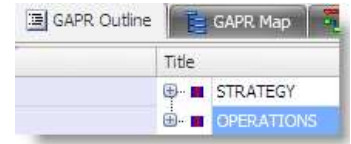


## Configuring ManagePro to Work with Your Business Needs #1 of 2 - 6 Steps to Set up Operations

This article is one of a two part series in setting up ManagePro to represent your business processes. It assumes that you will be building the GAPR Outline view in ManagePro around two primary line item headings, Strategic and Operations. Setting up your Strategic Plan is covered in the second article in the series. Performance Solutions Technology offers configuration services if you find that you're not the "do it yourself type".



### Step 1 of 6 – Frame a house

The first step in laying out your business in ManagePro is to imagine you are framing a house. In this first step, we just want to frame out where the basic rooms go. OK, so what do I mean by basic rooms. Contractors call this roughing it in, and I want you to operate in the same way. It doesn't have to be perfect, just a basic framework to operate from. Ask yourself, "What will make the most sense to the people using the database? How will it reflect the departments, the transactions currently in place?"

Organize by department?  
By region... by projects?  
What should I include?  
Where do I start?



For those of you setting up ManagePro for a business, 90% of the time framing your basic rooms means keying in your business groups and business deliverables as sub-headings under the heading of Operations. Choose Heading when entering these records. For those of you using ManagePro individually, your basic rooms will be best represented by your key deliverables, objectives and/or goals.

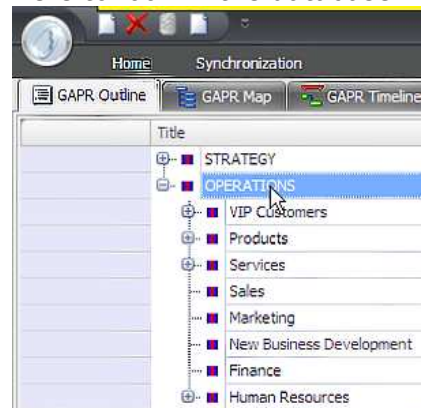
#### Important Note:

Do not treat Step 1 as an opportunity to create a new taxonomy or translation of your business processes into some higher order of concepts. Keep it simple.

Use the natural groupings that are already in existence. Imagine that you are creating rooms for people and you want to use familiar names for easy recognition. You want others to know immediately where to look in the database to find their stuff.

From a building perspective, we want you to call a kitchen just that, not a resource preparation and delivery center. Leave all that for later. Most of the time you want to have an indented outline that represents one or more of the following: business groups, products, services and customers.

Here's an example of organizing by departments. Note the departments are displayed as sub-headings underneath the heading of OPERATIONS, and indented or demoted one level.



Here's an example of what **not** to do. Don't mix goals, projects and tasks all at the same level of indentation.

**Tip:**

- Avoid mixing more than two types of groupings (e.g. don't mix departments, with projects, with tasks) on the same indentation level
- Avoid getting complex or thorough to the point of looking like you're designing a layout for the next library of congress. Simple is better, don't create multiple layers of organizing sub-headings at this point, it may be accurate but it is difficult to work with. Most people want to reach their primary areas to work in within three clicks (indentations)... not nine.

Goal and Objective Titles			
1	📄	📌	..... STRATEGY .....
8	📄	📌	..... OPERATIONS .....
9	📄	📌	Production Unit Goals
16	📄	📌	Project for Aleegan Company
21	📄	📌	Review compliance report
22	📄	📌	Sales
27	📄	📌	Evaluate staff resources per budget and
28	📄	📌	Evaluate staffing & results per strategic
29	📄	📌	Finance Projects & Processes
33	📄	📌	Management Information Systems

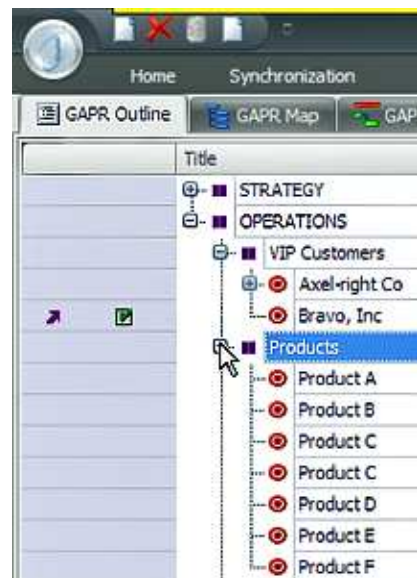


**Step 2 of 6 – Enter what's priority on the next indented level**

Underneath each business group and product/service grouping, we want you to enter all of the priority 1, "must deliver" objectives, products, customers.... selecting the type of record to be a goal.

