PCW07
Maximizing the Ajera Project
Management Tools for YOUR Firm

November 14, 2016
Valerie Higgins

Agenda

9:00 AM - 10:30 AM

- Introductions
- Top 10 Things that Effective Project Managers Do
- Business Development
- Project Budgeting Methods and Techniques

10:30 AM Break - 10 Minutes

10:40 AM – 12:00 PM

- Resource Allocation & Schedule Manager
- Project Maintenance
- Project Closeout
- Dashboards & Widgets

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Project Budgeting Methods &Techniques

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Project Budgeting Methods and Techniques

Estimating is the process of forecasting or approximating the time and cost of completing project deliverables.

What is Bottom-Up Budgeting?

Bottom-up budgeting: detailed estimates of work packages made by those who are most familiar with the task. Each task is budgeted with resources building the overall contract for the project.
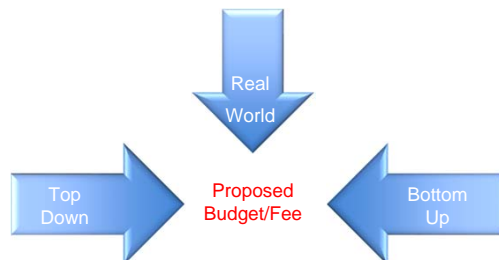
Accuracy: -10% to +30%

Bottom Up

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What is Top-Down Budgeting?

Top-down budgeting: usually are derived from someone who uses experience and/or information to determine the project duration and total cost. An example would be taking the overall construction cost and estimating your fee as a percentage of that cost. $1,000,000 construction cost, fee is 8% or $80,000. The estimated fee is pushed down to phases by pre-determined %.

Top Down

Accuracy: -20% to +60%

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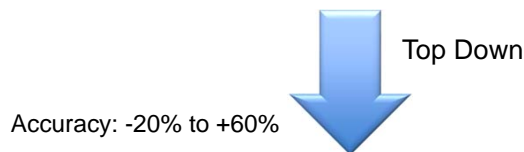
Effective Budgeting Requires Multiple Methods

Real World

Top Down → Proposed Budget/Fee ← Bottom Up

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Considerations for choosing a budgeting method

Condition	Bottom-Up Estimates	Top-Down Estimates
Strategic decision making		X
Cost and time importance	X	
High uncertainty		X
Internal, small project		X
Fixed-price contract	X	
Customer wants details	X	
Unstable scope		X

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Business Development Demonstration

➤ Add a BD Opportunity

➤ Budget a BD Opportunity

➤ Define the Baseline in a BD Opportunity

➤ BD Reporting

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Hands On
Setup BD Tools & BD Opportunity

Review/Build BD Stages

Review/Build BD Final Disposition Reasons

Build a Business Development Opportunity

- ✓ Build a Business Development Opportunity using your template
- ✓ Include resources, hours, dates BY PHASE – Build the Baseline
- ✓ Review Business Development Dashboard with Instructor
- ✓ Review Project Workload report with Instructor
- ✓ Review Employee Workload report with Instructor

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10 minute break

Up next….at 10:40

Winning the Work
Resource Allocation
Schedule Manager

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Resource Assignment & Schedule Manager

Winning the Work:

- ✓ Simple steps to transition from Opportunity to Active
- ✓ Triggers Win/Loss reporting for trending & opportunity to improve BD processes

Resource Assignment Provides:

- ✓ Ability to report budget vs actual to project teams
- ✓ Ability to assign tasks & receive completion feedback from project team
- ✓ Ability to review man hours by employee type for staffing assessment
- ✓ Transfers ownership for scope/budget to team members
- ✓ Sets up the Schedule Manager for easy use & reporting

Schedule Manager:

- ✓ Ability to report schedule & budgeted hours to project teams
- ✓ Ability to review team workload and adjust as necessary
- ✓ Ability to share project schedule to clients when required

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Resource Assignment & Schedule Manager Demonstration

- ➢ Winning the Work
- ➢ Resource Assignment
- ➢ Schedule Manager
- ➢ Time Entry

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Hands On

Win Work, Resource, Schedule, & Add Time

Win Your Project

- ✓ Assign a project number
- ✓ Update the BD records to transition from Opportunity
  - • Complete the BD stage that is In Progress
  - • Assign a Final Disposition Status & Reason
  - • Review project info and make changes where necessary

Resource Assignments

- ✓ Add resources in the Manage Tab (do not assign all phases)
- ✓ Add a consultant in the Manage Tab

