

# DESIGNING A WINNING PROJECT PLAN



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**WAYS OF WORKING**

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**EACH SESSION  
IS RECORDED**



**YOU WILL  
RECEIVE A LINK  
TO SLIDES AND  
THE RECORDING**

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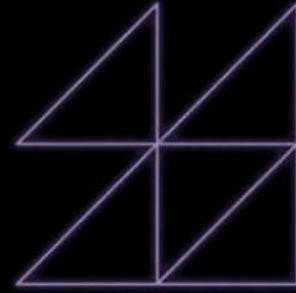
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# Designing a Winning Project Plan

*Giving your organization a leg up  
when pursuing new business*

# Responding To and Winning New Business



When competing for new business, *the design of your project matters.*



Your project design *can differentiate* your company's proposal from your competitors.



*Creativity matters* as you figure out how to perform a scope of work.

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“ *Your project design must satisfy the customer's key business factors and operations concerns to win.* ”

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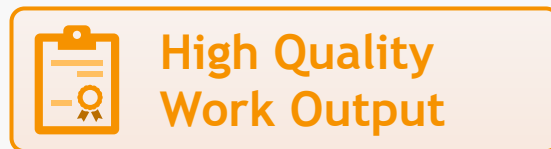
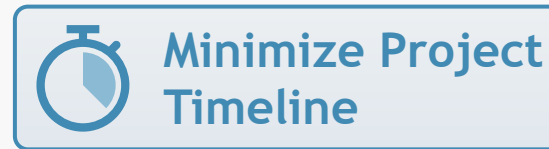
# What The Customer Want?

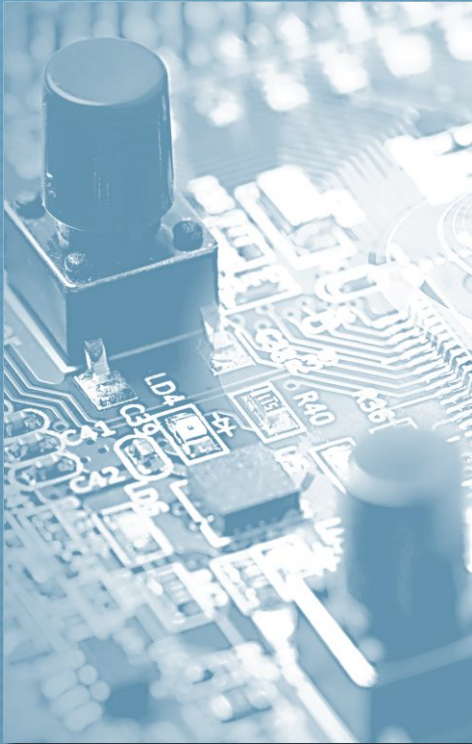


- When seeking to meet a business need, the customer will often publish a Request for Proposal (RFP). The RFP usually contains a detailed scope of the work required and clearly defined outcomes.
- If you or someone in your company has a strong relationship with a customer, they may invite you to a workshop to scope out the project together. This can lead to a sole-sourcing situation.
- Regardless of the engagement model, a successful Project Manager needs to leverage members of their team, who are experienced in performing the work, to build the project plan.

# Meeting the Customer's Needs

The plan you build must align with the customer's key business drivers:





- A major U.S. retailer invited our company to bid on an RFP to refresh the point-of-sale equipment (cash register and credit card pin-pad) and a specialty server in more than 7,000 stores.
- Our company was competing for the installation services against the 2 major, 3-letter-acronym IT Services Providers in this space.
- The 2 major IT Services Providers were also Original Equipment Manufacturers (OEMs), competing to sell the retailer the new hardware for the project.

## Case Study - A Technology Refresh Project



# Case Study - Background

Competitor Fails  
to Deliver

A year earlier, the customer had selected the lowest price IT services provider. However, the pilot conversions went so poorly the customer suspended the project and ended the engagement.

Understanding  
Dissatisfaction

The customer shared the issues they faced with the failed effort, These included poor quality and failure to complete the work in a timely manner.

Seizing the  
Opportunity

Leveraging their lessons learned, the customer was now re-bidding the project as they needed to replace their very old and failing hardware base.

