

PRECURSIVE TOOLKIT.

HOW TO BUILD REPEATABLE PROJECT
MANAGEMENT SUCCESS

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PLAN. TRACK. FORECAST.



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PRECURSIVE **TOOLKIT.**

- 01.** HOW TO BUILD REPEATABLE PROJECT MANAGEMENT SUCCESS
- 02.** PRESALES PLAYBOOKS
- 03.** OUTCOMES & VALUE
- 04.** THE KICK-OFF
- 05.** GOVERNANCE LIKE A BOSS
- 06.** SHARING YOUR SUCCESS PLAN
- 07.** BUILDING A REPEATABLE PROCESS

STEPS FOR PROJECT MANAGEMENT SUCCESS.



WHAT TO DO.	WHAT IS IT?
Pre-sales Playbook	Create a scalable and repeatable way to engage the project management community during pre-sales to ensure that you can mobilise the right project manager and associated project team.
Outcomes & Value	In the transition from sales to project management, your team should confirm how the customer describes the outcomes they want to achieve (clue - it should be in the business case!) and the value this will drive. Focus on how <i>they</i> articulate value and not just how you have defined this internally.
The Kick Off	This is the most important step in the onboarding process and your biggest opportunity to establish expectations and define what success looks like. Make sure that ALL key stakeholders attend this meeting including your exec sponsor, key mobilizers, customer project manager and the appropriate subject matter experts.
Governance like a Boss	To scale customer onboarding effectively, it is essential to define a repeatable process. This allows you to manage this process consistently and create a common language for your team to where each customer is in the process.
Communicate a Plan	A “Customer Plan” should focus on the key items for your client to work on and complete during the onboarding process, e.g. provide user details, fill out data templates, testing (UAT) or providing feedback on progress.
Build a Repeatable Process	To scale customer onboarding effectively, it is essential to define a repeatable process. This allows you to manage this process consistently and create a common language for your team to where each customer is in the process.

PRESALES **PLAYBOOK SUCCESS.**

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GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
<p><i>Preplanning for projects and giving your project management team advance notice of the work that is about to land is critical for enabling you to get on the front foot and start fast.</i></p> <p><i>Your project manager should be able to gain insight into the scope of work and any relevant information from the presales engagement with the customer.</i></p>	We have reviewed pre-sales conversations with the customer along with historical interactions.	<input type="checkbox"/>
	We have reviewed the statement of work (SOW) with the relevant assumptions and identified any key client dependencies.	<input type="checkbox"/>
	We have identified the best fit project manager based on capacity, skills and knowledge and relevant customer experience that could enable our PM to deliver a successful outcome.	<input type="checkbox"/>
	We have identified key business and technical requirements highlighted by the sales team.	<input type="checkbox"/>
	We have a clear understanding of customer expectations regarding the duration of the implementation.	<input type="checkbox"/>
	We know when the customer expects to be using our product or service and what the urgency drivers are.	<input type="checkbox"/>

OUTCOMES & VALUE.

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GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
<i>The best companies capture how the customer defines value and value realization during the sales process.</i>	We have reviewed pre-sales conversations with the customer along with historical interactions.	<input type="checkbox"/>
<i>The project manager should be able to playback to the customer their desired outcomes and the value that this will create if achieved.</i>	We can articulate how the customer defines value in their language, not ours!	<input type="checkbox"/>
<i>Aim to develop the mindset of your project management team to be rooted in customer value realization, not just being on time and on budget!</i>	We have a clear understanding of the customer's challenges and the outcomes they wish to achieve. <i>(This is ideally learned via an internal review between sales and project manager)</i>	<input type="checkbox"/>
	We have included the business outcomes slides from the sales proposal in our kickoff deck.	<input type="checkbox"/>
	We have identified dependencies that could block us from delivering the initial customer outcomes.	<input type="checkbox"/>
	We have analyzed the risk factors that could destroy the value in the customers eyes.	<input type="checkbox"/>

THE KICK-OFF.

