

# SharePoint based Project and Portfolio Management Tools

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## **Overview**

Since the first release of SharePoint in 2001, it has been hugely successful in delivering team collaboration capability. Recently however, with the release of SharePoint 2010 a range of SharePoint based Project and Portfolio Management (PPM) tools are entering their second and third generation. It is the purpose of this whitepaper to explore these SharePoint PPM offerings and discuss where they sit in the context of more traditional Project Management tools.

## **Author**

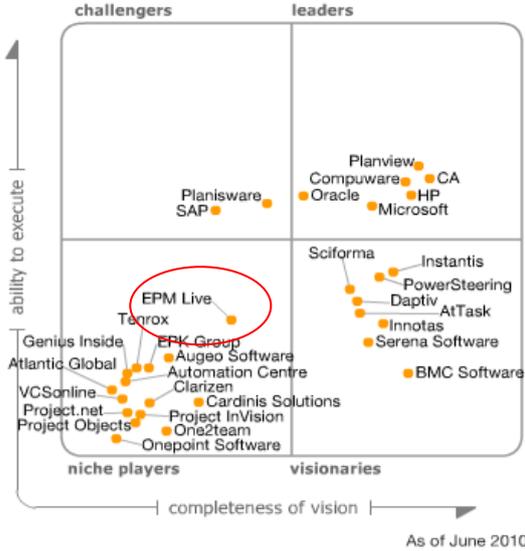
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**Introduction**

Previous whitepapers have discussed last years' Microsoft Project Server 2010 release. This was a significant release for Microsoft as it was fully integrated with their SharePoint 2010 platform.

Many people reading this will be familiar with the more traditional role of SharePoint as a collaboration tool and portal solution. Equally, there will be a familiarity with the capability offered by a range of traditional PPM tools and associated planning and scheduling toolsets. Some may also be aware that many of the functional aspects of a dedicated PPM tool can be achieved using heavily configured SharePoint integrated with an appropriate scheduling tool.

There are a number of PPM SharePoint offerings that have been released to the market over recent years and are now receiving a good deal of attention. This whitepaper will explore the pros and cons of these offerings and discuss where they sit in the overall PPM marketplace.



Gartner Magic Quadrant – SharePoint based EPMLive shown circled.

Source: Gartner Magic Quadrant IT Project and Portfolio Management (June 2010)

**Enterprise Portfolio Management**

Over recent years the terms EPM (Enterprise Portfolio Management) and PPM (Project & Portfolio Management) have been used fairly interchangeably. The term EPM implies that it is applied across the enterprise or organisation. In the context of this whitepaper we will refer to tools as PPM tools regardless of the breadth of use across an organisation. PPM tools may be used for a temporary project or program or may be used more permanently across areas of an organisation.

**PPM Tools Marketplace Overview**

It is not the intention of this paper to discuss the whole range of PPM Toolsets in detail; however a brief overview has been included in order to illustrate how at least one SharePoint PPM is placed in the market.

The leading analyst firm, Gartner, produces an annual report called the 'Magic Quadrant for IT Project and Portfolio Management'. This report details an assessment of the PPM tool marketplace, while providing excellent summary results in the form of the 'Magic Quadrant' itself.

The Gartner Magic Quadrant is a useful industry standard measure of the toolset capabilities and the state of the companies who produce them.

While most companies are interested in the top right quadrant area, products in other quadrants should not be overlooked. The products in the top right quadrant are there partly because of the comprehensive nature of their solution. They provide portfolio, financial, time-sheetsing, project collaboration as well as other capabilities. While the leading toolsets are suitable for certain organisational environments, the same can also be said for other toolsets outside of the top right quadrant. Organisations who don't need all of these components may be able to find appropriate and more cost effective solutions in other products.

The SharePoint based products such as EPMLive (now called WorkEngine) are one such set of products. The SharePoint based products tend to be applicable to organisations who:

- Are pursuing a standardised approach for the first time.
- Engaging with a PPM toolset for the first time
- Currently use SharePoint to support project delivery
- Find that standard office products such as Word, Excel, PowerPoint and MS Project no longer provide acceptable levels of efficiency / effectiveness
- Require greater visibility of their portfolio of work

## Organisational PPM Maturity and Tool Selection

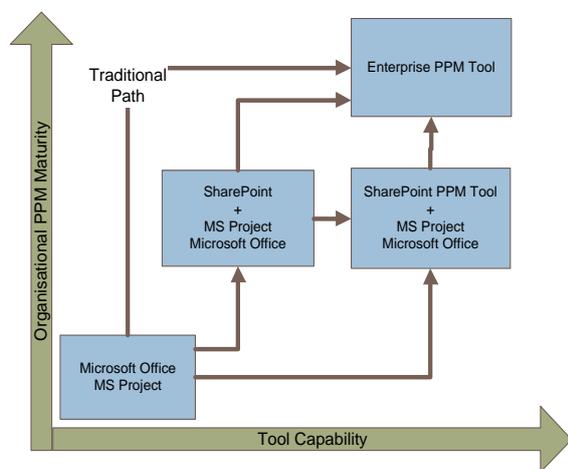
It is important that there is not too great a mismatch between an organisation’s project management maturity and the tools being adopted. It is this understanding of maturity that enables the organisation to correctly define the required operating model for the tool and to select the most appropriate solution. If the target operating model is not well understood it is likely that either the wrong tool will be implemented, or perhaps not configured correctly.

