



# STRATEGIES FOR INTEGRATED PROJECT MANAGEMENT IMPLEMENTATION

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## A SMART DECISION

As a construction management consultant for over 25 years, I know from experience that implementing your project management software requires a different set of considerations than the ones for implementing accounting software. The good news is that by following some simple guidelines, the roll out of your companywide project management investment doesn't have to be stressful. If your business is experiencing difficulty tracking project activities, costs and revenues, improving workflow or just determining accurate job projections, implementing Viewpoint Construction Software's® integrated Project Management™ should smooth all the wrinkles.

An accounting implementation typically requires a "go-live or cut-over" date which is followed by a period of parallel processing for checking processing integrity. Implementing Viewpoint Project Management is notably different. Since project management consists of a number of discreet processes, there is much more

flexibility. These processes can be implemented individually which allows for a "phased" implementation strategy – generally a smoother, less disruptive implementation. The advantages of a phased implementation strategy go even further:

- Breaks implementation down into digestible and understandable chunks.
- Less disruptive since you're learning one process at a time before going onto the next process.
- Allows training to be performed in shorter web-based sessions that are closer to the time of use – resulting in better retention of training details.



## PROJECT MANAGEMENT IMPLEMENTATION

For a better understanding of successful project management implementation, knowing the areas to focus on is important. The planning and execution of project management implementation can be broken down into three logical areas:

- **Implementation routine** – The process that is followed by the implementation team to learn and configure the software and get it ready to implement. This part of the implementation ends with beta testing.
- **Implementation sequencing** – This step decides the order in which the various software processes will be implemented.
- **Rollout strategy** – The methodology that will be followed for company-wide software implementation.

The following section takes a deeper look at each area of project management implementation by breaking down the details.

## IMPLEMENTATION ROUTINE

The routine for getting each process ready for implementation rollout is essential. This includes implementation training, system configuration and defining the related work routine. Although the implementation routine may vary, here is an 8-step example of a typical implementation routine that could be followed to implement a process or process group.

### **Step 1: Viewpoint Skill Builder Series On-line Training** –

Review the Viewpoint Skill Builder training sections related to the process being implemented – includes implementation and/or process training available. Available on the Viewpoint customer website, Vantage Point, and directly from any help menu on any form in Viewpoint V6 Software, version 6.3.

### **Step 2: Process Walk-Through**–

Walk through the process and identify what's handled in and outside of V6, reviewing related V6 forms and compiling questions for Viewpoint consultants.



### **Step 3: Viewpoint Consulting –**

Arrange a web-meeting with a Viewpoint consultant to review your plan for implementing the process. These short sessions will ensure you are fully utilizing the Viewpoint Consulting Services team to help avoid overlooking critical details.

### **Step 4: Finalize Configuration–**

This involves form clean-up, removing or adding fields and adding custom buttons as needed.

### **Step 5: Define reports and any modifications needed –**

Finalize reports before implementation since these are critical to users for enhanced efficiency.

### **Step 6: Define and Document Work Routine for Process –**

Indicate who's responsible for the process at different stages. A 3-part outline including a graphical representation, a step-by-step description and a review of reports used is an effective way to represent the routine. Submittals and change orders are examples of processes that would benefit from establishing a work routine.

### **Step 7: Beta test process on**

**test job(s)** – It's important to test the process on a couple of jobs to work out the kinks before implementation rollout begins.

### **Step 8: Final Revisions –**

Revise configuration, reports and work routine in preparation for final implementation rollout.

## **IMPLEMENTATION SEQUENCING**

Determining the order in which the individual project management processes will be implemented is an important consideration and must be decided in light of overall implementation and management objectives. Other factors may enter into this decision such as the level of V6 technical knowledge of the project management implementation staff.



## ROLLOUT SCHEDULING AND STRATEGY

It is helpful to develop a roll-out schedule which incorporates the implementation routine and displays how the implementation will move from one division to another. A successful rollout schedule should provide the timelines and sequences necessary to manage the implementation.

When rolling-out company-wide project management software, here are four steps that should help minimize disruptions and frustrations.

