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Re-Thinking IT Project Management: A Different Way of Managing Processes, Projects, Schedules, Resources and Costs



Project Remedies: Bringing Process, People and Tools
Together to Help You Transform Your Organization

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**Want to Change the Culture? Improve Processes? Implement Discipline?
Re-Thinking IT Project Management.**

I. Premise.

Is there anything we do in an Information Technology organization that is done uniquely? Can you think of anything? Neither can I.

Then why are we managing projects as unique one-offs? Why are Project Management Offices (PMOs) using applications like MS Project or PlanView to develop unique project plans? Users complain that these applications are too difficult to use and too manually intensive, and they are. If senior leadership wants to implement and optimize processes, PMOs should be focused on processes and the continual transformation of processes, educating people on project management methodologies, and reporting. Since nothing done is done uniquely, their time spent on managing individual projects would be better spent on defining, operationalizing and managing processes, which are managed as projects. This is how you get to an organization focused on continuous improvement.

Our premise is:

1. If you make project management easy enough and fast enough to use by everyone, project management techniques could and should be used throughout your Information Technology organization. It's not only for large, costly projects, but for all projects; Development and Operations projects, and projects which cross organizational boundaries.
2. Managing individual projects does not transform the organization. The time spent defining common repeatable approval and work processes, using these processes to manage projects through the project life-cycle and capturing performance metrics will transform the organization.
3. Scope, processes, project schedules, resources and cost are all connected. Management needs to be able to compare actual to baseline, for both schedule and cost. Earned Value Management techniques should be the basis of your system but made easy because IT projects are much smaller than the very large projects for which EVM techniques were originally developed.
4. Project plans should include no more than roughly 50 tasks. Any more than that, and they are too cumbersome to use. Project plans with 500 or 1,000 tasks or more are overwhelming, are too difficult for management to quickly look at and understand, to know if the project is in good shape or not.
5. Each person needs to understand how what they do, their task, fits into the overall process, and if they do not finish on time, how it impacts the end-date and the goals of the organization.
6. There are enormous benefits to this approach including capturing total cost of ownership of each service request and each asset, improving customer service, improving resource utilization, improving efficiency, improving transparency, eliminating silos, speeding up tempo and lowering cost, changing the culture and implementing discipline. Leadership's priorities will have more focus and be completed faster. The rest of the company or agency will have more confidence in Information Technology's abilities and management.



II. Measure What You Manage.

Measure what you manage. It is what we have all been taught, and it's correct. How are you managing Processes? Projects? Resource performance? Cost?

One thing we know is: if projects are not managed, they don't finish. Another thing we know is: things have to be accomplished; stuff has to get done. Which comes back to: measure what you manage.

A. Nothing We Do in IT is Done Uniquely.

The way we do things in IT is not unique. Whether we are developing new functionality in a software application, putting new software into production, putting a new server into production, managing a facility move or adding a new employee, we do it or should be doing it the same way every time, and such services should be drawn from a Service Catalog.

In the US Government Accountability Office report dated July 14, 2016 on the Department of Defense's Joint Information Environment (JIE), they describe the "Joint Regional Service Stacks (JRSS) project to replace about 1,000 legacy network security stacks with 48 standardized stacks at 25 locations around the world." "Standardized" is the key word. The report says the scope should be connected to the project schedule, to the resources needed and used, and the cost. Since this was not done, management could not compare actual with baseline, limiting their visibility when making decisions.

Similarly, the NIST Special Publication 800-61 Revision 2, Computer Security Incident Handling Guide, says "Incidents can occur in countless ways, so it is infeasible to develop step-by-step instructions for handling every incident." It goes on to describe ways that incidents can be categorized and recommends documenting each remediation process. We agree. While our enemies can attack us in an infinite number of ways, we can only respond in a finite number of ways. Those processes should be defined, put into production, and practiced. Planning, practicing and measuring is the key to cyber remediation, and everything else we do.

If IT is all about standardized, repeatable processes, processes are all about capturing performance metrics. How else will you know if the new process is better than the old process? Or if one team is performing better than another team? If we are getting better at it? This information can be used with customers to show how improvements have been made.