In trying to develop Portfolio and Project Management maturity, we typically find that organisations take one of the following paths:

1. Stay with their current toolsets and seek process improvements to achieve better project and portfolio outcomes
2. Develop or implement bespoke solutions that address specific capabilities such as reporting or resource management
3. Adopt part or all of a PPM capable product (of which there are many).

Organisations who choose option three tend to move from using Microsoft Office (and perhaps MS Project) to a dedicated PPM tool in one move. Success rates for this option can vary tremendously and the benefits gained are directly related to the capability of the organisation to leverage the new software to deliver on their target operating model.

The following diagram illustrates the typical adoption path of Toolsets for an organisation and shows where a SharePoint based PPM tool might fit in.



You can see from the diagram the traditional adoption path from an initial Microsoft Office Toolset to a PPM such as Microsoft Project Server, Clarity or Primavera. While that is an approach that can work for some organisations, there is now an alternative offered by SharePoint based PPM tools.

While the SharePoint path via SharePoint was once seen as unorthodox, it is now becoming an accepted approach for its lower risk and more immediate return of benefits. For organisations who see PPM implementations as scary, SharePoint solutions offer a familiar use experience.

We are also witnessing an increase in organisations who thought they needed a top quadrant product but have been able to realise their intended benefits using a SharePoint based solution.

An additional consideration in the operating model is whether it is internally or externally hosted. Should the organisation develop the technology operations skill sets to maintain the servers and software within the organisation or should they “outsource” this to a service provider?

If the decision is to outsource to a service provider should they do this under a Software as a Service (SaaS) model, typically involving hosting company shared environments. Alternatively, for security reasons do they require a stand alone environment (not shared). These decisions have implications on cost, delivery timeframe and potential on the degree of configuration / customisation available.

This decision may be impacted as well by the need to involve partners, suppliers and third parties in collaboration. A joint venture project for example cannot be run on a PPM solution living behind one partner’s firewall. In some large multi partner programs an Internet solution is the most practical.

## SharePoint PPM Tools

At the top level of PPM tools, there is an expectation that they will be able to cover all of the expected functional areas and be able to offer a high level of functionality.

While mid level SharePoint PPM tools don’t attract the same level of expectation as the leading PPM products, they do offer a good level of functionality.

Typical functions offered by tools such as WorkEngine include:

- Integration with Microsoft Office suite for importing and exporting data and reports

- Integration with desktop MS Project for schedule (and possibly cost) information
- Provide portfolio view of all high level project information
- Business intelligence reporting
- Schedule management at the project and portfolio level
- Financial management and tracking for projects and portfolio
- Resource management capability at organisational, project and task level
- Risk and issue management processes
- Work management for individual resources to see their own assignments across multiple projects.
- Collaboration facilities.
- Centralised project information storage and retrieval.

Through their recent acquisition of EPK Group, EPMLive – WorkEngine have expanded their offering to include enhanced Portfolio Management and Analytics and enhanced Resource Management capabilities.

## Licensing and Cost

One of the main advantages of a SharePoint PPM tool is the lower licensing and implementation costs than some of the more advanced offerings.

Indicative costs at the time of writing this paper place the implementation costs of a typical SharePoint PPM product at approximately 10-20% of the leading tools and a much quicker implementation timeframe. Considering they may bring 80% of the functionality of a leading product, if the tool meets the organisations requirements they can be very cost effective.

## Mid Tier Competitor Products

There are a number of other mid-tier PPM providers, prominent amongst those being AtTask and Daptiv as well as a range of products not shown on the quadrant including Bijingo. All of which offer worthy solutions, similar delivery models (SaaS and local install) and a sound value proposition.

## Conclusion

The PPM marketplace continues to develop and become more competitive. Organisational maturity is continuing to develop and expectations of toolset capability are increasing. We have witnessed SharePoint PPM providers bringing a unique advantage in their ability to leverage existing applications and infrastructure to provide cost effective enterprise solutions.

They provide significant capability and are a realistic option for many small and medium size organisations as well as individual business units within larger companies.

We predict increased growth and penetration of SharePoint into the collaboration market and certainly Microsoft will be investing heavily over the next few years. SharePoint PPM vendors will be able to increasingly leverage this SharePoint functionality to provide innovations in PPM toolsets that challenge the current leaders and will potentially challenge Microsoft's own Project Server Marketplace.

Organisations considering PPM solutions should not discount SharePoint based PPM solutions from consideration as they may in fact offer a great value proposition.

### References:

Gartner: *Magic Quadrant for IT Project and Portfolio Management*. June 2010.

[www.gartner.com](http://www.gartner.com)

EPM Live: [www.workengine.com](http://www.workengine.com)

AtTask: [www.attask.com](http://www.attask.com)