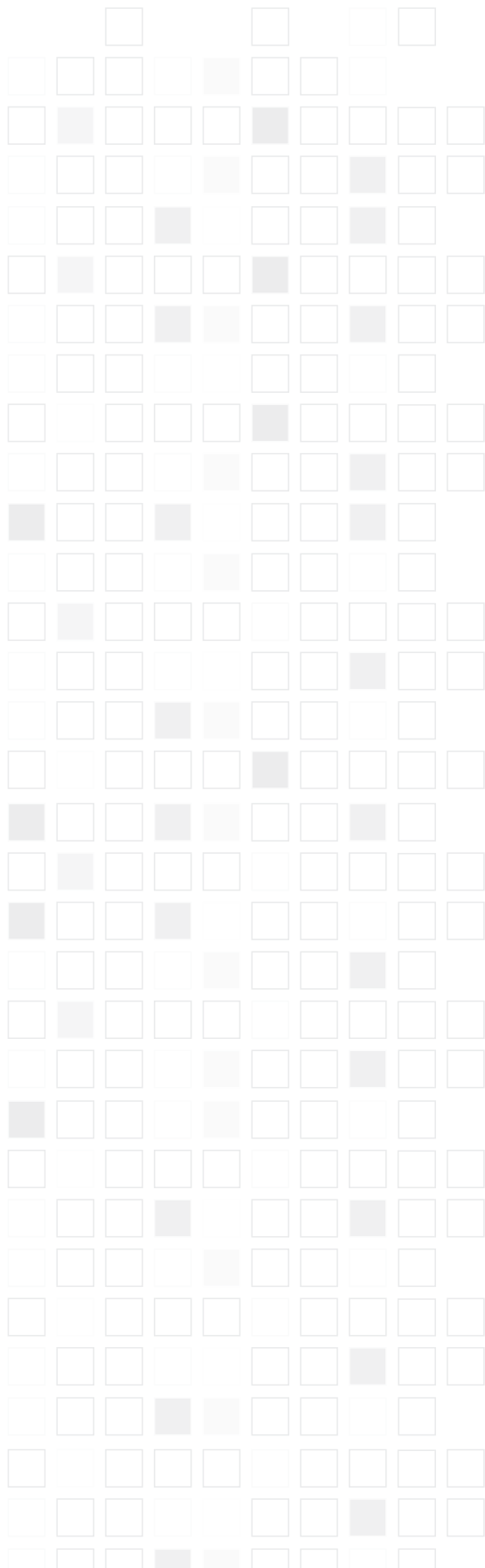
**Step 1:** Each PM process (submittals, change orders, etc.) should be sequenced and implemented as if it were a standalone process. The sequencing path from one division to another should remain the same for all processes. Refer to the sample Implementation Schedule for illustration.

**Step 2:** Avoid implementing more than one process in a division at a time. This reduces complications and allows knowledge to build as processes are mastered. Start with the strongest division first and avoid

moving to the next division until the process is functioning well in the previous one. You will benefit when implementing follow-on divisions.

**Step 3:** Try to implement processes on new jobs only. Trying to retro-fit new processes to on-going projects can cause a whole host of additional problems such as data conversion.

**Step 4:** Stick to the implementation routine. Continue with the routine or the implementation rollout could breakdown. Get the necessary training and be prepared to make changes if the routine isn't working.