Schedule Manager

- ✓ Add resources to remaining phases via Schedule Manager
- ✓ Schedule employee hours on your project

Time Entry

- ✓ Add hours to your project
- ✓ Review budget to actual and schedule to actual hours on your project

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Project Maintenance
&
Project Closeout

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Project Maintenance & Project Closeout

Maintaining Projects Regularly:

- ✓ Results in real time and accurate data that your team can rely on
- ✓ Engages Project Managers to be accountable for their project budgets & timelines
- ✓ Provides up to date and accurate information to share with clients

Project Closeout Process:

- ✓ Provides an opportunity to engage in a Lessons Learned meeting
- ✓ Provides an opportunity to record important data for future use
- ✓ Results in a clean database
- ✓ Results in more relevant and quick reporting
- ✓ Process should be developed from team collaboration
  - ✓ Accounting
  - ✓ Technical Teams
  - ✓ Project Management
  - ✓ Business Development

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Best Practices for Project Managers

Ajera Project Maintenance

Daily

1. Input time daily
2. Review Project summary widget

Weekly

1. Project maintenance – dates, status, & budgets
2. Weekly PM time review

Bi-Weekly

1. Update Reported Percent Complete
2. Update Business Development Opportunities; notes & % Chance of Winning
3. Aging reports – WIP & Client Invoice Aging
4. Collection calls *Be clear on the payment requirements for your client before calling.*

- ➤ *Ask for help if the time is not available.*
- ➤ *Create a schedule specific to your company's requirements and PUBLISH it.*
- ➤ *You cannot hold your team accountable if requirements are not in writing.*

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Project Maintenance Demonstration

Project Maintenance

➢ Update phase status
➢ Update Reported Percent Complete (RPC)
➢ Update dates & input Actual Completion Date
➢ Add project notes
➢ Review AR & WIP Balances on Project Managers Dashboard

Business Development Maintenance

➢ Update % Chance of Winning
➢ Update BD Stage, Notes, Due Date

Time Review

➢ Review timesheet approval process
➢ Review Daily Time Entry widget

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Hands On Update your Project Maintenance

Update your Project

✓ Update a phase (or two) status to shut it down from time entry
✓ Open a timesheet and confirm the completed phases are not active
✓ Update the Reported % Complete on a Phase (or two)
✓ Update the Reported % Complete on the Project
✓ Update the Actual Completion Date on Phase(s) put on Work Hold
✓ Update dates on Phase(s)
✓ Add project notes

Review the AR and WIP Balances on your Projects

✓ Review the AR and WIP balances on the Project Manager dashboard

Update you Business Development Opportunities

✓ Review the process of updating the % Chance of Winning
✓ Review the process of updating BD Stages/Notes/Due Dates

Time Review
✓ Review the process to approve time on your projects
✓ Review the Daily Time Entry widget

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Dashboards
&
Widgets

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Dashboards & Widgets

Dashboards & Widgets:

- ✓ Information at your fingertips in real time
- ✓ Easily customizable for YOUR firm's requirements & KPIs
- ✓ Widgets should be organized onto dashboards by role & purpose
  - ✓ Principals
  - ✓ Accounting
  - ✓ Project Managers
  - ✓ Division/Department Managers
  - ✓ Employees
- ✓ Dashboards & widgets should not be stored outside of Ajera

Dashboard Security:

- ✓ Dashboard security s/b assigned by Role rather than Employee whenever possible
- ✓ Drilldown or child dashboards will not be available to employees until security is set at all levels

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Dashboard & Widget Tour

➢ Instructor will provide a tour and explanation of the BONUS dashboards provided as part of this class.

➢ These dashboards are available for download in the Kona space you were invited to prior to the class.

➢ If you have not joined the Kona space please see the instructor during a break.

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Let's Review!