B. Defining Processes and Training People are Not Enough.

Years ago, a manager at a large utility company in Florida told me about his last year and a half. He said: "The Company hired a major consulting company to define all their IT processes. Once they had them defined, they made copies in 3-ring binders and brought everyone in to train them on the processes. As they were leaving the training, all of the people said "Yes Sir and Yes Ma'am. This is exactly what we are going to do." And as we watched them leave, we realized that we had no idea what they were going to do. We had no idea if they would even remember the processes by the following Monday. Defining and training is not enough. We needed to capture the processes and use them in a system, assign people to the tasks, and track whether or not they are really following the processes. Time tracking tells you how much time people are spending on each task. That's the only way we'd know."



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C. Definition: Process.

Let's start with a simple definition of a "process." The word is used in many ways. I am referring to processes such as customer requested service fulfillment processes, the acquisition process or the Dev / Ops process. A process is a series of tasks performed in a certain sequence. When you think about it, this is also the definition of a "project," i.e. a series of tasks performed in a certain sequence.

In the late 1970's, a senior project manager at Litton Guidance and Control Systems taught me about "First Article Scheduling" which brings both process and project management together. He explained it this way: "Let's say you have a contract to put electronics in 100 boxes. The project manager follows the first box through all of the steps it goes through, writing down each step. Then, he follows the 2nd box through all of the steps and marks any changes from the first time. He does this a 3rd time, marks any changes, and writes up this 3rd way as the process. He puts the process into a project management system, shares the process with the people that do the work, and then tracks that the other 97 boxes are done this way." This is this type of approach we should use for managing IT processes.

One of the benefits of this approach is getting the buy-in of the people that do the work. If they are involved with defining the process, they are more likely to approve using the process.

D. "Waterfall" is Not a Dirty Word. Dev/Ops.

When considering Dev/Ops, the goal being to get new functionality into production faster, Eugene Kim wrote in his white paper [Top 11 Things You Need to Know About DevOps](#):

"Another recurring problem that occurs in the DevOps value stream between Development and IT Operations isn't sufficiently standardized. When this occurs, no mastery is ever built into the organization in procedures or configurations.

This is a good example of the problem that our approach addresses. Here is that term again. "Standardized" is the key term. Obviously, "standardized" is the opposite of "unique." What is needed is an ability to quickly and easily define and store the various processes used, and then use these processes to generate standardized project plans, to which people can be assigned, and their work tracked. What we are talking about is building a repository of processes, and then being able to use any one of the processes to quickly generate a project plan. The benefit is that, at network speed, a new project plan that includes all of the steps in the process is spawned. The same plan, every time.

There are multiple use-cases for this approach. Several are addressed at the end of this white-paper including customer focused service request processes. Being customer-focused is important and often forgotten. More use-cases are addressed in a separate white-paper found on our web site, www.projectremedies.com. It is called "PRI APM Plus Use Cases."

As a side note, we like the iterative "agile" development concept of defining and refining requirements. Having user involvement during the whole cycle is really important to an application's overall success.



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E. Definition: Project Management System.

People have given me all kinds of definitions of a project management system. The craziest was from a woman who had Post-It notes all over her monitor. When asked what they were, she called it her “project management system.” Surveys tell us that the most used “project management” tools are MS Word and MS Excel. These are not “project management systems.”

For me, a “project management system” connects scope, schedule, resources and cost. It includes the following:

- The entire project life-cycle is included so management has visibility at every step. Managing all of it in one system offers many benefits. You do each part of the overall life-cycle now, but manually or in separate applications.
- Work processes are stored as work templates. Approval processes are stored as approval templates. A template includes a list of tasks and a list of dependencies between the tasks.
- A project definition, “scope,” is stored so you can compare what is delivered with what was promised.
- For projects that need senior management approval, 5-10% of them, the project goes through a proposed project definition and multi-stage governance process, the 1st two phases of the entire project life-cycle. For the 90% that do not need senior management approval, these 1st two phases can be skipped.
- A project plan using critical path method scheduling is generated from a work template assuring standardized, consistent project plans. Information stored in the work template, the planned duration for each task and the dependencies between the tasks, is used with a Planned Start Date or Planned Finish Date to calculate when each task in the plan should be performed. Those tasks on the critical path are identified. This information is used to generate a Gantt chart.
- An approval process is used to approve the initial project and resource plan, and when the plan is approved, the approved plan is stored as the baseline plan.
- Distributed approach. People are assigned to work on tasks, and as they work the task, the people status the tasks. When they start working on the task is captured and when they finish working on the task is captured. The difference is the actual duration, and can be compared to the baseline plan.
- A time tracking capability is used so people can enter the time spent working the task. The actual time spent on a task can be compared to the baseline plan.
- A robust set of charts and reports is included.
- The application is based on Earned Value Management (EVM) techniques but made easy because IT projects are much smaller than multi-billion dollar Department of Defense projects for which EVM was originally intended.

