programs. This can save time as well as avoid duplication of effort. Additionally, the existing documentation of processes and controls may even need to be updated or extended upon to satisfy the current state requirements.

Tip 4: Design your SOX program to fit your business needs. Don't change what you do to fit a generic set of best practices. Use best practices as a reference point and for guidance, especially where no or limited documentation of IT processes exist. Your IT SOX 404 program should be tailored to your business requirements, not a costly and lengthy effort that doesn't fit your business needs. Ask your public company accounting firm for references similar in industry and size to your firm to ensure the scope of your SOX 404 program is on target.

Tip 5: Hire advisors that understand IT management and SOX. Many public company accounting firms are experts in accounting, auditing and SOX, but have never managed an IT department. In addition to audit expertise, companies of all sizes require practical front-line IT experience to determine what makes sense for their company. There is a significant amount of translation required to convert accounting practices into terms and actions appropriate for the company that can be identified, implemented, and validated by the IT department.

Tip 6: Work closely with the executive team. Make sure the executive team understands what IT does and how IT fits into the overall program and requirements for compliance. The CIO or manager of IT should be part of the SOX steering committee.

Tip 7: Provide flexibility within structure. Ensure that all business units have and follow standardized procedures for evaluating, documenting and implementing controls. Keep in mind that flexibility within structure will enable processes to not only vary from business to another, but to be optimized by the business at the point of execution. Anticipate the need for flexibility and develop procedures for identifying and describing why some IT controls may vary from unit and unit and have a defined and consistent approach for standardizing controls where it makes sense.

Tip 8: Do not take on too much all at once. Complying with SOX 404 is a daunting and time consuming task for most IT organizations. Prioritize and work on the processes and critical issues that, if not addressed, may lead to your company failing their 404 attestation. Some processes and best practices may have to wait until later.

Tip 9: Monitoring and controlling. Continually review the execution of your program plans with all relevant parties. In addition to the SOX PMO team, be sure to include your public company accounting firm as well as any other outside consultants. Like any other project, use your monitoring and controlling process to identify and communicate project issues and to approve any project change requests such as scope, schedule, and budget.

Tip 10: Maintain flexibility. The interpretation of what is required to meet the spirit and intent of the Sarbanes-Oxley Act is changing and will continue to evolve overtime. Keep focused on what is best to ensure your IT organization is focused on safeguarding company assets, maintaining data integrity, providing the business with the infrastructure it needs in order to attain its business objectives.

TOP TEN LIST #19: GO-TO-MARKET (GTM) PROJECT MANAGEMENT

Tip 1: Improve results with process and measurement. Many organizations struggle to bring products to market relying on hope and prayer. Successful firms employ proven "Go-To-Market" processes with measurable and optimized performance objectives aligned to the product multi-year product pro forma income statement. Ensure that all financial goals can be distinctly assigned and effectively measured and that there is functional linkage and integrity between the financial plan and objectives for the business units contributing to plan attainment.

Tip 2: Define the Market. As part of the market segmentation process, first define the relevant market in terms of customer value delivered, not technology or product features implemented. For example, don't think you are in the "Wrestling" business when you are really in the "Entertainment" business. Customer Value oriented thinking will facilitate value proposition based marketing and feature, advantage, benefit based selling. As part of your market definition, be sure to assess market trends and existing or potential alternatives and substitutions for your products and services.

Tip 3: Market Segmentation. Segment your market based upon market attractiveness as well as the ability of your business to serve the segment. Determine the most attractive market segments for your product or service offering based upon such metrics as market size, growth rate, profitability, and strategic fit with your overall corporate direction. Be sure to also segment and select your market segments based upon the ability of your business to serve the identified segment. An attractive segment that can't be effectively serviced may rank well below less attractive segments that can be more effectively serviced.

Tip 4: Defining Whole Solutions. Determine what customers, in each target market segment, need in order to completely fill their compelling reasons to buy. Identify and prioritize the key needs that are not provided by generic solutions. Define and differentiate the product in terms of its core value, parity with competition and other alternatives, additional value-add, and its future value promise. Constantly assess the marketability of the product in terms of its unique and compelling reasons for its purchase.

Tip 5: Routes to Market. Determine what's needed to sell the whole solution based upon customer buying behavior, market dynamics, and the requirements of the whole solution. Develop a map of alternative resources that best meet each market segment's needs throughout the sales cycle. Assess financial viability of each preferred route and develop programs, incentives, and management controls to ensure results are achieved.

Tip 6: Financial Plan Baseline. Create a baseline financial plan that functionally aligns the business unit objectives and activity targets with the GTM product/service revenue goals. The financial plan is used to guide execution and is the baseline for measurement and control. GTM financial planning is an iterative refinement process that includes negotiation among the business units to ensure the results are achievable. The GTM financial plan provides a clear view of measurable objectives required for success and activity targets required to be achieved in order to attain the performance objectives.

Tip 7: GTM Scorecarding. Use GTM scorecarding to ensure that plan elements are achieved, business unit activity targets and objectives are being met, and that the GTM plan remains functionally aligned to its financial plan. For each business unit involved in the execution of the GTM plan, review activity target quotas and attainments such as lead generation by marketing mix, sales pipeline clothing and conversion,

channel sales enablement and performance, etc., to early identify and correct plan areas not achieving minimal levels of acceptable performance.

Tip 8: Life Cycle Optimization. Periodically assess and optimize the product GTM plan to its life cycle. Products and services follow predictable life cycles such as the technology adoption life cycle. Strategies well suited for one life cycle phase such as "early adopter" may be not as well suited for another phase such as "early majority". GTM plan life cycle optimization enables identification and investment in the most effective mix of marketing resources and activities.