# Case Study - Customer Requirements

## The Customer's Specs

- Complete All 7,000 Stores in 12-15 Months.
- Stores would not close during the refresh - work must be completed in the evening after closing.
- All stores have at least 3 point-of-sale stations and may have up to 7 for larger stores.
- The specialty server being replaced cannot be taken down until after close.
- All new equipment had to arrive on the day before the scheduled store refresh.
- Old equipment had to be removed, wiped clean of any data, and disposed of via reputable recyclers.

## Building Trust

Given the nature of the customer's business, there was one additional requirement that proved to be unique and challenging.

“ *All server hard drives must be removed and tracked with a chain-of-custody process, with the IT Services Provider issuing Certificates of Destruction for the hard drives.* ”

# The Solution: Planning



We decided to set up a survey process to catalog all the equipment at each site across the customer's footprint.

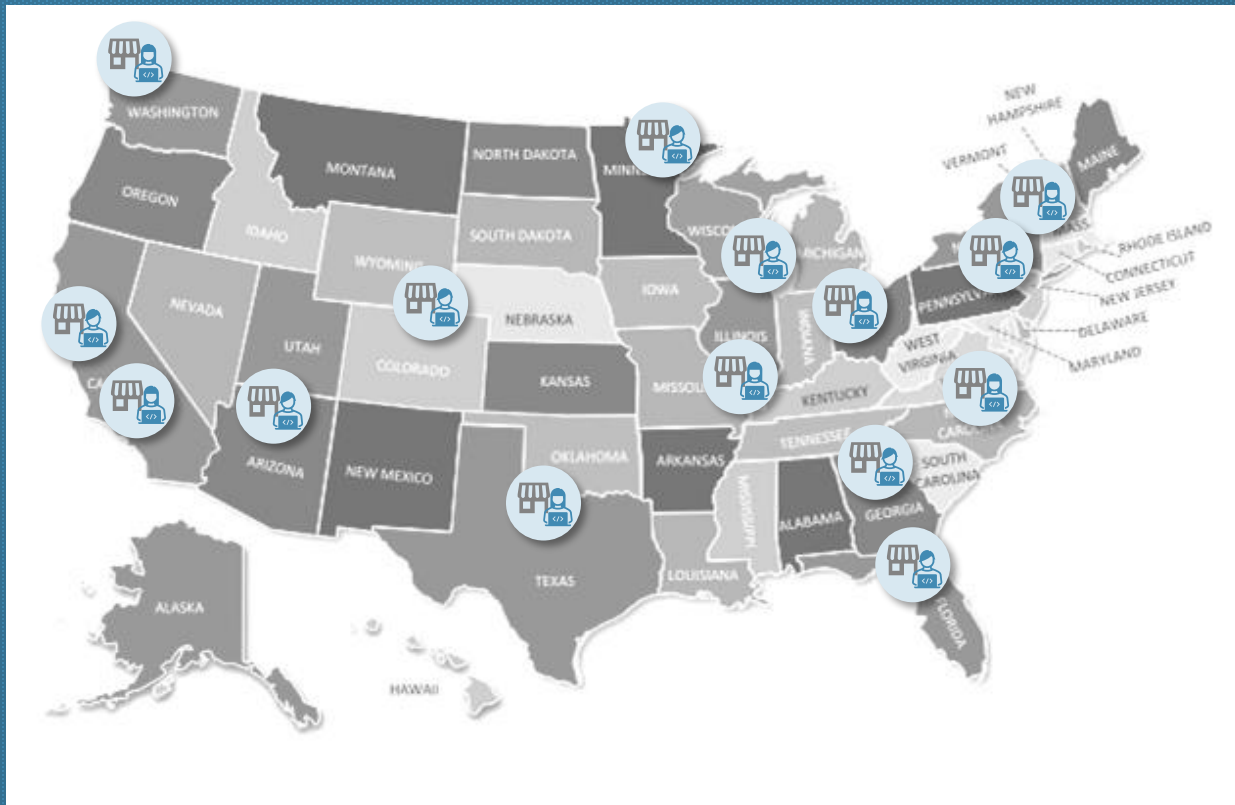


We would have a resource visit each store and gather asset information, took pictures, and created a basic store map.



A team of engineers would use the survey data to create a Bill Of Materials (BOM) describing the type and quantity of new equipment needed at each store.