This sounds like a lot of functionality and it is, but each person only touches their part and the system notifies them when they need to enter something. Having all of the information about a project in an application makes it easy for management to view everything about the project at any time. Having users update their own tasks improves communication and buy-in. One company that used our approach held status meetings every Tuesday night which usually lasted 3 hours. The 2nd week after they started using our system, it became a 30-minute meeting. They called the new system “No Excuses.”



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F. **Measure What You Manage: Improving Resource Performance.**

A smart manager told me years ago: “Let me give you the short course in improving performance. You can only do 3 things: train the people on the process, change the process, or fire the people, and today, you need the metric time-at-task to do any of them.”

The Project Details Report Measures Performance. Holding People Accountable. The classic project management system includes a Project Details Report. This report details performance and provides the information you need to hold people accountable. If you want to hold someone accountable, you need to tell them what you want them to do, when you want them to do it, how much time it should take, and possibly the cost of doing the task. Then, you have to inspect. Did they do it? When did they do it? How long did it take? How much did it cost? You are comparing actual results to the baseline plan. The Project Details Report lists each of the tasks that make up the project, and for each task, specifies:

- A summary description of the task including the definition of success.
- Status. Has the task been completed or not.
- Planned Labor Hours: How much time the worker has to do it.
- Actual Labor Hours: How long it took to complete the work.
- Planned Start and Finish Dates: When the work has to be done.
- Actual Start and Finish Dates: When they did it.
- Planned Cost: What should the cost be to complete the task.
- Actual Cost: How much did it cost to complete the task.

Imagine getting these metrics on all of the projects, including the small ones!! With these metrics in hand, management can have a conversation about improving efficiency, customer service, lowering cost. If you are trying to speed up a process or improve efficiency but do not have these metrics, there is really nothing to discuss.

Two examples. Service Fulfillment. Let’s say that you have people in three locations who work service fulfillment projects. The people in each area have no idea how quickly the others perform the work on each type of service and neither do you. However, if you have 3 – 6 months of these reports on the same thing performed by different organizations, you have the information necessary to effect change, improve efficiency and lower cost. You will see how long it takes each organization and if there are bottlenecks, where they are. Quality and the need for re-work can be measured as well.

Another example is the Acquisition Process. Let’s say, as part of this process, the acquisition package goes into Legal for a month. The question is: how much time do people in Legal spend on each package during that month? 1 hour? 3 hours? 120 hours? If these metrics are captured, actual time spent over the actual duration, management can have a conversation about speeding up the process. Without these metrics, there is nothing to discuss. It’s 2017. Does the package have to stay in Legal for a month? Using workflow functionality, the acquisition package can move to the next steps in the process electronically, speeding up the process.



III. Benefits.

With our approach, you will know when critical events occur or thresholds are crossed before reports are prepared.

Management Visibility. By defining processes, they will be visible to management. With this approach, management can see the status of any project at any time. The project scope is defined completely. The Steering Committee gets a complete package electronically and all of the packages are available to them before and after the meeting. Customers can also have visibility and see the status of their requests at any time.

Cost Trends are Captured. “Cost” comes into the whole project life-cycle at 5 points in time. With our approach, all are captured, allowing you to see trends. With this information, future forecasts will be more accurate.

Easier to Measure and Compare Performance. Thinking of projects as standard repeatable processes and using a “waterfall” approach makes them easier to track, manage and measure. If a process is stored as a work template and used to generate a project plan, besides eliminating the need to create a project plan every time, the plan is the same every time. (Of course, the 80/20 rule applies. Project managers can modify each plan as needed.) Because you are comparing apples to apples, it is easy to compare performance of multiple organizations.

Improving Performance. Capturing both duration and time-at-task are the metrics needed to improve performance. Both metrics are used together to indicate opportunities for efficiency. Employees who perform well want to be tracked so management knows what a good job they are doing.

