

Introducing the Planview Project Portfolio Management Professional (PPM Pro) to your organization

Create a buzz about the new application by sending emails, creating posters, etc.

Review the organization's **current** capabilities, tools, and future in project and portfolio management.

- View videos of the Project and Portfolio Management (PPM Pro) tool and its benefits.

Outline the benefits:

- PPM Pro projects and portfolio management deliver more efficient value to the organization and its clients.
- The teams' participation will help ensure PPM Pro meets their needs and, with proper planning, does not cause too much intrusion in their daily work schedules.

Next Steps

Identify all resources needing access to the tool and its features.

- Project Managers (Full Users)
- High-Level Stakeholders
- Resource Managers (Full Users)
- Timesheet Users
- Request Users (All resources in the organization are added and have access to request projects and other services via PPM Pro)

Set expectations for using the PPM Pro.

- Foster a few stakeholders to participate in some or all testing.
- Keep the testing simple and include usage instructions.
- Plan the time of testing so as not to interrupt ongoing work.
- Ensure team members understand how the tool fits/changes their current processes.

Communications

- Identify and ensure all required Key Stakeholders will participate in PPM Pro activities.
- Plan and communicate via corporate-wide notifications, meetings, emails, and texting.
- Communicate to the stakeholders' expectations and guidelines on using the tool.
- Communicate the PPM Pro changes or testing that may occur in production.
- Review the application configuration and work with the team to approve any upgrades or improvements.
- Hold regular review meetings with the PPM team and identify Stakeholders as needed.
- Follow-up on communications and surveys.

Review Accomplishments

- Hold review meetings regularly.
- Discuss and document changes as required or needed.

PPM Pro Admin Support

- The PPM Pro Administrator provides guidance and support during the implementation process and application integrations and is available to answer questions and troubleshoot any tools setup and operation issues.
- Regularly check in with team members to see how the PPM Pro tool works for them and address any concerns or problems.

Train the Trainers

- As you build out each PPM Pro entity, identify training needs of resources for the management of:
 - Projects and Portfolios
 - Reports and Dashboards
 - Assets
 - Resources
 - Requests
 - Permissions Profiles
- Plan Training sessions to cover the features and functionality and updates to your current process aligned to the PPM Pro.
- The trainer provides videos of training sessions and quick reference guides as needed.