Top 5 Mistakes During Project Management Software Implementation by Enterprises

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Introduction

Since 2004 the Birdview PSA' team has been helping thousands of companies implement project management software in their organizations.

Over the years we've witnessed a number of successes as well as some failures. Working closely with our customers we tried to analyze what went right or wrong in each case has given us a unique perspective and expertise on what causes Project Management Software implementation to fail, and more importantly, how to avoid these errors.

This whitepaper highlights some of the common implementation mistakes that we encountered and offers business-proven solutions on how to resolve or prevent them.

Mistake #1: Implementation in the PMO Only

We've seen this scenario many times. An organization would acquire a PM tool (often that would be MS Project) and only mandate the Project Management Office (PMO) to use it.

PMO would create a project plan and schedule and send it over to the rest of the organization for execution. However, if all other teams and departments work in their own isolated silos, without being able to provide feedback and communicate back to the PMO tool, then this approach will fail. Top-to-bottom, waterfall planning rarely works these days.

For the plan to be realistic and for the projects to be completed on time and within budget, each team needs to be connected to the centralized PM platform and be able to provide real-time updates on its progress, status, and timeline.

Best Practices

- **Start with a pilot project for a single department/team first**. Mandate the use for everyone on the team. Use this pilot to iron out any wrinkles in the communication protocols or business processes. Once the collaboration between the PMO and the pilot team is smooth, everyone is on board, and at any given time the project management software shows an up-to-date schedule, and starts adding other teams to the tool.

- **Based on our customer's experience, 30-45 days is the optimal timeframe for the pilot project**.

- **It's imperative to decide on the specific goals and success criteria**. Saying "We're going to implement a PM tool because we want to be more effective" is cute, but doesn't work as a real goal. All stakeholders need to understand which metrics need to change and within what timeframe.

- **Choosing the right metrics is tough**. Few organizations can formulate them from the get-go. So to help you, we assembled some real-life examples from our customers:
  - Increase the percentage of projects that complete on time by 60%;
  - Decrease employee stress level by 20% by the end of the next quarter;
  - Decrease time required to produce weekly portfolio status report from 5 to 1 hour.

Mistake #2: Full Access for the Executive Team

Its standard practice is to provide your C-level team with full access to a project management platform, so they can see everything. Just because it is standard, doesn't mean it is necessarily the right practice. Most likely, your exec team will ignore the system after a few attempts to use it. Reasons are rather trivial: usually, it is due to too much data and lack of time. If you've ever asked your kids to figure out how to use a remote for a new TV, you know what we're talking about.

Best Practices

Limited access. Add visibility to projects on an as-need basis. Each executive might have a different set of projects to monitor, and control (using portfolios) will help.

Pre-configure and personalize accounts for each member of the executive team. Including a default start page, pre-set filters, saved views, etc.

Pre-create reports and dashboards. Once your exec team starts using the products and sees their value, you might discover that it's now much easier to get things done when it comes to additional resources. It's one thing to say: "If we don't hire more people or pay overtime, we might miss the deadline", but if you accompany this message with a Resource Loading report, you will be able to back up your request will numeric data. The harsh reality is, people, tend to trust computers and numbers more than they trust their colleagues, and coming up with empirical data gives you a stronger leg to stand on.

Mistake #3: Lack of Support from the Team

People hate change. It's human nature to try to maintain the status quo. You'll always encounter internal resistance when you start implementing a new system. Especially in the case of project management software. Some people might be concerned about management having full visibility into what they're doing. Others simply don't see a value in something that seems more complicated than it is, and treat it as a waste of their time to learn and adapt to: "We've been doing fine for years without any of these fancy apps." Not only is it human nature, but it's also nature's law. Newton's first law states: "Every object will remain at rest or in uniform motion in a straight line unless compelled to change its state by the action of an external force." Sound familiar? Unfortunately, there is no universal solution to this issue.