Optimizing Resources. Improving Communication. The project manager or resource manager assigns people to tasks. The Project Manager or Resource Manager can see what each person is working on and how busy they are at the time. Leadership can see what everyone is working on. If the phone rings and priorities change, you might want to assign certain people to the new priority. You also might want to discuss with the caller whom you are putting on their priority and what you are taking them off of. The priority from yesterday? If you can quickly see what everyone is working on, this improves communication throughout the organization and builds confidence.

Building Confidence. Implementing Discipline. “Building confidence” throughout the company is another benefit. Defining and using repeatable processes tells the rest of the company or agency that IT is organized and disciplined. They experience the improvement in service when everyone works the same request the same way. Each person doing their own thing communicates the opposite to users; it communicates that IT is not organized, not disciplined. This detracts from confidence.

Capturing Cost. In an IT organization, labor (time at task), expenses and asset cost are 90% - 95% of the cost. If you are tracking all of this in the same system, and tracking work against customer service requests, you know the cost of each request. Since you know the requestor and his/her organization, you know the cost of the work performed for each customer organization. Since requests affect assets, the labor cost spent on each asset is captured at the same time, giving you the true total-cost-of-ownership of each asset. If you have a data center full of servers, you will know which one is the lemon.



Eliminating Training on Processes. If the process is stored in the work template and used to generate project plans, the workers do not have to be trained on the process, only to work the tasks assigned to them. If they want to see the process, they can click on the Gantt chart button. One user called this approach a “knowledge management system” because the process is stored in the work template. He said: “If the workers want to see the process, they can simply click on the Gantt chart button.” If you are a large, international organization with people all over the world, how do you train everyone on the process? And what do you do when a process changes? Train everyone again?

Focusing Everyone on Management’s Priorities. At the weekly meeting, the manager uses the “Should Have Finished” report to discuss what should have finished the week before, and the “Should Be Started” report to discuss those tasks that need to be started this week. This focuses everyone on management’s priorities.

It is important that each person understand how their task fits into the overall process, i.e. what their organization does, and if it finishes late, how this impacts everyone else and the goals of the organization.

IV. Establishing a New Mindset.

If nothing we do is done uniquely, thinking in terms of uniqueness and using applications assuming everything is unique does not help. A new mind-set needs to be established. Different tools need to be used.

Most project managers do not think about what they do as standardized, repeatable processes, and they need to. Usually, trained project managers are assigned to a single project, and their job is to manage that one project and insure it finishes on-time and on-budget. They are not asked to, and frequently do not even consider project similarities across their department or others across the company. It never comes to mind.

I recently experienced a good example of this. In preparation for a meeting with management of a large, international organization, I asked one of their senior managers who was coordinating the meeting if he would send me a process we could discuss during the meeting. He said he would, and sent me a MS Project project plan of his “Remedy Software Renewal Acquisition Process.” I looked at the plan and realized that there was nothing specific to Remedy in the plan; that it could be used for renewing maintenance on any software product. This plan could be a process, stored as a work template, and used again and again for other products.

When the meeting started, I explained how I thought about it, and the conversation immediately changed. The people in the room discussed the benefits they saw of having a repository of processes: reduced training, bringing new employees up to speed faster, eliminating silos, speeding up tempo, and that “it would make the process visible to management,” which stunned me. You mean the management of an organization responsible for managing the acquisition process does not know what the process is? I have told this story multiple times and no one else seems surprised which is equally shocking.



When the manager who gave me the MS Project project plan was asked how he came up with the plan, he said he sat down with his project manager the night before and they created it together. When asked how many times a year he does this same thing, the look on his face was “stunned.” He said he does the same thing 11 times a year. I have known this manager for years and can assure you that he is smart and a good, dedicated manager. He just never thought about it this way. This is why a new mindset needs to be established.

MS Project and applications like it do not help. They are designed for trained project managers (who are also trained to use specialized software) to develop unique project plans from scratch. And unless you are doing something you or your organization has never done before, they are not what you need. Besides, these applications are not useful for tracking and managing the entire project life-cycle, tracking performance, measuring resource utilization, improving efficiency, reducing duplicate effort, improving customer service or tracking cost.

There are other issues.

