

## **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.