

How to Schedule, Track and Control an ERP Project

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“Setting a goal is not the main thing. It is deciding how you will go about achieving it and staying with that plan.”

—Tom Landry, Football Player and Coach

How do you implement a multi-million dollar Enterprise Resource Planning (ERP) project on-time and within budget?

1. Set a goal.
2. Plan what you need to do to reach that goal.
3. Work your plan.

While this answer may seem to be an oversimplification, those basic steps are the most critical components for a successful ERP implementation.

1. <i>Develop a project scope document.</i>	1. Set a goal.
2. <i>Identify tasks and create a project schedule.</i>	2. Plan what you need to do to reach that goal.
3. <i>Implement, track and control your project schedule.</i>	3. Work your plan.

Once you complete your project scope, developing a project schedule helps you identify the necessary tasks to reach your goal, assign a logical sequence to those tasks, monitor their execution, and provide progress reporting to your project team and key stakeholders¹.

Developing a project schedule requires time and effort, but a well-developed plan positions your implementation for completing activities on time and budget.

How Do You Create a Project Schedule?

A successful project schedule is built on a meaningful scope of work that has been identified and approved by the key project sponsors. The project schedule is simply the delivery of that project scope in a task-by-task outline.

The first decision to make is the method of scheduling. Small projects with few tasks can be tracked simply as a list of tasks and an estimate of how long each task will take to accomplish. ERP projects have hundreds of tasks (if not more) and one of the available commercial project management tools, such as Microsoft Project, should be used.

¹ Stakeholders are those people who are affected in any way by the project, either during the implementation or as a result of the project implementation.

Additionally, for ERP projects we recommend using the critical path method (CPM) for creating the schedule. The CPM requires that all tasks are linked via predecessor tasks (those that must be accomplished before the task can start) and successor tasks (those that follow the completion of the task). This linking creates one or more series of tasks that result in the longest total duration from project start to project finish. Tasks in this series are known as *critical path tasks*, and if any one is extended, the entire project timeline is extended. Thus critical path tasks must receive priority attention, with every effort made to prevent delays in their completion.

What Do You Include in a Project Schedule?

Everything. Everything, that is, that is needed to successfully implement your project. The schedule becomes the project road map; therefore, the following items should be considered for any ERP project schedule:

- **Tasks** – a list of activities that need to be completed including:
 - ♦ Functional tasks
 - ♦ Technical tasks
 - ♦ Administrative tasks
 - ♦ Testing tasks
 - ♦ Training tasks
- **Key Project Meetings** – the key communications and problem-solving opportunities including:
 - ♦ Core Project Team Status Meetings
 - ♦ Technical Team Meetings
 - ♦ Functional Team Meetings
 - ♦ Stakeholder Meetings
- **Critical Communications** – the key opportunities for communications to project stakeholders including:
 - ♦ Regular status updates
 - ♦ Information releases
 - ♦ Institution communication vehicles
 - ♦ Institutional training sessions

We recommend that a group of project stakeholders meet together to brainstorm a list of these major tasks, risks and dangers, questions to be answered, and assumptions to help develop this list. All of these items become candidates to be included in the project schedule, and the involvement of the stakeholders helps to create buy-in in the project schedule.

Once the list of tasks is completed, they are placed into an ordered sequence to create the project schedule. They can then be entered into project management software. When developing the final list of tasks, ensure all the entries are easy to understand by the project stakeholders. The Project Management Institute, “Draft Practice Standard for Scheduling” recommends the task descriptions start with a verb and contain a unique noun. If a task meaning is not intuitive or needs further explanation (maybe the user has not learned enough about the topic or module), you can use the notes feature of the software for a brief explanation.

