

# EPMA

## Project Management Training

### PORTFOLIO MANAGEMENT



Greystone Affordable Development approached EPMA with the request for help in streamlining their project delivery process. They had already been utilizing Microsoft Project, but hadn't yet adopted MS Project Online. They had instead been using a combination of Excel and OneDrive to keep things straight. We knew pretty quick that Project Online would be the solution for them. However, it wasn't just a matter of setting them up, so much as was teaching them how to leverage it correctly and effectively.

## THE KEY ISSUES

Greystone faced a number of fun hurdles. Their increasing number of projects, along with the complexity of managing their portfolios across multiple departments, was having a negative impact on their operational readiness, project execution, and portfolio close-out compliance.

They were also using a combination of MS Project and MS Excel to manage their portfolios, causing even more issues when it came to tracking these projects.

### Challenges that the organization faced:

- Cumbersome resource-allocation projection
- No way of tracking & managing their many portfolios/portfolio overlaps
- No way of estimating project costs or reimbursements
- Lack of unified reporting across all portfolios

## OUR SOLUTIONS

Our meetings with Greystone made it clear that they lacked standard metrics for measuring performance, which resulted in a lack of visibility into their current resource workload. To fix this, we created a 'Rapid PPM Deployment' strategy. This plan covered a week of on-site engagement, as well as pre-engagement support leading up to our arrival, and allowed them to complete requirements gathering on their own (with our provided template) to plan their PPM solution. Once we arrived, we joined their ranks to provide the following:



### 3 Days of Administrator Training -

We partnered with the Greystone Project Online administrators to configure their PPM solution, incrementally as we progressed through the training agenda.



### 1.75 Days of Project Manager Training and Workshops -

Project Managers were trained on a fully configured PPM solution, complete with enterprise resources and schedule templates.



### 2 Hours of Team Member Training -

Team members (Project Resources) were trained on using the PPM solution, allowing them to manage and submit timesheets and submit task updates to their respective task managers.

## VALUE ADDED

By the end of our visit, we were able to leave feeling confident that Greystone now had a centralized location for all resources that accurately worked for them. The enhanced and simplified resource management practices they now had in place could be proudly leveraged for visibility and ultimately brought them:

- A streamlined portfolio delivery and closing process
- An effective tool for communicating project status internally as well as externally
- Improved cost projection of projects
- Improved resource utilization and forecasting