PROJECT *Timesaver*™ for Interaction Process Automation™

Integrated Communications-based Business Process Automation Templates

Based on the Project Management Body of Knowledge (PMBOK Guide®) 4th Edition

Project Management Institute (PMI)

Ask any Project Management Professional what is the most important aspect of a successful project and it is universally agreed that it is all about *communications*. Yet, in today's world most project communications rely on basic voice and email, without any way to monitor the assigned tasks. Even sophisticated tools such as Microsoft® Project only provide views of resources, assignments, and deliverables without providing the Project Manager any ability to *push* tasks to the appropriate team member and be alerted of their progress. So, here is where Communications-based Process Automation comes in:

PROJECT *Timesaver*™ (PTS) for Interactive Intelligence's Interaction Process Automation™ (IPA) Solution:

- Captures, prioritizes, routes, escalates, and tracks work with stakeholders and project team members
- Orchestrates business processes and communications, bridging the gap between the project manager, people, and systems utilizing proven Unified Communications-enabled (UC-enabled) Contact Center technologies and routing engines.
- Can integrate to enterprise applications and extend process automation to various database sources and applications

Although this IPA template is based on the PMBOK Guide®, user organizations can use it without the need for a certified Project Management Professional (PMP), or to follow the entire set of processes within the respective knowledge areas of the PMBOK Guide®.

Application

The PMBOK Guide® is a standard for managing most projects most of the time across many types of industries. This standard describes the project management processes, and tools and techniques to manage a project toward a successful outcome.

Not all stakeholders need to be part of IPA or have a license, since communications such as emails can also be managed within PROJECT Timesaver™.

Project Management is the core area for initial PROJECT *Timesaver*™ IPA template developments, although there are interrelationships with Program and Portfolio Management. According to the PMBOK Guide®, "A project is a temporary endeavor undertaken to create a unique product, service or result". So although projects by their nature have a beginning and an end, timeframes could be from weeks to years to complete.

Role of Project Manager

The project manager is the person assigned by the performing organization to achieve the project objectives. ***The project manager is the lead person responsible for communicating with all stakeholders, particularly the project sponsor and project team as well as other individuals and groups.*** The Project Manager occupies the center of the interactions between stakeholders and the project itself. These tie into the key Project Management Process Groups and Knowledge Areas Mapping, and primarily the Project Communications Management Knowledge Area as defined in the PMBOK Guide®.

> PROJECT *Timesaver™ for IPA* can communicate any or all of the communications-related processes and tasks throughout the entire duration of the project.

Project Management Knowledge Areas and Process Groups

PROJECT *Timesaver™* for IPA *divides all processes into 3 groups:*

- The **Initialize *Project Tasks*** for tasks and documents in the beginning of project planning. These could be within PROJECT *Timesaver™* for IPA essentially with queues being set up for document exchange. Or accomplished outside of PROJECT *Timesaver™* for IPA, such as via email or other notification methods. The Project Manager can determine which queues are needed for sponsors, stakeholders, and project team members.

- The ***Primary Project Tasks*** group includes core Project Management functions designed to fully leverage PROJECT *Timesaver™* for IPA.

- The *Other Project Tasks* group includes internal and external communications that are for processes that could fully be implemented with PTS and / or extended via notifications and links to access information and documents.

An example of the '*Other Project Tasks'* group would be to Conduct Procurements via internal Asset Management or Procurement teams who may or may not use PROJECT *Timesaver™* for IPA with optional external communications to suppliers that are not on PROJECT *Timesaver™* for IPA, but could be notified through email to mobile clients.

Key features of PROJECT *Timesaver™* for IPA include:

- Ability to manage one or more individual projects simultaneously
- Processes and associated tasks and documentation can be re-opened to allow for revisions and updates
- Sponsors and approvers can be incorporated using email, so they do not necessarily require a seat license.
- Any or all processes can be used in a variety of sequences and coordinated in a way that gives the Project Manager the ability to orchestrate processes based on organizational process assets, enterprise environmental factors and the unique requirements of each project.

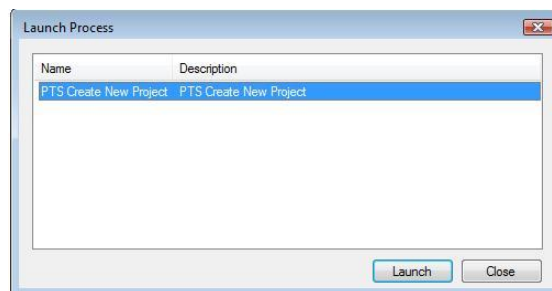# PROJECT *Timesaver™* for Interaction Process Automation™

- The Project Manger does not have to be a certified Project Management Professional (PMP) or even versed in the PMBOK Guide® to fully leverage PTS regardless of the breadth and complexity of the project.
- Detail and Summary reports on Project Tasks and their status can be easily retrieved through Interaction Center Business Manager's Historical Reports Workspace, or delivered on a schedule using Interactive Intelligence's Scheduled Reports product.