- Trained project managers, because they do not want to be embarrassed if the project finishes late or over budget and they were not aware of the reasons why, track every little nit that might affect the end-date or cost. The result are projects plans with 500 or 1,000 tasks or more. How about 3,000? Have you ever tried to understand a project plan for 500 or 1,000 tasks or more? It’s just impossible.
- If you have a distributed approach and ask workers to status their tasks, if you have project plans with 500 tasks or more, the workers will complain that they are spending all of their time statusing the tasks leaving little time to do the work.
- Project management systems like MS Project are difficult to use, so a bad choice for an enterprise approach to managing projects. In fact, team leaders manage most projects. The requirement then is to have a system that is easy enough for team leaders to use because team leaders, not trained project managers, manage most of the projects. You cannot afford to have enough trained project managers to manage all of the projects.

A. Defining Processes is Easy and Does Not Take a Long Time.

Defining processes is pretty simple. For each service your organization is asked to fulfill, categorize them into one of three buckets because there are only 3 possible service fulfillment life-cycles:

1. Can it be managed with a single task, be it an Incident or a Problem?
2. Does it require more than one task to manage, i.e. a project?
3. Is it a change that goes through the change process?

For ones that require more than one task to manage, bring people experienced with how this type of request is performed together in a conference room. Bring in a pad of large Post-It Notes, and ask them to name the steps in the process. Write each step down on a different Post-It Note, and put each one on the white board. When you have all of the steps, discuss the sequence. Put the Post-It notes in the sequence in which they are performed. Some will be done in parallel and some will be sequential.



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When finished, now ask: should the process be managed at that level, a more detailed level or at a higher level? Actually, it not very important at this point what they decide. Our experience is, when you put it into a system and people start using it, the process will most likely change until it is at the right level for everyone involved. This is what you want.

Process Owners. You might want to assign someone to be the “process owner.” The process owner is a scribe, not the definer of the process. This is a variation of the “First Article Scheduling” approach described above. The process owner will take the process through its approval process.

If you have a large organization and people in different geographic areas or different divisions disagree on what the process is, rather than argue about it (“Mine is better than yours), let each organization define their process, put each into production, and when people from their geographic area or that division requests that service, use their process to generate a project plan. Have their people work the plan, capture the performance metrics for 3 months and then review them with all of the parties. With the metrics, everyone will see which is best. Arguing about it up front is a waste of time and just creates hostility.

Continuous Improvement. When people working the process have suggestions about how the process could be improved, those suggestions should be sent to the Process Owner for review. This feedback loop is important. If the suggested changes to the process are approved and put into production, management’s question will be: Is the new process faster or cheaper than the old process? How much faster? How much cheaper? Only by having the metrics will you be able to compare. This step turns process development into a Continuous Improvement Process.

B. Guidelines. No One is Looking for More Complexity.

Parameters of a Process. What should a process look like? As a rule:

- A process should have more than 1 but no more than 50 tasks. Any more than that and it becomes too cumbersome for management to use.
- Processes can be linked together for re-work or to create an Integrated Master Schedule.
- The process might have 5 milestones, and approximately 10 tasks under each milestone. Some have called this “milestone” reporting.
- Each task should be at least one day long and no more than 5 days long. You want to make sure the work can be accomplished in a week so at the weekly status meeting, your team can discuss what was accomplished last week, and what has to be done this week. The weekly status meeting focuses your teams on management’s priorities.
- Multiple people can work the tasks in a process but only one person can be responsible for the task. The person assigned responsibility does not have to be a worker.

C. Managing the Complete Project Life-Cycle.

As discussed above, 5% - 10% of the project requests go through the complete project life-cycle, while approximately 90% do not. Nevertheless, the 90% of the projects still have to be tracked and managed.



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For our purposes, we will use the US Department of Defense definition of the project complete project life-cycle. Please see Directive 8115.01 on IT Portfolio Management. It includes 4 phases:

1. Analyze. Define the Project.
2. Select. Approve the Project.
3. Control. Track and Manage the Performance.
4. Evaluate. Review for Lessons Learned.

As another point of comparison, the Project Management Institute (keepers of the Project Management Professional (PMP) certification) defines the 5 project steps as: initiation, planning, execution, performance/monitoring, and project close.

Let's look at each phase more closely. We assume that a request has been made and the requestor's management has approved the request.