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
<i>This is the critical meeting for the success of project.</i>	We have checked that the kick-off appointment has been accepted by ALL stakeholders.	<input type="checkbox"/>
<i>This session sets the whole tone for the rest of the implementation.</i>	We have shared an agenda and timings in advance of the kickoff (book an extra 30 minutes to give you wiggle room).	<input type="checkbox"/>
<i>The best companies set the right altitude for the session prior to the meeting and through the introduction.</i>	We have prioritised finding out who the internal champion is (this may differ from the internal champion for the sales team).	<input type="checkbox"/>
<i>The outcome of this session is a clear mutually agreed plan and path on how we will proceed.</i>	We make sure that the customer understands your team, roles and responsibilities and we have identified bottlenecks that we need to monitor.	<input type="checkbox"/>
	We have created an <i>executive summary</i> for the kick-off - this summary plays back the business case from the sales cycle, summarizes the value the customer wants to achieve through specific outcomes.	<input type="checkbox"/>
	We have confirmed and planned out next steps, including meetings, with that time required being booked out during the kick-off.	<input type="checkbox"/>

COMMUNICATE A **PLAN**.

GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
<i>Be aware that the activities that are important to your project plan are not always as relevant to the customer.</i>	We have created a summary of all key activities which the customer needs to participate in.	<input type="checkbox"/>
	We have mapped out which subject matter experts from the customer need to be engaged and when.	<input type="checkbox"/>
<i>Your customer will appreciate seeing a version of your plan that shows them the most important steps and dependencies for their team.</i>	We have created a “Customer Plan” which has been shared with the customer, this plan highlights key activities, dependencies, and milestones.	<input type="checkbox"/>
	We have told the customer how much time they will need to invest across the project and when this will happen.	<input type="checkbox"/>
<i>The biggest delays in project can be caused by the customer not knowing what they need to do and when.</i>	We have agreed a communications cadence with the customer including a weekly check-in and written communications summary.	<input type="checkbox"/>
	We have a portal or document storage facility where all project related documents and templates live.	<input type="checkbox"/>

GOVERNANCE LIKE A **BOSS**.

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GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
<i>The best companies track and measure how effectively they are performing towards key objectives.</i>	We provide a weekly status report which is light touch and includes progress against plan, any missed dependencies, risks & issues and budget status.	<input type="checkbox"/>
<i>Leading KPIs are predictors of an objective, e.g. predicted go-live date or project health.</i>	We are proactive in managing scope creep which can impact outcomes or dilute margins on fixed price delivery.	<input type="checkbox"/>
<i>Lagging KPIs are retrospective measure of the actual success and results of your project, e.g. duration, budget performance.</i>	We are prepared to support and drive change management and provide digital assets to enable our customer to drive change internally.	<input type="checkbox"/>
	We have an agreed interpretation of customer health during the implementation, e.g. Red, Amber, Green.	<input type="checkbox"/>
	We have pre-trained some key people who will be involved in UAT in order that they better understand our product and can drive more effective testing.	<input type="checkbox"/>
	We are aware of non-functional planning topics incl. having realistic times set aside for data migration/data loading, environment management during testing, training and communications re adoption.	<input type="checkbox"/>

BUILD-IN REPEATABLE PROCESS.

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GUIDANCE	BEST PRACTICE CHECKLIST	Y / N
<i>This process will include the activities that your team needs to do as well as tasks for customers across the process.</i>	We have mapped out the activities that contribute to the overall project management process.	<input type="checkbox"/>
<i>The best companies focus on having the minimum number of steps and the least amount of admin for both your team and your customer.</i>	We have allocated task and responsibilities to different team members based on skills or knowledge.	<input type="checkbox"/>
<i>This process will be scalable and allow you to manage a high volume of workload or multiple projects at the same time.</i>	We understand the amount of time it should take to complete each activity.	<input type="checkbox"/>
	We have forecast the capacity required for our team to deliver this work.	<input type="checkbox"/>
	We have highlighted dependencies between activities as well as key milestones for our customer.	<input type="checkbox"/>
	We have identified key risks and blockers that can derail this plan and made the customer aware of them.	<input type="checkbox"/>

HOW PRECURSIVE DOES **PROJECT MANAGEMENT.**

PLAN

Who is on what and where are blockers?

