PRECURSIVE TOOLKIT. HOW TO BUILD REPEATABLE PROJECT MANAGEMENT SUCCESS

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PLAN, TRACK, FORECAST,

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PRECURSIVE **TOOLKIT.**

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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 Preplanning for projects and giving We have reviewed pre-sales conversations with the customer along with historical interactions. your project management team advance notice of the work that is about to land is critical for We have reviewed the statement of work (SOW) with the relevant assumptions and identified any key enabling you to get on the front client dependencies. foot and start fast. 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. Your project manager should be able to gain insight into the scope of work and any relevant We have identified key business and technical requirements highlighted by the sales team. information from the presales engagement with the customer. We have a clear understanding of customer expectations regarding the duration of the implementation. We know when the customer expects to be using our product or service and what the urgency drivers are.

OUTCOMES & VALUE.

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

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

COMMUNICATE A **PLAN.**

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

GOVERNANCE LIKE A BOSS.

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Y/N

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The best companies track and measure how effectively they are performing towards key objectives.

Leading KPIs are predictors of an objective, e.g. predicted go-live date or project health.

Lagging KPIs are retrospective measure of the actual success and results of your project, e.g. duration, budget performance.

BEST PRACTICE CHECKLIST

We provide a weekly status report which is light touch and includes progress against plan, any missed dependencies, risks & issues and budget status.

We are proactive in managing scope screep which can impact outcomes or dilute margins on fixed price delivery.

We are prepared to support and drive change management and provide digital assets to enable our customer to drive change internally.

We have an agreed interpretation of customer health during the implementation, e.g. Red, Amber, Green.

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.

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.

BUILD-IN **REPEATABLE PROCESS.**

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IDANCE	BEST PRACTICE CHECKLIST	Y/N
process will include the vities that your team needs to s well as tasks for customers	We have mapped out the activities that contribute to the overall project management process.	
oss the process.	We have allocated task and responsibilities to different team members based on skills or knowledge.	
best companies focus on ing the minimum number of s and the least amount of	We understand the amount of time it should take to complete each activity.	
in for both your team and r customer.	We have forecast the capacity required for our team to deliver this work.	
process will be scalable and w you to manage a high volume vorkload or multiple projects at	We have highlighted dependencies between activities as well as key milestones for our customer.	
same time.	We have identified key risks and blockers that can derail this plan and made the customer aware of them.	

HOW PRECURSIVE DOES PROJECT MANAGEMENT.

PLAN

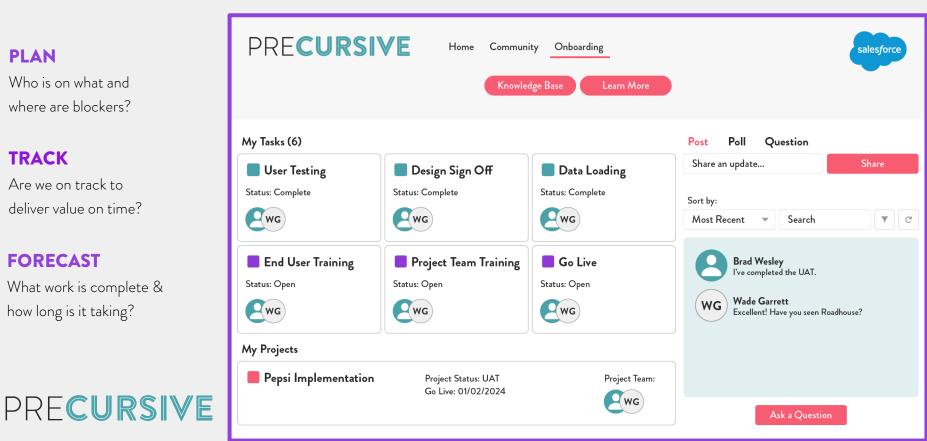
Who is on what and where are blockers?

TRACK

Are we on track to deliver value on time?

FORECAST

What work is complete & how long is it taking?



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

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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

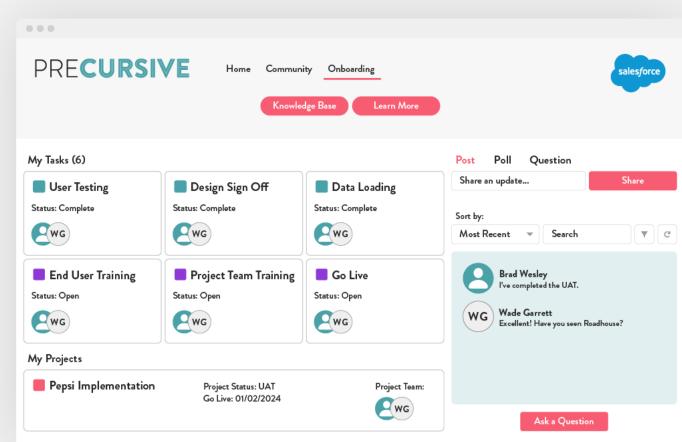
FIND

Customers see what they need to do and when

Customers can search, edit and prioritize tasks

OUTCOME

Customers ask questions and mark work complete



PRECURSIVE THE SERVICES DELIVERY CLOUD FOR SALESFORCE

PLAN. TRACK. FORECAST.

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