Smartsheet Integration Project

Project Goal

The goal of this integration project is for CLIENT to successfully adopt Smartsheet as its in-house project management and resource management tool. Success will be defined as the tool being deployed in the PDG software environment, meeting the defined Tool Requirements (see Appendix A), and being adopted and used consistently by CLIENT staff, particularly by the PMO and Build Teams with Phase 1 being completed by end of Q1 2023.

Project Scope

The Smartsheet Integration project will be separated into Phases. During Phase 1, the goal is to conduct the initial integration with a core set of features, pilot test, and roll out the platform to the company. Phases 2 and 3 will involve adoption of additional features as well as reinforcement training.

Phase 1

Phase 1 is the largest phase of the project, involving initiation and planning, requirements gathering, configuration, pilot testing, communications, training, and launch.

Initiation, Planning, and Requirements Gathering

During this task, CLIENT will identify all key requirements for the project, segregating those requirements into Phases for the project based upon criticality of need. CLIENT will meet with Smartsheet to determine the feasibility of the project and identify the level of effort and cost associated with the configuration of the platform as well as licenses.

CLIENT will create a project plan and timeline and establish stakeholders and project goals during this phase, as well as assigning resources to manage the project, pilot test, and develop supporting training.

CLIENT will also meet with Projector during this phase to determine the approach for integrating Smartsheet and Projector functionality.

Communications

During this task, the project team will communicate information about the project to the impacted audience of users, including Engagement Managers, IDs, Media and Development Team, and other stakeholders.

The project team will create a Communications Plan identifying key messages, timeline for deployment, and communication modalities. It is expected that there will be a pre-launch phase of communications to raise awareness and generate interest, a launch phase of communications that will include training materials, and a post-launch phase to reinforce behaviors and provide performance support.

The project team will create and deploy all communications internally. This is likely to include:

- Formal announcement of the initiative at the company meeting in January 2023
- Email newsletters promoting features of the platform or making announcements
- Teams announcements of key milestones

Configuration

The Project Team will work with Smartsheet to define requirements and determine the cost for configuration and support.

Smartsheet will implement the software according to the requirements defined for Phase 1. The project team will test functionality and provide feedback. Smartsheet will adjust until all requirements are met.

During this task, Smartsheet and the Project Team will also work with Projector to configure the integration between the two platforms in CLIENT's environment.

Pilot Test

During this task, an EM will Pilot Test the use of Smartsheet on one project. It is expected that this Pilot Test will last approximately one month and will be a smaller project in scope. Each week, the EM will meet with the Project Team to debrief, identifying additional needs, issues with functionality, and knowledge gaps.

After four weeks, the Project Team will meet for a *Pilot Test Debrief* to review information gathered during the Pilot Test and identify additional functionality needs, knowledge gaps, and configuration issues. Smartsheet will address any configuration-related functionality issues. For new requirements identified, the Project Team will prioritize them in Phase 2 and Phase 3. Identified knowledge gaps will be used to create additional training and performance support materials.

Training

During this task, the Project Team will create training materials and deploy training to users in the organization. Training will be created for three user types:

Director/Admin: These users will have full functionality of the system and will have all account-level access and views across all projects as well as the ability to create templates.

Project Manager: These users will have the ability to create projects and tasks, assign resources, etc.

Team Members: These users will be restricted to being able to view projects and update status on tasks on which they are assigned.

The Project Team will identify learning needs for each audience and develop a training plan designed to meet the needs of each audience. It is anticipated that for each audience we will conduct one or more virtual system demos and training session that will be recorded. Some of these may be facilitated by Smartsheet.

Additionally, the Project Team will leverage existing Smartsheet performance support materials where available. Where gaps exist or where additional PDG-specific info is needed, the Project Team will develop performance support materials including job aids and recorded demos.

Key to this training is establishing behavioral expectations on use of the tool as well as knowledge on how to use the tool

Project Launch

During this task, the Project Team will launch the use of the platform to the company. This will be broken into three stages:

Pre-launch: which will include deployment of training materials and communications, as well as final testing and configuration of the platform.