Sometimes defining what's priority can be quite an eye-opener, but the good thing is that you can always change what's entered later, ManagePro is very flexible. Bottom line, complete step 2 by entering:

- the top projects and deliverables underneath each business group,
- the primary products and services underneath their respective category as applicable, and if you're like most business,
- the primary 20% of your customer base that generate 80% of your income.





### Step 3 of 6 – Projectize all objectives

At this point you want to move beyond managing by a list, as you view all the top priority objectives, goals or outcomes you've listed. You need to "projectize" each of those top objectives by building an action plan that represents at a minimum the top 3 to 6 initiatives or action steps it will take to accomplish that objective. Do Not leave your top objectives as simply a list.

If you're not use to building a project plan, think of starting with outlining an explicit, defensible series of steps to reach each objective. What you enter should reflect the critical steps, the ones that must be completed, if the objective is to be reached. Think of it as a plan you could hand off to someone else while you go on vacation. This will help your staff coordinate their effort to be consistent with organizational priorities and completing agreed upon action plans, while providing feedback on their results. Here are some suggestions:

- Identify and key in your top objectives or projects underneath each heading
- Complete the goal details section, defining both the scope of the project and also the biggest obstacles to be overcome, before you create the action plan
- Indent one level underneath each goal or project and build a 3 to 6 step brief action plan that emphasizes what's most critical for success.

Here's an example of what a department (Sales & Marketing) breakdown by key objectives and projects (Product Launch for Tille, MedAlert & Air Defense) might look like, with an action plan included under the project "Product Launch for Tille".

Goal and Objective Titles		Who
1	..... STRATEGY .....	WB
8	..... OPERATIONS .....	PR
9	Production Unit Goals	PR
16	Sales & Marketing	MN
17	Product Launch for Tille	MN
18	1. Confirm market segment triggers	MN
19	2. Confirm initial references at high satisfac	MN
20	3. Launch email and call center campaign	MN
21	MedAlert	WB;
22	Air Defense	MK



#### Step 4 of 6 – Use Tasks and To-dos for mini-projects & ad hoc requests

Sometimes, you don't need formal projects, and task management will be enough. For instance as you're tracking your primary customer, you may want to just indent and list the follow-up tasks you have outstanding or use to-dos attached to that record. In either case, go through the 3<sup>rd</sup> indentation and list the outstanding "tasks" as line items or records under which you haven't built/don't need a project.

Notice in the screen shot below, ad hoc tasks have been entered as either:

- Task line items/sub-records underneath the customer "Axel-right Co" or
- To-dos (function like "post-it notes") viewed in the Goal Related Details window for "Bravo Inc".

Both approaches offer their own advantage. Tasks add more capability for tracking progress updates, while to-dos provide less line items ("clutter") to the overall GAPR views.

Title	Who
STRATEGY	Admin*,
OPERATIONS	Admin*,
VIP Customers	Admin*,
Axel-right Co	Admin*,
Confirm market segment triggers (Task)	LisaR*,J...
Evaluate results and identify top 3 market differentiators (Task)	AhmedM*,
Deliver report on anticipated results in 90 days	CrisG*,
Bravo, Inc	Admin*,
Products	Admin*,
Services	Admin*,

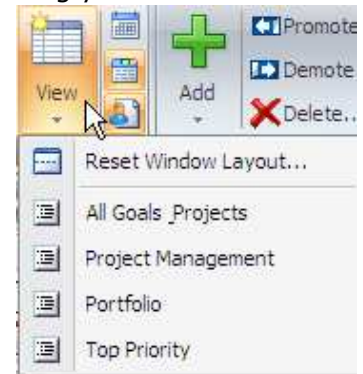
  

Title	Who	Due Date	Status
Check on auto responder site problem	JohnB*, JiS, Admin,		To Do
Complete Requirement spec on Donor managem...	LisaR*, Admin,		To Do
Contact Finance re: report format they need	Admin*,		To Do



## Step 5 of 6 – List the 5-10 business questions & construct views to match

ManagePro, by default, comes with predefined views, such as the view to display all records with a priority of 1. That view is designed to answer the business question of “What are all my top priorities or any other direct report’s top priorities?” based upon the selection in the User drop down menu. Your next step is configuring your business process in ManagePro is to get clear on what the top 5-10 questions are you need to ask from the data, as you’ll want to construct a custom view for each question. Once constructed, these views will be available underneath the View ribbon button. Let me explain.



All views are constructed using the GAPR right click option **View Configuration** and based upon two components:

1. Columns or fields displayed - There’s over 200 fields available in ManagePro, which ones will you need in this view?

2. Filters – Which GAPR records are included in the view is determined by filters embedded in each view using the View Configuration option. Records can be identified uniquely in all sorts of ways to create a basis for pulling them into a custom view. As an example, to only display one entire outline tree, try using the “RollDownText1” field and put a unique number or text at the parent goal to identify all the sub-records.