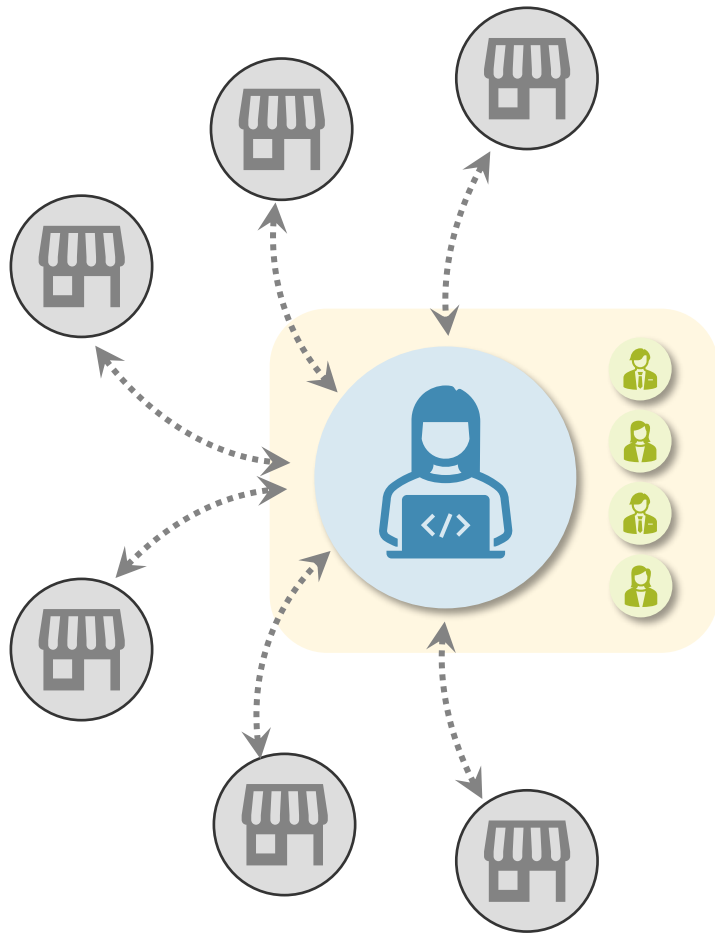
*The BOM enabled us to configure hardware for each site at our U.S. Configuration Center, then ship it to the stores as needed.*



- The learning curve was a real problem for the customer's previous failed conversion project.
- We decided we would build a team of 35 dedicated lead engineers, hired as full-time employees, to perform the 7,000 store refreshes.
- Two SMEs managed the lead engineers' tool kits, making sure they had everything they needed to successfully complete the work.

## The Solution: Quality

# The Solution: Cost Control



- We said we would hire the lead engineers in locations through-out the U.S. to minimize travel costs - most lead engineers got to drive home each night as they performed store conversions regionally.
- We decided to supplement the lead engineers with lower-cost, locally-acquired temp resources to keep labor costs down. We would incur no travel costs for these temps.

# The Solution: Risk Mitigation

## Scheduling for the Unknown



- Our solution involved scheduling for refresh up to 30 stores each night from Monday through Thursday.
- We could then use Friday to resolve any individual equipment issues from during the week.

## Other Quality Considerations

We told the customer we would not disassemble the old equipment until their replacement were up and running successfully.

We would have the customer provide spare, pre-configured hardware for distribution in case of failure.

We would leverage the customer's field support team to address customer-specific software or network issues.

# The Solution: Governance



## Setting the Tone

- We told the customer we would reassign one of our regional Sr. Service Delivery VPs to run this project full-time.
- The VP would also have a dedicated Sr. Program Manager and 2 Service Delivery Managers to manage the engineers and processes.



## Creating Accessibility

We requested a space *on-site at the client's HQ* to act as a command center for our our program leadership to provide real-time support and work through issues as we executed the nightly conversions.



- We found a 20,000 sq. ft. warehouse space we could acquire and configure for receiving and processing all the old equipment to be recycled.
- The space had a security system and cameras. We would add work benches with electrical outlets and network access to perform the disposal activities.
- Ultimately, we were able to separate metals, plastics, and electronics components to generate \$500K in revenue from recycling.

## The Solution: Disposal



# The Solution: Project Tracking

*“ These 2 major companies we are competing with are going to have significant software tools to manage this project. How are we going to compete with that? ”*

- Feedback from our Sales Rep



We ended up building our own web-based, real-time project tracking system.