Phase 1. Analyze. Define the Project. This phase involves 5 steps.

- A. Initial setup. Name the project. Name the requestor. Enter how much the requestor thinks this will cost. Name the Department who will put together a more detailed definition. Assign someone to manage this effort. Categorize the project so that it can be grouped with similar projects. These groupings will be used for reporting and charting.
- B. Scope. Define what this project is all about including what success will look like when the project is finished. Include a project charter. Attach documents. Describe the rationale for this project and a return on investment. Describe possible risks and issues. Include a planned start month and year and end month and year.
- C. Resource Plan and High-Level Budget. Put together a high level estimate of the people, assets and expense dollars needed to complete this project. For people, this should be at the skill, location and organization level. Multiply these high level estimates by a rate for each skill. Add this to the cost for each asset, as well as an estimate of the expense dollars. The total is a high-level budget for the project.
- D. Track Budgets / Commitments. Spread the budget by type of money so we can keep track of monies committed and thus monies available for other projects. When actual costs are captured, the actual cost can be compared to the baseline plan.
- E. Set a priority for this project. How well does this project align with the organization's strategic plan? Some use these or other factors to calculate a numeric score. Others use a simpler A, B, or C categorization and then sequence the A's, then the B's, and then the C's. If there is a legislative mandate and a due date, others track these factors.

Phase 2. Select. Governance. Approve the Project.

- A. Gate 1. The manager of the Department that defined the project approves the project.
- B. Gate 2. The plan goes through a number of approvals using an approval template before it comes to the Steering Committee.
- C. Gate 3. The Steering Committee looks at all of the projects and decides which ones they want to move forward on. They say to the project manager: "We will approve this project tentatively for \$N. Please generate a project plan in this system which shows us how you are going to spend these monies, and come back to us for approval, using a shorter governance cycle."



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Phase 3. Control. Track and Manage Performance.

- A. The PM uses a template to generate a project plan, and assigns people to tasks either at the skill / location level or by name. The application uses this data to calculate a planned cost.
- B. The plan is sent to performing organization managers for approval and to confirm their buy-in.
- C. Steering Committee. The Steering Committee reviews the plan and approves the plan. They tell the project manager: "We have approved this project. We want you to use this system to manage the project and want you to send us the reports you normally send us, but be aware that this is a permissions-based system and we can look over your shoulder at the details at any time and you will know when we are looking. We want to make sure that you are delivering what was promised."
- D. The Project starts. People work the tasks, status the tasks, enter their time against the tasks, and if appropriate, update the related asset record. Periodic reports are generated and sent to management for their review.

Phase 4. Evaluate. Review.

- A. Lessons learned are reviewed. Templates are updated as necessary.
- B. Close out is completed.

While approximately 5% - 10% of the project requests go through this entire life-cycle, the ones that do not, the approximately 90% of the projects, start with Phase 3, Control.

D. Cost Trends are Captured.

One of the benefits of doing all of this in one system is tracking cost, which comes into the process at five (5) points in time.

1. At the very beginning, the requestor says that he thinks the cost will be \$N.
2. The people defining the project put together the high-level budget.
3. The Steering Committee says that they will tentatively approve the project for \$X
4. The project manager develops a project plan which is a different amount.
5. Actuals are collected.

With this knowledge, future estimates will be more accurate.

V. People's Roles and Responsibilities.

Let me give you a bit more information about the roles and their responsibilities of our approach. People can be in more than one role.

Process Owner. This is the person that owns the process and enters the process into the system. If a change to the process is needed, the process owner makes the change in the system. He/she might lead the effort to define the process, and if someone thinks the process should be changed, this is the person who would be notified with their recommendation. If your organization has an approval process for any process change, this person would guide the change through the approval process.

Requestor. The requestor is the person who made the request. He/she should be involved in the process confirming the requirements, and when the end-product is delivered, confirm that this is what he/she was anticipating.



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Approver. An approver is typically a manager involved in a governance process. He/she is notified when their approval is necessary.

Program Manager. The person in the Program Manager role manages multiple project managers, and oversees all of the projects assigned to the project managers.