Although this is an advanced task, your top 5-10 business questions provide a very good platform against which to decide what basic fields you need to select and add to your database views. For most businesses, this will mean:

- Taking advantage of our pick-list fields to categorize records (ex. To categorize customers by region or size),
- Relabeling field titles using the Preferences/Customization option, and
- Creating calculated fields to display things like variance, earned value and more.

This is a big area, but for now use the following matrix to help you frame out your questions and ultimately the views you’ll need to create.

Business Question	Selected Fields	Filter (s) Required to only display needed records
Example #1 – What’s due in the next 30 days?	Title, Who, Start Date, Due Date, Status, % Complete	Filter: Due Date within the next 30 days; Status = Not Done
Example #2 – What’s the financial status on all our top current projects?	Title, Who, Start Date, Due Date, % Complete, Budget, Actual, Budget – Actual, Earned Value	Filter: Priority = 1, Status = Not Done

**Note:** Remember, the **View Configuration** option is available at the bottom of the GAPR right click menu, and is accessible only if you have Administrator access rights. See the Help file for more details. See PST for consulting help on your configuration.



## Step 6 of 6 – Add your people and assign access rights and objectives

Your database won't be complete without adding people using the People and Meetings tab. This step can be completed at any time; it doesn't have to be last. As you add each person be sure to take advantage of the right click options in this area to assign access rights and business group membership if rolling out ManagePro across a business group. You'll also want to enable logging into the database and set up initial passwords.

The screenshot shows the 'People & Meetings' tab in the ManagePro software. A table lists users with columns for Initials, First Name, Last Name, Employee Id, Email, and Phone. A context menu is open over the row for 'AhmedM', showing options like Refresh, Add..., Import, Export, Delete..., Edit Details..., Business Group..., User Access, and Time Card... The 'User Access' option is highlighted by the mouse cursor.

Initials	First Name	Last Name	Employee Id	Email	Phone
Admin	Default	Administrator	admin01		
AhmedM	Ahmed	Mura	1032	AMura@myemail...	888 555-444
CrisG	Cris			CGuglia@myemai...	888 555-4444
JIS	Ji			Jsingh@myemail...	888-555-4444
JohnB	John			JBrown@myemai...	888 444-5555
LisaR	Lisa			LRaparager@my...	888-555-4444

**Note:** Business groups can be used to denote outside groups as well, such as vendors, consultants and board members. Be creative and you'll get a lot of use out of this feature. Also before assigning users to a business group, you must first create them by clicking on the Manage Groups option in the ribbon bar. Also note that once created, you can assign records to a business group, and in so doing, give access and visibility to everyone that belongs to that group. You'll find information in the Help file on setting up groups and access rights as well as on the <http://www.managepro.com/m8portal.html> site, or you can get personalized training over the web and phone from PST.



## Side Notes:

Before we conclude this document, let me share a few tips that will prove to be helpful guides at one time or another as you complete the OPERATIONS section and put it to work for your team and organization.

1. By now you've noticed the "Goal Type Selection" window that pops up every time you enter a new record. Let's take a moment to clarify what that's all about.

Essentially ManagePro is prompting you with each new GAPR record or line item entry to stop and ask yourself, "Is this a heading for organization purposes, a goal/project, an action step (to reach a goal), or just a simple task?" – one of the many things that need to get done in the process of completing action plans and goals. This basic "goal – action plan – task" differentiation is designed to help you build a clear, easy-to-follow design in ManagePro, which translates to improved performance and follow-through.



All the records function just the same. They all have the same tools, like the ability to attach progress updates, to-dos and documents. For those of you utilizing Balance Scorecards, you can additionally configure the type of goals/projects within a Balance Scorecard format, using the right click Multi-Edit/Type feature, choosing the Goal radial button and then selecting the BSC type from the right drop down menu.

2. We've used the GAPR Outline view for the purpose of this article and building a basic operational framework, but let's cover a couple of my favorite uses of the other views:

- The Map view is great for graphically presenting relationships and context of goals and action plans.
- The Timeline view is excellent for displaying durations and giving you a visual head's up on what's finishing, what's coming and... I can't believe how much stuff there is to get done. It's also got an excellent view for evaluating what projects are adequately resourced and not.
- The Scorecard view provides just what it says, scorecards, and results trends. It's also got an excellent view of the strategic initiatives and all the supporting projects regardless of where they are in Operations.
- The Analytics view provides an analysis and summation of those details you track as important, from customer demographics and buying patterns to % of risk embodied in your product mix.
- The People & Meetings tab, in addition to depicting people, business groups and meetings, also has an excellent view of the relative resource loading for each person. They all become much more of a resource once you have the business process built into ManagePro.

**Reality Check:** When you've framed in your business process in ManagePro, ask yourself: "If someone new to the organization looked at this, could they easily see what our goals are, how we measure progress, what the plan and assumptions are to reach those goals, and what the relative time sequence is for completing our action plans?"

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