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Project Templates

- ✓ Solid Foundation for consistency & accuracy
- ✓ Should do 80-90% of the work for a Project Manager
- ✓ Project Managers shouldn't build templates but they MUST have input

Business Development

- ✓ Provide pipeline tracking & revenue projections
- ✓ Gives transparency into tracking tasks to win work
- ✓ Provide reporting for future workload/hours projections
- ✓ Provides win/loss trending reporting

Resourcing & Scheduling

- ✓ Ability to report budget vs actual to project teams
- ✓ Ability to assign tasks & receive completion feedback from project team
- ✓ Ability to review man hours by employee type for staffing assessment
- ✓ Transfers ownership for scope/budget to team members

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Project Maintenance

- ✓ Results in real time and accurate data that your team can rely on
- ✓ Engages Project Managers to be accountable for their project budgets & schedules
- ✓ Provides up to date and accurate information to share with clients

Project Closeout

- ✓ Provides a clean database & quicker reporting
- ✓ Opportunity to review results in comparison to baseline
- ✓ Record Lessons Learned & historical data for future Business Development efforts

Paperless Billing Review

- ✓ Expedites billing process by electronically routing through the office
- ✓ Transparency into the billing cycle – you can see where all invoices are at any time
- ✓ Allows for Principals and PMs to work on billing outside of the office
- ✓ Allows for easy collaboration for multi discipline invoicing
- ✓ Creates billing review history

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Security Roles

- ✓ Safe and effective collaboration between Project Managers & Accounting
- ✓ Allows for different levels of access based on employee role
- ✓ Allow employees access required to do their job without compromising confidential (payroll) information

Custom Fields

- ✓ Track information pertinent to YOUR firm
- ✓ Easily report on information stored in custom fields
- ✓ Custom fields are available on all primary records in Ajera

Dashboards & Widgets

- ✓ Information at your fingertips based on user requirements & KPIs
- ✓ Easily customizable
- ✓ Dashboards should be relevant and organized
- ✓ Widgets can be organized onto dashboards by role & purpose

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Questions?

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Additional
Training Options

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Custom PM Adoption Boot Camps

Our PM Adoption Consultants guide you through

- ✓ Template setup
- ✓ Security setup
- ✓ Dashboard modification & security
- ✓ Everything taught in the 2 Day workshop customized for YOUR team

Onsite or remote Boot Camps taught on your data

Take your Project Managers to the next level!

Always here to help with your Project Management Adoption training.
Contact our PM Adoption sales team for more info.

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Project Management Workshops

We will be in 20 cities across the US & Canada this year!!

February 10-11: Charlotte, NC	July 6-7: San Francisco, CA
February 24-25: Phoenix, AZ	July 20-21: Chicago, IL
March 2-3: Salt Lake City, UT	August 10-11: Denver, CO
March 16-17: Boston, MA	August 24-25: Las Vegas, NV
April 6-7: Austin, TX	September 7-8: Seattle, WA
April 13-14: Herndon, VA	September 21-22: Nashville, TN
May 11-12: Toronto, CA	October 5-6: New York, NY
May 18-19: Indianapolis, IN	October 19-20: San Diego, CA
June 8-9: Atlanta, GA	November 9-10: Houston, TX
June 22-23: Minneapolis, MN	December 7-8: Orlando, FL

Always here to help with your Project Management Adoption training.
Contact our PM Adoption sales team for more info.

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New in 2016
Ajera Financial Management Workshops

By popular demand we are introducing a new workshop, "**The Ajera Financial Management Workshop**". This workshop is intended for CFOs, Controllers, Accounting managers, Principals, Owners, and those involved in new hire training and organizational restructuring.

✓   Gain a better understanding of Ajera's financial/accounting workflow & reporting

✓   Learn about tracking key KPIs and how to benchmark your firm against the industry standards

✓   Improve the accuracy of your firm's financial reporting

✓   Can be customized for your firm and taught remotely or in an onsite Boot Camp

2017 City Schedule to be released soon!

Contact our sales team for more info.

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New in 2016
Ajera Widget Design Workshop

The Widget & Reporting Workshop is perfect for principals, project managers, administrative and accounting team members who want to further develop their skills in building dashboards and widgets.

All attendees will benefit from this two-day, hands-on workshop that integrates operational and industry best practices with key processes and designs for fully leveraging the dashboard and reporting capabilities in Ajera. Our dashboard and reporting consultants will guide you through the most effective use of Ajera for reporting, focusing primarily on creating dashboards and widgets, but also including how to develop inquiries. We will take you through a full reporting cycle that focuses on the best measurements and how to design the right dashboards/widgets to optimize your reporting effectiveness. Attendees will leave with reporting support tools from the workshop including slide deck, dashboard/widgets, and more in order to maximize your dashboard and reporting capabilities.

December 8-9, 2016 Austin, TX

2017 City Schedule to be released soon!

Contact our sales team for more info.

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Thank You!

Always here to help with your Project Management Adoption training. Custom onsite and remote packages available. Contact our PM Adoption sales team for more info.

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