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Common Myths About Microsoft Project Online & Project Server

Are these misconceptions limiting the value of your Microsoft PPM solution?

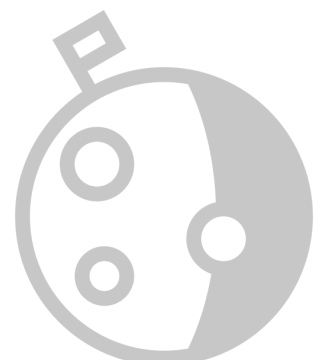


The earth is **flat**.

The moon is made out of **cheese**.

Elvis is still **alive**.

Myths have been with us since the dawn of civilization. Some myths play on our emotions. Others are downright scary. But the common thread to all myths – from those based on the natural world to modern myths about technology – is that they typically spring from an attempt to explain things in the absence of actual data.



Thousands of organizations use Microsoft Project Online and Project Server (Project Online/Server) for project and portfolio management (PPM). Yet many of these organizations barely scratch the surface in utilizing all of Microsoft's powerful PPM capabilities. As a result of not being exposed to – or even aware of – a wide variety of features and capabilities, certain myths have sprouted up among PPM professionals regarding Microsoft's perceived lack of PPM capabilities.

Microsoft's in-the-Cloud Project Online and on-premises Project Server are truly comprehensive PPM platforms. But false perceptions continue to persist that they lack key PPM features. Some of these misconceptions are based on ignorance, some are based on negative experiences with earlier versions of the solution and many are propagated by other providers of PPM solutions. And these negative perceptions are further bolstered by poor implementations that simply ignore or under-utilize capabilities that are included in Microsoft's Project Online and their 2010 & 2013 releases of Project Server. As a result, myths about Microsoft's PPM capabilities – myths that are no more real than Bigfoot or Loch Ness Monster – continue to persist.

Some are listed here, with explanations about their genesis, clear evidence that debunks each one, plus additional insight that illustrates how these perceived weaknesses are in fact major strengths of the Microsoft PPM platform.



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Myth #1:

Every project must start with a schedule

This myth probably has its roots in the fact that Microsoft Project started life as a desktop scheduling tool, which eventually grew into the world's most recognized scheduling software. Entire generations of project management professionals were brought up on the notion that to start a project, one must first create the schedule. With the advent of the Internet, Microsoft created what was essentially a web-based repository to consolidate and socialize the schedules that were created on the desktop. This eventually became the solution now known as Project Server. But even though Microsoft has since built out sophisticated capabilities in Project Online/Server, the notion that one must start with a robust schedule to derive value from Project Online/Server still persists.

Fast forward to today's versions of Project Online/Server. These solutions recognize that not all organizations, departments and people manage projects in the same way, while acknowledging that detailed schedules may only be required at a certain point in the project lifecycle. Yet for many, the myth that these solutions are still all about scheduling lives on to this day.

The fact is, many organizations today actually deploy Project Online/Server not from the bottom-up, but from the top down. This means that they first establish overarching governance processes to control a wide variety of projects from cradle to grave. This includes automating the demand management process by consolidating requests and building business cases to evaluate competing projects. These business cases can include descriptive data, resource requirements (decoupled from the schedule in a resource plan) and strategic impact assessments – all without requiring the creation of a project schedule.

This top down approach to deploying Project Online/Server often results in quick wins and helps gain executive buy-in for future phases of PPM deployment. Having established this top down foundation, the PMO can then begin to deploy bottom up PPM capabilities – like schedule management and time reporting – across the organization.

Indeed, Project Online/Server is flexible enough to provide project managers across the maturity spectrum – from novice to part-time to professional – with the tools they need to manage their projects the way they want to. Novices can manage lightweight projects in SharePoint sites synchronized with Project Online/Server. Part-time PMs can leverage easy-to-use web-based scheduling capabilities within Project Online/Server, and experienced project managers can continue to take advantage of all the powerful capabilities included in Project Professional.



Myth #2:

Project Online/Server lacks project and portfolio governance capabilities

It stands to reason that people who believe that Project Online/Server is only about schedule and resource management also believe that it lacks the governance workflow controls to truly manage a project from cradle to grave. But since its 2010 release, Project Online/Server now includes a workflow foundation designed to control projects throughout their lifecycle.

While the 2010 version's workflow capabilities/foundation are quite powerful, some administrators and PMO teams remain frustrated that they still require a developer to integrate the appropriate business rules and controls at each workflow stage. That frustration grows if they must continue to be dependent on the same developer if changes or updates to the workflow are needed.