For purposes of this presentation, lets call it **“BOB”**

# The Solution: Project Tracking



**BOB** would be built on a sequel server database with a web-based front end.

It was designed to run remotely on the lead engineers' laptops in the stores.

## **BOB handled all aspects of the work:**

- Lead engineer profiles.
- Store survey data collection.
- Store refresh schedule.
- New equipment shipment tracking.
- Specialty server hard drive chain of custody.
- Chat and photo sharing with the command center.
- Event logging for the store refresh workflow with progress alerts.
- Real-time reporting.

*The customer also received direct view access to the tool!*

# We Won!

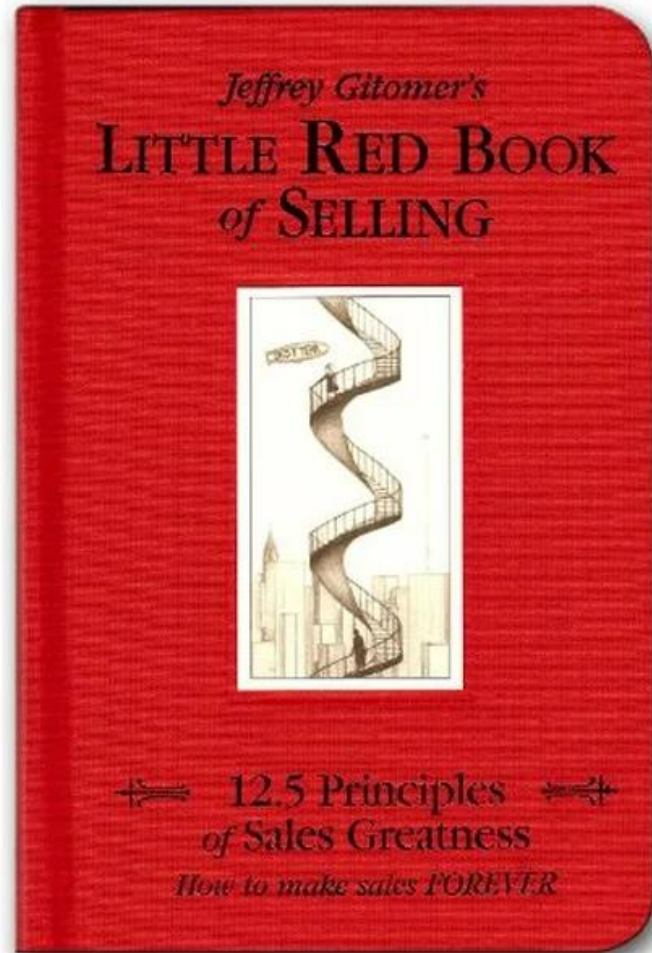
- We demoed BOB to the Customer during our final sales pitch.
- The Customer bought into all aspects of our solution and awarded us the contract.
- 15 months later, we completed the last store refresh without causing a single store to lose business.
- The customer was very pleased.
- To this day, this is the largest, most successful service project in our company's history.



- Be creative and think outside the box.
- Base your project on key business factors.
- Listen to the people who know best how to do the work.
- Take a commonsense approach.
- Be bold.
- *Win!*

Your Next Project Design

# Bonus Takeaway



“ *People do business with people they like and they trust.* ”

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- *So be a likeable person.*
- *Speak the truth.*
- *Deliver high-quality results.*



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# UP NEXT:

## TRACK 1: WAYS OF WORKING, RM 1410

FUTURE-PROOFING PROJECT MANAGEMENT:  
LEVERAGING VIRTUAL TEAMS, AI AND YOUR PM  
TOOLKIT FOR SUCCESS  
-CHANDA MONROE-WILLIAMS

## TRACK 2: AI FOR TODAY/TOMORROW, RM 3240

NEXT-GEN PM: INTEGRATING AI INTO YOUR PROJECT  
TOOLKIT  
-ANDY BURNS

## TRACK 3: PEOPLE, PROCESS, TECHNOLOGY, RM 3265

THE REVOLUTION OF PROJECT  
MANAGEMENT: AI, AGILITY, AND REMOTE  
COLLABORATION  
-LATOSHA WARD

## SUMMIT 2024 SURVEY



PDU ID: CO43SG77L8

PDU TYPE: POWER SKILLS

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