Project Manager. The person in the Project Manager role need not be a trained project manager. Most often, this person is a Team Leader. The person in the Project Manager role insures that the project plan is what they want it to be, defines and tracks risks and issues, assigns people to tasks by skill/location or by name, coordinates approvals to the plan, and oversees the project plan as it is worked. The Project Manager leads, guides, and directs the accomplishment of tasks leading to project success. He/she approves change requests to the project plan, approves time and expense entries charged against each project, and reports project milestones and deliverables to the program manager.

Resource Manager. The person in the Resource Manager role is usually someone in the performing organization. He/she assigns specific people to tasks. This person might be a Supervisor who approves time and expense entries within their organization.

Manager of Performing Organization. The Manager of a Performing Organization insures that the work assigned to their organization is done on time and on budget. He/she approves time and expense entries for the people in the organization.

Person Responsible for the Task. The Person Responsible for the task insures that the work is done. He/she might request a change for the task if necessary. Changes might be in the duration, time allowed, scope, etc.

Workers. The people who work each task are notified when the predecessor task is completed indicating that they can start working on their task(s). They indicate that they are starting to work on a task by changing the status on the task from Assigned to In Progress, and indicate that the work is complete by changing the status on the task from In Progress to Complete. They enter their time spent against the task, and potentially update the asset record of the asset related to the task. They enter comments on their work if necessary and may comment on any suggested scope changes. Depending on your organization's rules, the worker might request changes to the project plan.

Administrator. The administrator manages data: adds, changes or deletes users to or from the system.

VI. Project Remedies Inc.

Project Remedies Inc. is a 25 year old Veteran Owned Small Business focused on helping large IT organization improve their processes. We are both a services and technology company. We bring process, people and tools together to help you transform your organization. Our goal is to be the lowest cost, lowest risk, highest customer satisfaction provider, and to bring value to our clients every day.

We do 3 things:



Project Remedies Inc.

1. Perform Assessments and Transformation Projects.

Our work often involves helping organizations define and operationalize their processes to improve their project management and governance efforts, as well as service desk and data center consolidation projects.

2. Place Subject Matter Experts on Long Term Contracts.

Having been in this business for 25 years, we have a group of very good senior consultants with a variety of skills. They are normally senior Remedy architects and developers, process consultants and project managers. We look for people who have 7 attributes. Are they:

1. Smart? There's nothing quite like brains.
2. Mature? They know how to show up and work with clients.
3. Nice? No one wants to work with a jerk.
4. Honest?
5. Team players
6. Finish projects.
7. Innovative.

We know that if you have the right people on the project, you can get things done, and the inverse is true as well. If you do not have the right people on the project, things won't get done. Project Remedies takes the guess work out of finding subject matter experts.

3. Market ActionProgram Manager Plus.

ActionProgram Manager Plus (APM Plus) is a Remedy-based process and life-cycle management system. It includes all of the functionality described in this paper, and leverages your existing Remedy investment to reduce costs.

About ActionProgram Manager Plus, one user said that "it was the only project management system I've ever seen work." When asked why, he said: "Every other project management system requires that everyone know everything about project management up front and they just can't. APM Plus distributes the functionality in a way that enhances people's existing responsibilities. It helps each person do their job better and does not make major requirements on their time."

If you would like to discuss your specific situation or would like more information about Project Remedies Inc, please call Stan Feinstein, our President, at 310-230-1722 or via email. Stan's email address is stanf@projectremedies.com.

VII. A Few of the More than 17 Use Cases for ActionProgram Manager Plus:

A. OneIT: The Easiest, Fastest, and Cheapest Way to Create a Remedy-Based Demand Management System.

Because it was developed with the Remedy Action Request System, ActionProgram Manager Plus runs on the same platform and integrates with the applications that make up the Remedy IT Service Management Suite. The combination is a fully integrated Demand Management System that tracks work and captures performance metrics at every work touchpoint. Because APM Plus integrates with your Service Catalog, you can be assured that nothing will drop through the cracks and your



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performance metrics are accurate and complete. MS Project users have told us that this is a major issue for them.

B. Service Fulfillment. Capturing Total Cost of Ownership.

Services requests can only go down 3 life-cycles: 1) managing with a single task, 2) as a change request, or 3) as a project. All are linked to assets. With our approach, the total cost of ownership of each asset and each service request is captured.