Tip 9: Periodically test GTM metrics. GTM projects require a great deal of analysis and assessment of findings. A number of metrics are used to build actionable goals and objectives for which the GTM strategies are developed to achieve. Increased levels of capabilities and maturity which positive impact metrics and increased competition and weak market conditions which negatively impact metrics need to be periodically reviewed and refined in our to optimize the investments of the GTM plan.

Tip 10: Be aware of early warning signals. The primary purpose of GTM projects is to successfully serve target market segments by developing products that meet customer needs and that can be brought to market and purchased by the customer in the most cost effective manner. The very assumptions and metrics that are required to build and model the Go-To-Market for the product are tremendously helpful in obtaining early insights into product's success. Well before monthly or quarterly sales results are achieved, GTM measurements of plan components can provide specific insights into segments not meeting plan as well as segments exceeding expectations.

TOP TEN LIST #20: SALES PROCESS

Tip 1: Think in terms of the customer Purchase Cycle. Most sales professionals follow a sales cycle process to ensure that they have the best possible chance of selling their product offering to the prospect. Such a process has steps for lead generation, pre-sales, sales, installation, and service, etc. Savvy sales pros, however, always think in terms of the customer purchase cycle (information, evaluation, purchase, delivery, support) and carefully think about and plan for all of the things required, from the customer's point of view, to advance the initiative and enable a purchase.

Tip 2: Know both target markets; the most attractive and the least attractive. Target marketing is critical to the success of just about any sales and marketing "Go-to-Market" project. In addition to identifying and understanding your most desirable target market, take time to identify and understand your least desirable target market. Ensure your sales teams understand and focus their efforts on the best opportunities in your most attractive market segments as well as be aware of the market segments that they should avoid and refrain from investing, and likely squandering, their time and resources.

Tip 3: Conduct Informal Sales Reviews. When one of your sales representatives loses a sales opportunity, conduct an informal review of what took place. The purpose of the review isn't to place blame, although that may very well happen, rather to identify the reasons for the lost sale, to determine what could have been done differently, and to assess if there are any sales process defects, sale rep execution problems, or competitive exposures. When conducted properly, informal reviews can be an invaluable source of information that can both help to prevent further competitive losses and ensure that the sales team executes effectively.

Tip 4: Qualified Lead Definition. Ensure your sales teams know what a qualified lead is. Some sales organizations have elaborate schemes for grading and ranking leads and determining if they are qualified. While such schemes can be helpful, it is often best to view leads as either qualified or non-qualified. To be a qualified lead, the following four conditions must be met: one, there is a mutually agreed to customer need that your product meets; two, there is a budget or access to budget funding of the purchase; three, there is a timeframe for the purchase; and four, there is an identified decision maker for the purchase. If any of these four conditions are not met, the lead cannot be considered qualified.

Tip 5: Don't rush to the demo. Often times, sales reps rush a prospect into a demonstration before fully understanding the prospect's needs and/or timeframe for even further consideration. Not only does this put off and potential irritate the prospect, but it also makes for very poor demonstration results. Seek to first understand the needs and timeframes of the prospect and then, if qualified, pursue forward going discussions and demonstrations.

Tip 6: Plan for multiple, on-target, demonstrations. Often times, product support reps give lengthy canned demonstrations that are too long and detailed for the executives in the audience or are not targeted to specific areas of interest and requirements that the technical team and users want to see. Seek to ensure that multiple, on-target, demonstrations are held to best meet the schedule availability and areas of interest of all those that need to be involved. Multiple, on-target, demonstrations may appear to take more time, but in reality they better meet the "purchase cycle" needs of the customer as well as shorten the "sales cycle" timeframe for the vendor.

Tip 7: Go further with your demos using the FAR technique. If your company is like most, chances are your sales engineer, though well trained technically, has likely never had any kind of training on how to give effective customer-oriented demonstrations. For each key need that serves to justify your proposal, ensure your sales engineer demonstrates your product using the Feature-Advantage-Reaction, FAR,

technique. For each key requirement, demonstrate the feature of your proposed solution that addresses that requirement, state the quantifiable advantage achieved by your functionality in terms of money or time or both, and then ask the customer decision maker for their reaction in terms of agreement to the benefit and providing their assessment of measurable value. By the end of the demo, customer agreed to quantifiable benefits for each key area of requirement will have been validated and can be effectively used in the subsequent proposal and sales process steps.

Tip 8: Personalize your proposals. Some vendor proposals are mostly boilerplate information with little, if any, customer specific input and analysis information. Use the customer feedback provided throughout the pre-proposal activities to personalize your proposal in terms of both benefits that justify the investment and endorsements by those that stand to benefit in the customer organization and will support and attest to the benefits that they will receive on account of your solution.

Tip 9: Use customer references effectively. When providing customer references to a sales prospect, ensure the following three conditions are met. First, the prospect is qualified and all issues and requirements needed to make a purchase decision have been satisfied. Second, the customer reference is similar in terms of the business use case for the solution offering, and ideally industry and size of company, as the qualified prospect. And third, ensure the customer reference contact is of the same "buyer-type" of the qualified prospect. If the customer prospect seeking to speak with a customer reference is an economic buyer, for example, then put that prospect in contact with their economic buyer peer of the customer reference. Let peers talk to peers. Otherwise, you can easily end up with a mismatch of buyer types having an apples and oranges discussion.

Tip 10: Conduct formal reviews of major losses. Many sales organizations review losses to determine what went wrong, why the sale was lost, and what could have been done differently. Too often, however, these reviews are limited to inform management on the details of what happened and tend to summarily brush off sensitive issues with little interest in identifying problems, recommending corrective action, and determining if any error or negligence was committed. It is much easier to say that the loss was on account of pricing or product problems. Formal loss reviews, especially for significant losses, are a valuable way to address sales process problems, individual performance issues, and to benchmark the competition.