But in 2013, the governance capabilities in Project Online/Server became truly world class. PMOs can now leverage SharePoint Designer to build, maintain and publish workflows to control a wide variety of project types across their lifecycle. Some examples of these workflow controls include:

- Displaying which specific data is required to be completed at a given Stage
- Validating that the appropriate data has been collected for each Stage
- Generating and managing simple and/or complex approval notifications
- The ability to move projects between nested workflows (e.g. based on \$ thresholds etc.)
- The ability to determine what happens when a project is selected or not selected in a portfolio analysis

The solution also includes a comprehensive audit history to track the project through all approval stages. Clearly, any notion that current versions of Microsoft's PPM solutions lack project and portfolio governance capabilities is based on outdated perceptions.



Myth #3:

Project Online/Server lacks true Portfolio Management and Analysis Capabilities

Again, the widely-held yet misguided perception that Project Online/Server can only operate as a bottom-up PPM tool fuels this particular myth. This most likely stems from the fact that many years ago, Project Server did indeed lack some of the top-down portfolio management capabilities already provided by best-in-class portfolio management systems – including prioritization, optimization and capacity planning. But that distinction became non-existent after Microsoft acquired the UMT Portfolio Manager solution in 2006 (rebranded as Office Project Portfolio Server 2007).

The acquired capabilities – including demand management, what-if portfolio analysis and capacity planning – are now integrated into Project Online/Server. With these acquired and integrated portfolio management capabilities, today's Project Online/Server now includes a Portfolio Strategy module that enables the PMO to:

- Define a set of actionable, measurable and unique business drivers
- Utilize pairwise comparison techniques to engage executives to objectively prioritize the business drivers for the upcoming planning period
- Undertake an impact assessment of each project against the prioritized business drivers to derive a strategic value score for each project
- Run cost constraint what-if analyses to optimize the project portfolio under varying budgetary constraints
- Run capacity planning analysis to maximize resource utilization

So the latest versions of Project Online/Server now deliver a PPM system that includes world-class top-down portfolio analysis techniques fully integrated with leading execution-orientated schedule management and resource management capabilities. And it's made all the more powerful because it's all built on-top of SharePoint, the world's most used collaboration platform.



Myth #4:

Project Online/Server is difficult to configure

Like most Microsoft products, Project Online/Server are very easy to configure. This enables the PMO and system administrators to easily configure the solution to align with varying best practice methodologies. The myth that Microsoft's PPM solutions are difficult to configure stems from misinformation and one-sided comparisons typically conducted by vendors of competing PPM solutions. These providers invest a lot in slick demos with pre-packaged dashboards and reports which feed the perception that Project Online/Server lacks pre-configured best-practices based on a variety of PPM scenarios.

These demos are quite compelling, but what the vendor neglects to mention during the demo is that they are typically hard-wired to simply showcase a specific configuration. But when it comes time for a customer to modify the functionality they saw in the demo to meet their specific needs, they are hit with the reality that doing so will require an investment in customization.

Project Online/Server on the other hand can be quickly configured to meet varying methodologies and vertical scenarios. Because no two organizations are alike, the solution makes no assumptions as to how the software should be configured out-of-the-box. But it's relatively easy for an effective configuration of Project Online/Server to be achieved in a short amount of time.

Of course there are instances in which implementations have not gone smoothly. Regardless of which PPM tool is used, any software configuration and implementation is certain to fail if the organization does not first have a clearly articulated plan of what the desired process actually looks like. Investing the time upfront to define and socialize the appropriate PPM processes increases the likelihood that the implementation will be a success. And of course, having a solution that can be easily configured (not customized) to support those processes is key.

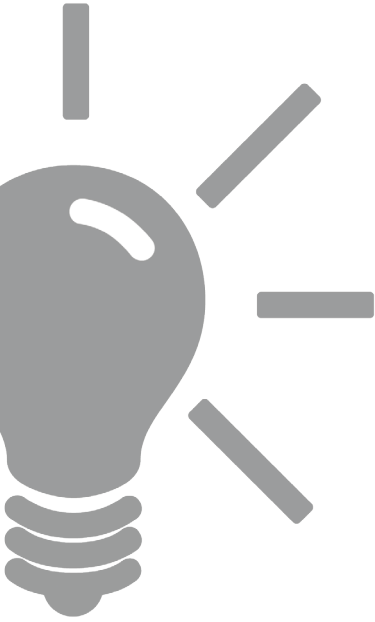
Employing a third-party partner is a common way some companies try to ensure a smoother implementation. But this can also be a source of frustration, especially if the partner resources are not able to define the right phased-implementation approach for a company based on their specific pains (i.e. when to start top down vs. bottom up). Experience in organizational change management is as critical as PPM process knowledge when rolling out a PPM solution across the enterprise.

Fortunately for organizations using Project Online/Server, There are over 500 Microsoft certified and competent PPM partners across the world. These partners specialize in helping to drive successful deployments. Many of these partners even provide packaged templates to fast track deployments.