TRACK


Are we on track to deliver value on time?

FORECAST

What work is complete & how long is it taking?













PRECURSIVE

The screenshot displays the PRECURSIVE dashboard. At the top, the logo is on the left, and navigation links for Home, Community, and Onboarding are in the center. A Salesforce logo is in the top right. Below the navigation are buttons for Knowledge Base and Learn More. The main content area is divided into sections: My Tasks (6), My Projects, and a social feed. The My Tasks section shows a grid of task cards with status and assigned user (WG). The My Projects section shows a card for Pepsi Implementation with status and team. The social feed on the right has tabs for Post, Poll, and Question, a share button, and a list of recent posts.



PRECURSIVE Home Community Onboarding 

Knowledge Base Learn More


My Tasks (6)



 User Testing Status: Complete 	 Design Sign Off Status: Complete 	 Data Loading Status: Complete 
 End User Training Status: Open 	 Project Team Training Status: Open 	 Go Live Status: Open 


My Projects


 Pepsi Implementation Project Status: UAT Go Live: 01/02/2024 Project Team: 


Post Poll Question

Share an update... 

Sort by: Most Recent Search  

 **Brad Wesley**
I've completed the UAT.

 **WG Wade Garrett**
Excellent! Have you seen Roadhouse?



OPTIMIZING **DELIVERY.**

KICK-OFF CHECKLIST

- Set the right altitude with the attendees
- Recap the business case - don't ask the customer to repeat what they've already told you in sales
- Define roles & responsibilities for the project on both sides and walkthrough scope
- Agree delivery plan including key dependencies
- Focus on capturing how the customer defines value in their language and the key outcomes they wish to achieve
- Agree cadence of meetings e.g. daily stand-ups / weekly PM meeting

Partnering with Customer Success

Get clear agreement on what state the customer should be in when CS gets actively involved in working with the customer.

Customer Success will need to shadow certain elements of a PS engagement to understand what has been built and why.

Define how the customer defines value and whether that bar has shifted during the post sales implementation.

Educate the customer on resources available to them including support, training and agree the best ways to provide ongoing value to the customer.

HOW PRECURSIVE DOES **PROJECT MANAGEMENT.**

SHARE

Customers see what they need to do and when

FIND

Customers can search, edit and prioritize tasks

OUTCOME

Customers ask questions and mark work complete

The screenshot displays the PRECURSIVE web application interface. At the top, the logo 'PRECURSIVE' is on the left, and navigation links 'Home', 'Community', and 'Onboarding' are in the center. A 'salesforce' logo is in the top right. Below the navigation, there are two red buttons: 'Knowledge Base' and 'Learn More'. The main content area is divided into several sections:

- My Tasks (6):** A grid of six task cards. Each card has a colored square icon, a title, a status, and a user profile picture with initials 'WG'.
 - User Testing: Status: Complete
 - Design Sign Off: Status: Complete
 - Data Loading: Status: Complete
 - End User Training: Status: Open
 - Project Team Training: Status: Open
 - Go Live: Status: Open
- My Projects:** A single project card for 'Pepsi Implementation'. It shows 'Project Status: UAT', 'Go Live: 01/02/2024', and 'Project Team: WG'.
- Post/Question Section:** On the right, there are tabs for 'Post', 'Poll', and 'Question'. Below them is a text input field 'Share an update...', a red 'Share' button, a 'Sort by:' dropdown menu set to 'Most Recent', a search bar, and a 'Post' button. Below this is a light blue comment box containing two entries:
 - Brad Wesley: I've completed the UAT.
 - Wade Garrett: Excellent! Have you seen Roadhouse?
- Ask a Question:** A red button at the bottom right of the comment section.

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THE SERVICES DELIVERY CLOUD FOR SALESFORCE

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www.precursive.com