Using Remedy workflow functionality, a complex service request in the Service Catalog, i.e. one that should be managed as a project, will either launch the complete project life-cycle or just generate a project plan at network speed. People are assigned to tasks. They work the task, status the task, and enter their time against the task, whether it is an incident, problem, change, or project task. In that way, you are capturing all of the time spent on a service request. Multiplying the labor hours times a rate gives you 95% of the cost of each service request.

Similarly, requests are related to assets. With our approach, a worker who works on a task, whether an incident, problem, change or project task can update the related asset record directly from the task. If you are doing time and expense tracking, you know the amount of time spent against each asset, which is a part of the total-cost-of-ownership of each asset.

The time and expense entry functionality and its Universal Timesheet can be attached to all types of Remedy tasks, i.e. incidents, problems, and changes, so that workers can use one system, the Remedy system, to enter their time against all tasks.

C. Dev/Ops.

At every conference on Dev/Ops I have attended, the speaker has said that the best way to solve the Dev/Ops problem is to have everyone in the IT organization use the same system, and that's exactly what we are preaching. In his white paper [Top 11 Things You Need to Know about DevOps](#), Eugene Kim talks about "embedding IT Operations into Development" or ". . . putting Development into IT Operations." It is a lot easier if everyone is using the same system.

Please see our white paper, **OneIT – Eliminating the Dev/Ops Problem** for more information on this integration.

D. Rapid Cyber Remediation Response Management.

Planning is the key to Cyber Remediation Response. When you are attacked is not the time to start thinking about what you are going to do. Various scenarios have to be defined, put into production and practiced so everyone is aware of what the response will be. Storing these scenarios in APM Plus makes sense, because most likely, a cyber warrior, i.e. a technician is going to discover the attack. He/she has to sound the alarm and the process needs to be started as quickly as possible. A work plan stored in APM Plus is launched at network speed. Everyone will know what they should do. Speed is critical.

The other good thing about using APM Plus is that your service desk can look at see where the remediation effort is. Most likely, someone will call the service desk and say: "The network just stopped working. Is something going on?" Because the service desk uses the Remedy system, users there will be



Project Remedies Inc.

able to access APM Plus and tell the caller exactly what has happened and where they are in the remediation process.

About tracking cost, a manager at the US Department of Homeland Security said: “If we knew that each remediation effort cost \$125,000, we might not want to do it.”

APM Plus includes all of the capabilities that are specified as requirements in the National Institute of Science and Technology (NIST) Special Publication 800-61 R2 on Cyber Incident Response, and more.

Please see our white paper **Rapid Cyber Remediation Response Management** and our white paper **Complying with NIST SP 800-61** on our home page at www.projectremedies.com.

E. Managing Scheduled and Unscheduled Asset Outages.

This use case starts in Asset Management rather than in the Service Catalog, and involves unique functionality added to APM Plus for this application.

Let me explain. To maintain an asset, tasks need to be done before and after the asset comes off-line. The target date, when the asset comes off-line, is in the middle of the process, and this is normally a problem for project management systems. Project management systems deal with “planned start dates” and “planned finish dates,” not “middle dates.” When thinking about this problem, we realized that the “target date” is the “planned finish date” for the tasks that come before, and the “planned start date” for the tasks that come after, so we added functionality to APM Plus so that the Critical Path Method Date Calculator in APM Plus would schedule these tasks correctly.

For each asset or class of assets, several data items need to be pre-defined:

- When the asset comes off-line. For example, the 3rd Sunday of the quarter at 2:00PM.
- The frequency: daily, weekly, semi-monthly, monthly, quarterly, semi-annually or annually.
- Which work template to use for the asset.
- The person responsible for the asset, i.e. the person who assigns people to work the tasks to maintain the asset.

Then, a week before the first task needs to be performed, automatically using workflow, APM Plus generates a project plan and notifies the person responsible for the asset that he/she needs to assign people to each task. Each task is put in the person’s Overview Console as just another task they need to work. As with the other tasks, they work the task, status the task and enter their time spent on the task.

In addition, the system adds all of the tasks in the plan to the asset record’s “related items tab” so you can see all of the tasks that have been performed or will be performed on that asset. In addition, if you are doing time tracking, the cost of the labor can be put on the asset record, so you know the total cost of ownership of the asset. This is done automatically using the workflow functionality in the Remedy Action Request System.

For more information or to discuss your situation, please contact Stan Feinstein, President, at 310-230-1722 or at stanf@projectremedies.com.