Myth #5:

Customizations are the answer to everything



One of the things that some organizations – and most technology consulting firms – like about the Microsoft platform is how it allows them to customize the solution to meet unique requirements or integrate line of business systems. While this can be a great advantage to organizations with the right expertise and discipline, it can also encourage the implementation partner or customer to simply move forward with potentially expensive customizations without first assessing whether there is a more cost-effective off-the-shelf product designed to solve the issue.

For instance, organizations looking to incorporate financial data into their PPM processes often rely on excel, reporting solutions and custom integration with ERP systems to integrate cost and benefit data across the PPM lifecycle. While it certainly enables them to expand capabilities beyond what was possible with the standard implementation of Project Online/Server, organizations would be wise to take everything into consideration before taking this approach, as there is a cost to customization, both in resources and in time.

It's not uncommon for the entire roll-out to be held up by the implementation of just one customization. And implementing customizations often requires costly consulting and can tie up valuable internal resources. Plus, the long term costs of sustaining and maintaining customizations can add an additional drain on time and resources. Finally, since the initial requirements – even in the most optimistic scenarios – are rarely met, the need for ongoing support of a particular customization could add unnecessary risk by shackling the organization into a never ending commitment.

Clearly, customizations, while sometimes necessary, are typically not a best practice. Fortunately, Project Online/Server supports a rich eco-system of partners and solutions that both enhance native capabilities and also extend the value of the Microsoft PPM platform with net-new functionality that is seamlessly integrated into the user experience. Adopting solutions that are built specifically to complement Project Online/Server capabilities and leverage Microsoft's powerful platform is generally a much smarter investment. Typically quicker to deploy while introducing significantly less risk, these ready-to-deploy solutions require less internal resources to support, often costing significantly less in the long run.

Myth #6:

Project Online/Server provides little-to-no reporting



Similar to Myth #4, this myth has its origins in the perception-gap generated by slick demos produced by other PPM solution providers. The canned dashboards and flashy reports displayed by some providers during the sales process create the illusion that those solutions can easily support any reporting requirement. But in fact, when those solutions are configured to conform to a specific organization's actual governance requirements, the reporting functionality that was originally demonstrated is either rendered virtually useless, or in the best case scenario, requires significant customizations that impact deployment timelines.

In comparison, and for a variety of reasons, reporting is actually a significant strength for Project Online/Server. First and foremost, Project Online/Server is built on SharePoint and therefore utilizes all of the Microsoft Business Intelligence stack, which is recognized as a leader in Gartner Business Intelligence Magic Quadrant. Microsoft BI includes SQL Reporting Services, Excel Services, PowerBI and more, all which help ensure that PMOs can leverage familiar and easy-to-use tools to create reports on-the-fly with data they have access to. Many users of earlier versions of Project Server may not be aware of the tremendous progress that Microsoft has made in this area.

Microsoft Project Server also provides standardized/pre-built reports that are essentially views that come right out-of-the-box and are consumed as is. Some common examples include Project List Views, Project Timelines, Assignment Work by Resource or Project, and Resource Availability. And additional pre-built reports can also be added through third-party providers, which enable the organization to tailor their static reporting capabilities to meet their specific needs.

An added bonus of Microsoft's PPM reporting capabilities comes from the fact that the partner ecosystem has built out common reports and dashboards (based on varying scenarios) leveraging the Microsoft BI suite. This means that customers can quickly take advantage of pre-packaged best practice reports. Organizations can tap into this vibrant partner ecosystem to extend the value of their platform investment with reporting, analytics and BI solutions that compliment and extend Project Online/Server core capabilities. Even if your company is using another BI platform, it is still quite easy to access the Project Online/Server PPM data and build dashboards.

Don't let mythology impact your reality

Centuries ago, the myth that the Earth was flat kept some ancient mariners from venturing too far from known waters. Their fear of falling off the edge of the world was enough to overcome their need to find better routes or new lands. Of course, some sailors came to understand the concept that we actually do live on a globe long before the rest of the world caught up. Perhaps they actively kept the flat-earth myth alive so that they could explore the world undisturbed by their less-informed colleagues.

Today's myths about technology are no different. Most are relatively easy to dispel, but as long as enough people believe and repeat them, they have a tendency to become part of the popular lore. Those that actively challenge these myths are frequently rewarded with valuable insight that could spell the difference between accepting the status quo and breaking out of the pack. And while some myths like Nessie are endearing and continue to live on in our imaginations, others deserve to be relegated to history. Hopefully, the myths about Microsoft Project Online and Project Server can now be laid to rest, and we can get on with more serious business. Like finding Bigfoot!