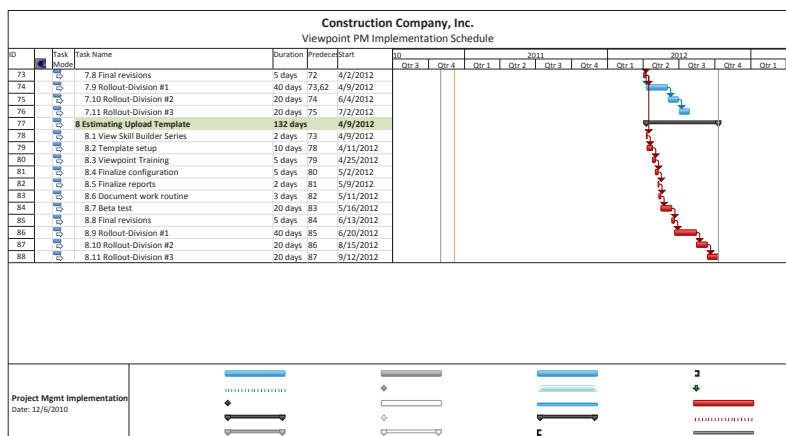
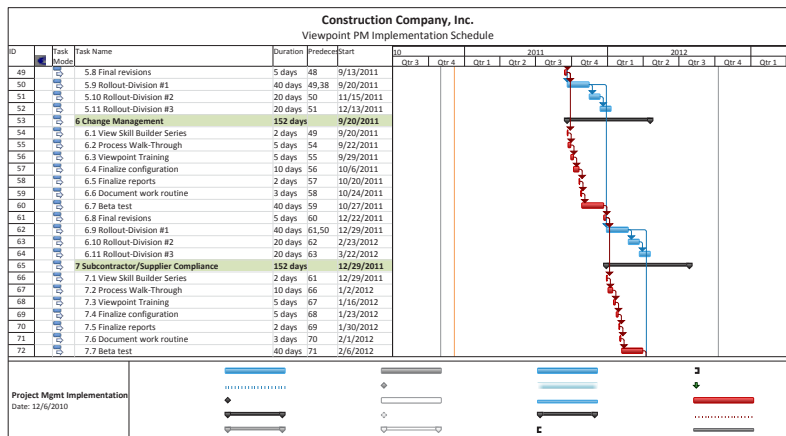
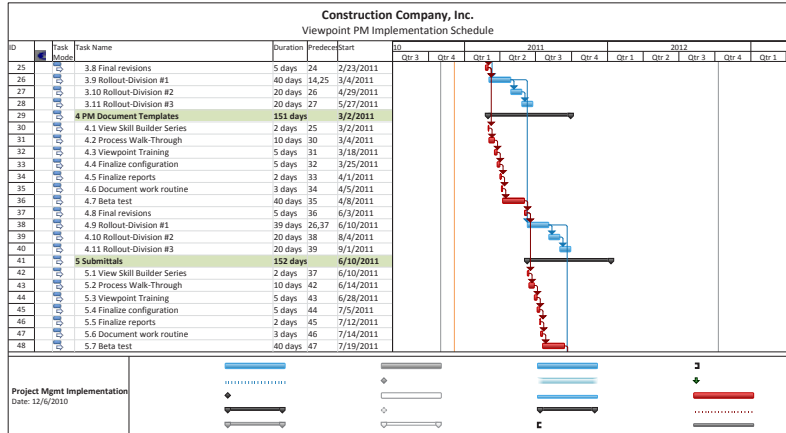
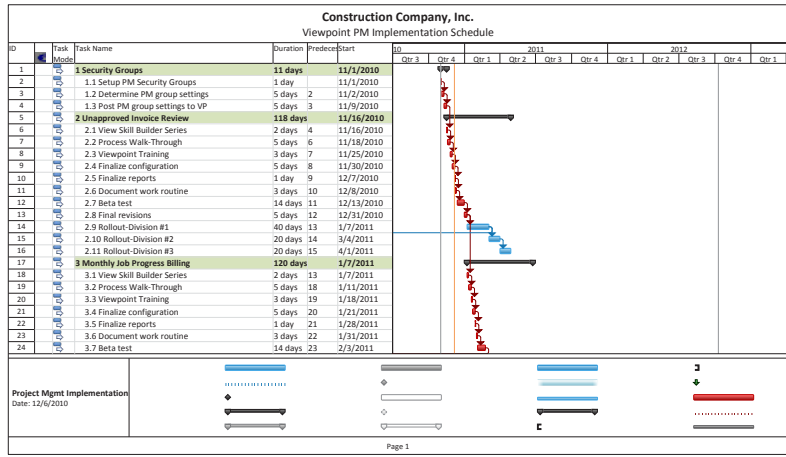
## THE RIGHT TIME