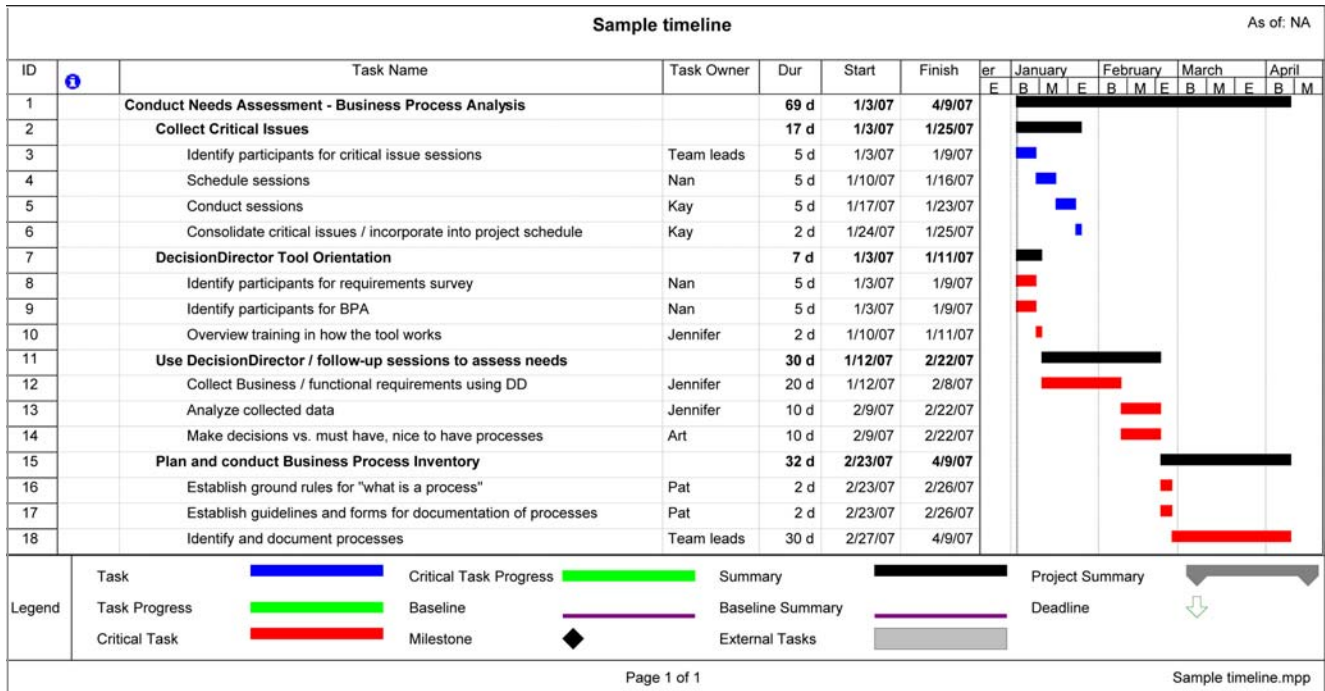
Each entry into the software is either a task or a summary task. Summary tasks require no action. They are updated automatically by updating the tasks that roll up to the summary level. The tasks below the summary tasks are where the tracking and controlling will take place.

Each task must:

- Be clearly understood
- Include the duration (length of time required for the task), preferably in days
- Predecessor(s) and successor(s)
- An assigned owner, also known as a resource

Figure 1 shows an excerpt from an ERP project schedule that includes tasks, summary tasks, task durations, task owners and a gantt chart.

Figure 1



Finally, project schedules need to be flexible. They are working plans, and rarely does the execution of a project take place as originally planned. Schedules that are inflexible create frustration with the team members and discourage use of the most critical tool for effective project management.

How Do You Track a Project?

Project Schedule Update Process

We recommend that you update your project schedule every week to effectively track and monitor your project. Establish a specific schedule to get updates from the tasks owners or the project team members. The first update or two of the project schedule will take a little longer to accomplish, and the process will become more routine as the project team members become familiar with the update process.

When the schedule has been updated, the project team members should receive a copy of the tasks that are due to be accomplished. This task list should include the following summary:

- Task(s) that are in progress
- New tasks that have been added

- Tasks that are due during the next three weeks
- All past due tasks

An example of a weekly dashboard report of task progress on a Student ERP implementation is shown in *Figure 2* on the next page. This is a summary report that shows progress on task starts and task completions for each of the project teams (recruitment, admissions, registration, financial aid, etc.), plus a nineteen week history of task progress.