The following provide a basic guide to understanding its operation:

Launching a project is easy. A Project Manager can just open up the Interaction Client, and select Processes at the top to begin:
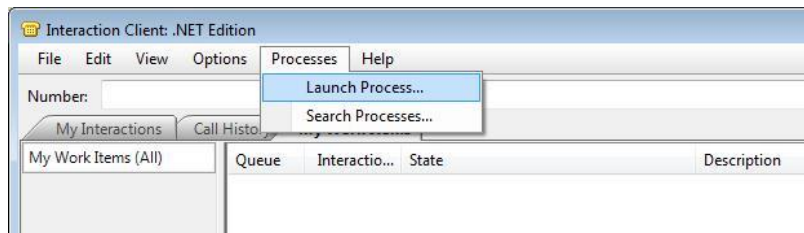
Click on Launch Processes and the following Project Details screen opens up:

Select PTS Create New Project and click the Launch button. The following screen opens up:
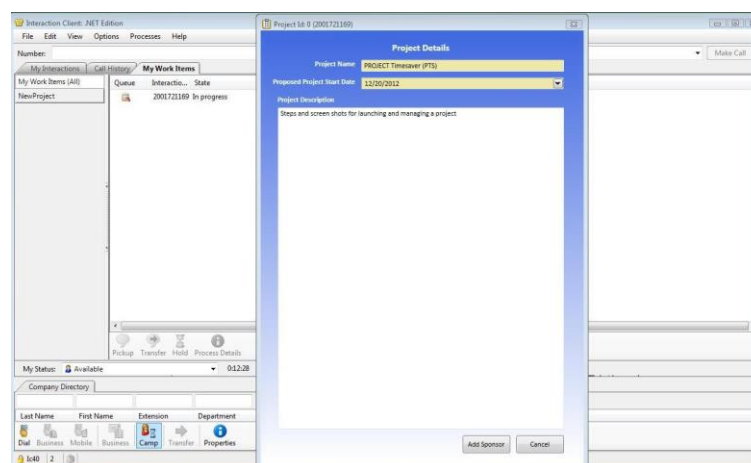
Click Add Sponsor and fill in the Project Contact Details:

Click OK after the above screen is filled in and a New Work Item will be sent to the Project Manager via a pop-up as shown below:

Clicking Pickup on the pop-up above or via the Interaction Client will take you to the top-level Project Management screen:

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All Project Tasks are divided among the 3 main groups above and cover all processes and associated tasks which correlate with the key Project Management Process Groups and Knowledge Areas Mapping as defined in the PMBOK Guide®. For the tasks associated with all process, PROJECT *Timesaver*™ for IPA provides links to document templates designed for each process. Document options include selecting from pre-designed templates available from 3rd party sources, or the Project Manager can use appropriate documents available from the organization's Project Management Office (PMO).

In addition there are key communications functions, including creating and managing communications groups; managing project teams; creating and assigning tasks; distributing information; and reporting performance.

Using IC Business Manager with IPA Monitor, the Project Manager can monitor the status of open tasks, view percent complete, and even open the tasks and view the details:

Project Organization Example

```
Executive Sponsors
&
Steering Committee
```
```
Project Manager
```
```
Project
Management
Office
(PMO)
```
```
Stakeholders    Team 1    Team 2    Team 3…
```

With PROJECT *Timesaver*™ for IPA, the Project Manager will have the ability to re-assign tasks or **Work Packages**, which are project work components. In PROJECT *Timesaver*™ for IPA, they are referred to as **"Work Items"**. These are documents and forms that are automatically routed to the appropriate team member which can be based on skill routing technology as used in contact centers. Work items can also contain other dynamic capabilities, such as the ability to contain updated information in real-time through Web services, to other attributes, such as restricting certain data from being viewed by specific project team members or groups.

The Project Manager can even use a Work Item in a process to identify and build the team register by using PROJECT *Timesaver*™ for IPA to distribute Work Items to steering committee members, department heads, heads of function, and human resource personnel in order to compile the team register and communications directory information for the identifying stakeholders and team members.

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