Launch: where users will begin using the platform to manage projects

Post-launch: where the Project Team will provide performance support and collect feedback on the launch. During Post-launch, the Project Team will send out regular communications and will establish daily "office hours" during the first two weeks of launch where users can join a virtual meeting space and ask questions or get help with the platform.

Project team leads will attend team huddles/internal team meetings to review how the tool is being used with the team. Project team leads will review Smartsheets to evaluate how they are being used.

Phase 1 Evaluation

During this task, the Project Team will meet to review feedback on the launch. The team will look at feedback provided by team members and EMs, as well as overall adoption and use of the platform. The Project Team will evaluate all feedback to determine if and how to address feedback, whether with additional training support or communications are required, and what additional features or changes to the platform are required. The Project Team will then prioritize those subsequent activities to Phase 2 or Phase 3 of the project.

Phase 2

Additional features to be implemented along with additional training and performance support as needed. Further details TBD.

Phase 3

Additional features to be implemented along with additional training and performance support as needed. Further details TBD.

Stakeholders

Name	Role
[STAKEHOLDER NAME]	Project Owner, budgetary decision-maker
[STAKEHOLDER NAME]	PMO director, critical stakeholder for requirements gathering (representing EMs), decision-maker for all EM-related functionality

[STAKEHOLDER NAME]	Critical stakeholder for requirements gathering (representing SA/ID team), decision-maker for resource management functionality
[STAKEHOLDER NAME]	Critical stakeholder for requirements gathering (representing media/development team), decision-maker for resource management functionality
[STAKEHOLDER NAME]	Critical stakeholder for requirements gathering, decision-maker for all operations-related functionality and Projector integration
[STAKEHOLDER NAME]	Critical stakeholder for requirements gathering, decision-maker for all technical configuration requirements
[STAKEHOLDER NAME]	Project Manager
[STAKEHOLDER NAME]	Critical stakeholder for requirements gathering (representing solution architects/consultants), decision-maker for resource management functionality
[STAKEHOLDER NAME]	Pilot Testing EM
[STAKEHOLDER NAME]	Internal SMEs
Engagement Managers	Impacted audience – key users
SA/ID Team	Impacted audience – users
Graphics/Media Team	Impacted audience – users

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	Responsible	Accountable	Supporting	Consulted	Informed	
[STAKEHOLDER]		X		X		Overall accountability
[STAKEHOLDER]			X	X		
[STAKEHOLDER]			X	X		
[STAKEHOLDER]			X	X		
[STAKEHOLDER]		X		X		Operational accountability/ Projector
[STAKEHOLDER]		X		X		Technical accountability
[STAKEHOLDER]	X					
[STAKEHOLDER]					X	
[STAKEHOLDER]			o		X	May “support” to develop training materials/comms
[STAKEHOLDER]			o		X	May “support” to develop training materials/comms
[STAKEHOLDER]			X			
[STAKEHOLDER]	X					

Appendix A: Tool Requirements

Phase 1 Requirements

- Integrates within the existing CLIENT software environment (Projector, Teams, etc)
    - Consolidates project resource data for manual or automatic transfer to Projector
    - Roles (named and unnamed), and hours
    - Resource view that shows overbooking/underbooking for each resource across the organization (can be in projector or smartsheet)
- Easy to use / low ramp-up time for contractors
- High degree of usability – easy to create tasks and update project plans in real time
- Includes fully functional project management features including task and subtask creation, scheduling dependencies, GANTT chart, scheduled nonworking time (weekends/holidays), automatic updating of schedule when dates change, etc.
- Ability to baseline projects and evaluate project health compared to baseline
- Includes multiple views, including “board” view and calendar view, without duplicative work by the PM
- Allows non-PMs to view project and task details, particularly in board or calendar views
- Allows a PM to assign a resource to a task and set a number of labor hours for that task-resource
- Sends alerts to users assigned to tasks
- User view that shows individual task assignments across projects

Phase 2 Requirements

- Can create custom project templates, including templated resource assignments
- Ability to create project-level dashboards and account-level rollups
- Can create client-view dashboards (maybe phase 3)
- Replaces the QC log (automated QC intake form)