To combat these issues, some of our customers have chosen a more authoritarian approach: "If you don't use the system - you don't get paid." Of course, this method might not work in every work environment. Plus, nature will work against you when enforcing this approach. Again, let's quote Newton. His third law says:

> "For every action (force) in nature there is an equal and opposite reaction."

With this approach, it's not uncommon to see some employees getting creative with their sabotage: "I didn't finish my job on time, because I was busy updating status and time in your new application" or "I didn't have any tasks assigned to me, so I didn't do anything."

Best Practices

- **Employees must reap real personal benefits from using a project management tool**. Some of our clients no longer require managers to prepare and submit Excel-based reports, since all data is now available in real-time. Some let their employees leave early on Friday if progress and status update is available for all of their assignments. Of course, the exact solution will depend on your business processes and company culture.

- **Finding a product that is easy and user-friendly for the nontechnical team members as well as those without a deep knowledge of project management practices**. Most people don't have time or desire to learn a complicated tool. There are various approaches to handling this. For example, here at Birdview PSA, we design different product modules with the target users in mind. Pages heavily used by project managers e.g. Resource Loading Simulation, Interactive Gantt chart, etc - have richer functionality; and pages for the project contributors e.g. My Assignments or Kanban Board are simplified to keep the learning curve to the minimum.

- **Pre-configuring accounts for all types of users. The same way we discussed for executives, proved to be very successful for a number of our customers**. Yes, it takes more time for the administrator to set everything up upfront, however, it is totally worth it in the grand scheme of things. Upon receiving their login and password, new users can hit the ground running without having to learn any complicated or "techy" practices. Opening a to-do list style page like "My Assignments" is as easy as checking their emails.

Mistake #4:
Isolated Implementation

It's a typical, albeit not always obvious problem. A PM tool is rolled out without any links to other systems. Within an enterprise, the value of project management software directly correlates with the number of other information systems it's integrated with. Such integrations drastically decrease double data entries, simplify reporting and sometimes remove the need for additional training.

The good news is that most of the modern project management platforms have built-in APIs, which makes integrations a breeze.

Best Practices

If one of your teams is already using a task management tool and is happy with it, that's fine. Let them use it. Just make sure that tool can feed its data to your central PM platform. CRM? Excellent, connect it too. Ticketing system – integrate! After a while, something magical is going to happen. All of a sudden you'll be able to see the status and project progress across all departments, and the information will flow freely between your teams; they will communicate and collaborate effortlessly. Cross-functional projects will now be completed faster and quarterly budgets that used to take weeks to put together will now take less than a day.

Using Business Intelligence tools to combine data from different systems into a single data warehouse will help you discover insights: data trends, dependencies and correlations. For example, if you tie together your PM application with HR system you might discover that your projects tend to complete on time, only when Johnny takes a vacation.

Mistake #5: Solely Technical Implementation

When purchasing a project management software some organizations only consider the technical side of the roll-out: configuration, training, and sometimes integrations. In our experience this approach only works with small teams with simple workflows. For mid-size and enterprise businesses we definitely recommend to review their PM processes at the same time.

Best Practices

- **Start with the PM methodology audit across your organization**. Find out if some of your processes are outdated and whether there are better and more efficient ways to manage projects.

- **Train your teams on PM methodologies and processes**. For example, if you're implementing a tool that supports Agile methods, however your employees don't understand and share agile principles, even the best product can fail.

Bringing in a new PM tool is the perfect time to realign your employees' skills and workflows with your organizational goals.

Conclusion

In this whitepaper we covered five common mistakes while implementing project management software within an enterprise:

1. **Implementation just in the PMO;**
2. **Full access for the Executive Team;**
3. **Lack of support from the team;**
4. **Isolated Implementation;**
5. **Solely technical implementation.**

Some of these problems might seem trivial, however if you keep all of them in mind when introducing a new project management tool, your success will be imminent.

Happy implementations!

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