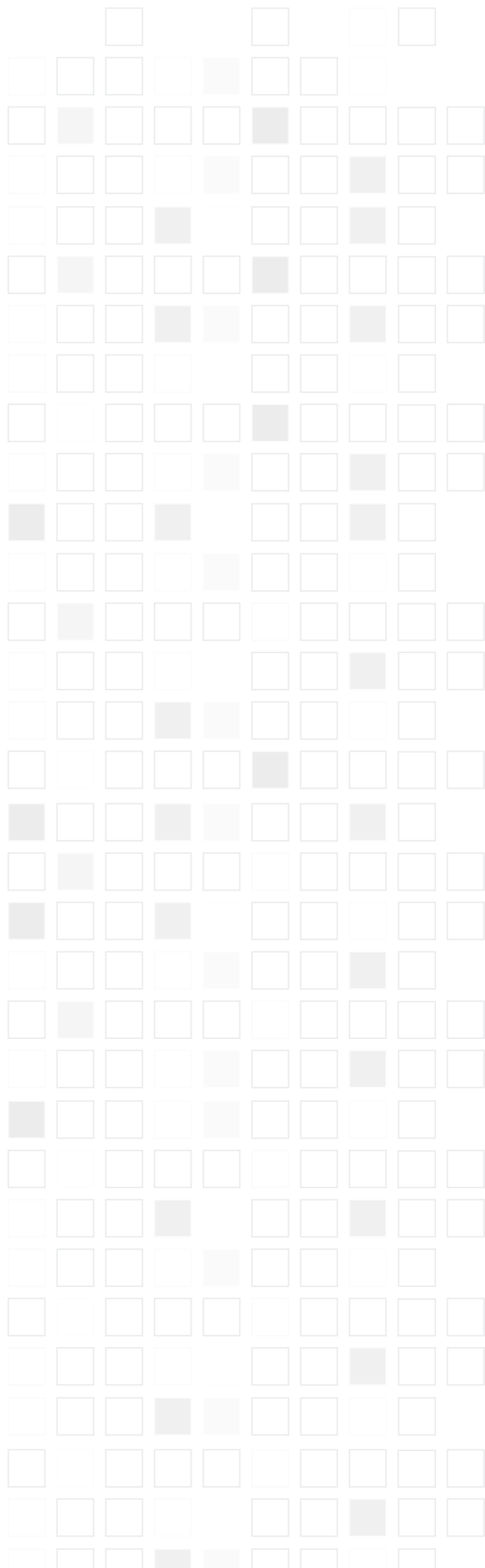
Viewpoint Project Management is designed to streamline the workflow of any project. It is becoming more and more difficult to achieve on-time, profitable jobs without a project management tool to facilitate all the complex work activities that occur simultaneously. By exploring Viewpoint's Skill Builder Series On-line Training, establishing an implementation routine and rolling out the software one division at a time,

your company can experience fast, noticeable results around workflow and ultimately your bottom line.

When you're ready to implement your project management software, Viewpoint's ready to help. Contact your Viewpoint Account Manager today at 971.255.4800 to learn more.

# IMPLEMENTATION SCHEDULE





## ABOUT THE SUTOR GROUP

Founded in 1981, The Sutor Group provides a comprehensive approach to construction management, offering financial, operational and project management services to clients ranging from start-up operations to Fortune 1000 companies.

Bob Sutor is a principal and co-founder in The Sutor Group. Bob holds an MBA from the University of Washington and a CPA license. Bob has 25 years of experience in the construction industry with significant training in all aspects of construction industry management. Bob has held industry positions such as acting CEO, Executive VP, General Manager, Comptroller, Board of Directors member and Board of Directors Chair.

Visit us at [www.sutorgroup.com](http://www.sutorgroup.com).

## ABOUT VIEWPOINT CONSTRUCTION SOFTWARE

With over 30 years of experience in the construction industry, our comprehensive software suite and unparalleled customer support is there to make sure you experience smoother, easier and ultimately more profitable job results. Viewpoint V6 Software is a fully scalable and integrated SQL/.NET solution tailored specifically for mid-to-large sized construction companies. Unifying all the unique departments in your business from Accounting to Operations to HR, V6 provides you with real-time data - wherever and whenever needed.

Visit us at [www.viewpointcs.com](http://www.viewpointcs.com), or contact your Account Manager at 971-255-4800 for more information.