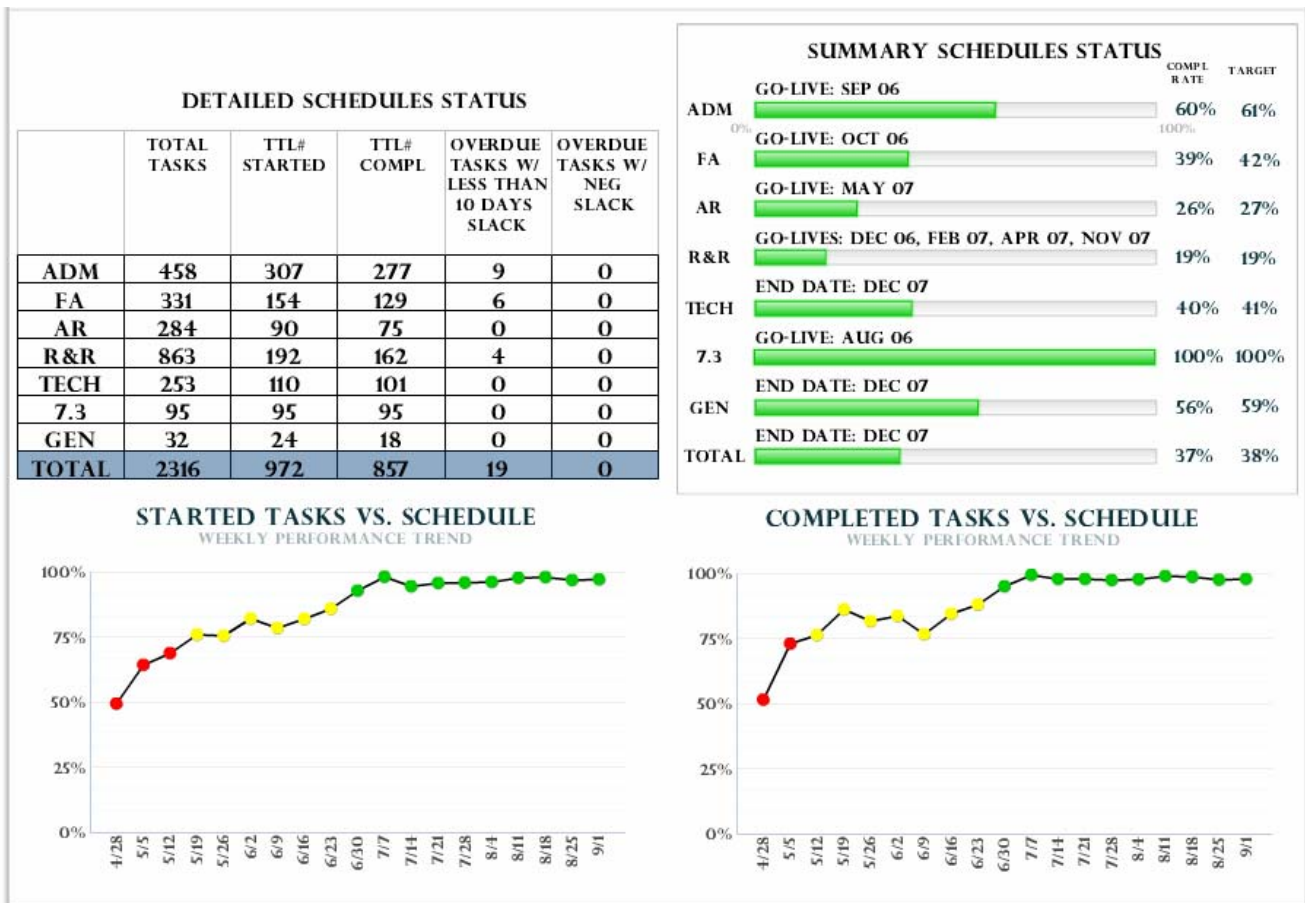
Task Risk Assessment Process

Tasks that are overdue should be addressed immediately by the project manager and the task owners to identify and mitigate any risks. Stakeholders and the team leadership must understand they are expected to accomplish their tasks on time or early. They must also understand the impact of late tasks on the overall schedule.

Regardless of the cause of overdue tasks, the project manager and team members must address the impact of any delays in task completion. Over time, tasks that continue to come in behind schedule add significant cost to the project. Following are items that commonly put task completion at risk:

- Task owners that have not bought into the project or do not have the skills to complete the task.
- Stakeholders that are hands off and not proactive.
- Back order of hardware or equipment.
- Resignation or loss of a critical resource.
- Temporary reassignment of project resources.
- Poor expectations.
- Lack of ownership for the task.
- Illness or foul weather.
- Loss of connectivity to instances/document storage.
- Malicious virus or Trojan horse.
- Poor issue tracking and resolution.

Figure 2



How Do You Control A Project?

Once the project schedule is created and the project schedule is being tracked and updated, the most challenging job of managing an ERP project is controlling the project. The purpose of schedule control is to take measures to eliminate schedule delay and ensuring tasks are on time. Controlling the project schedule includes several components:

■ Control Changes

- ♦ Control begins by recognizing that most projects do not go as planned. To prevent the project from falling behind, you must define a process for continued control and monitoring of needs – and begin implementing the process at the start of the project.
- ♦ Controlling project variances begins with keeping your project schedule accurate, detailed, and on task. Continuously refer to the statement of work or scope document help eliminate scope creep (uncontrolled changes in a project).
- ♦ Use a predetermined process of change control and approval to add to or redefine the scope of the project.

■ Observe Performance

- ♦ Once a control process is in place, the project manager and stakeholders must then balance between being too aggressively involved or too hands off. Task owners need a reasonable amount of time to complete their tasks. They appreciate follow-up but not constant observation.
- ♦ During the control phase the project manager must be fully and actively engaged. Human behavior plays a very large role in controlling the project schedule as it relate to timely task completion. The project manager must have a keen awareness of what is happening (or not happening) with the project and must be alert to possible risks.

■ Follow Up, Follow Up, and Follow Up

- ♦ Routinely update the schedule. If a participant is not available during a normally scheduled update session, arrangements should be made to get the update earlier so that information can be shared with the rest of the project team and stakeholders.
- ♦ A tried and true management theory still works -- *management by walking around*. Stakeholders, team leaders and the project manager cannot control a project strictly from their offices. To effectively control a project, the project manager and key team leaders must get to know the task owners in their environments and gain understanding of the effort involved in the task implementation.

■ Develop and Implement a Reporting Strategy:

- ♦ Develop a reporting strategy beyond the updating of the project schedule.
- ♦ Status reports should include topics such as issue identification, issue resolution, decisions, or upcoming events.
- ♦ Status reports should routinely be distributed to stakeholders, team leaders and team members and other resource management. We recommend weekly written status reports.
- ♦ Consider additional updates various interest groups such as Steering Teams, Boards of Trustees, Faculty Senates, or Department Heads. These updates should be customized to the audience.

How do you implement a multi-million dollar Enterprise Resource Planning project on-time and within budget? You set a clear goal through your scope development. You plan the tasks that you need to accomplish to reach that goal and build a project schedule. And you implement, track, and control your project schedule.

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