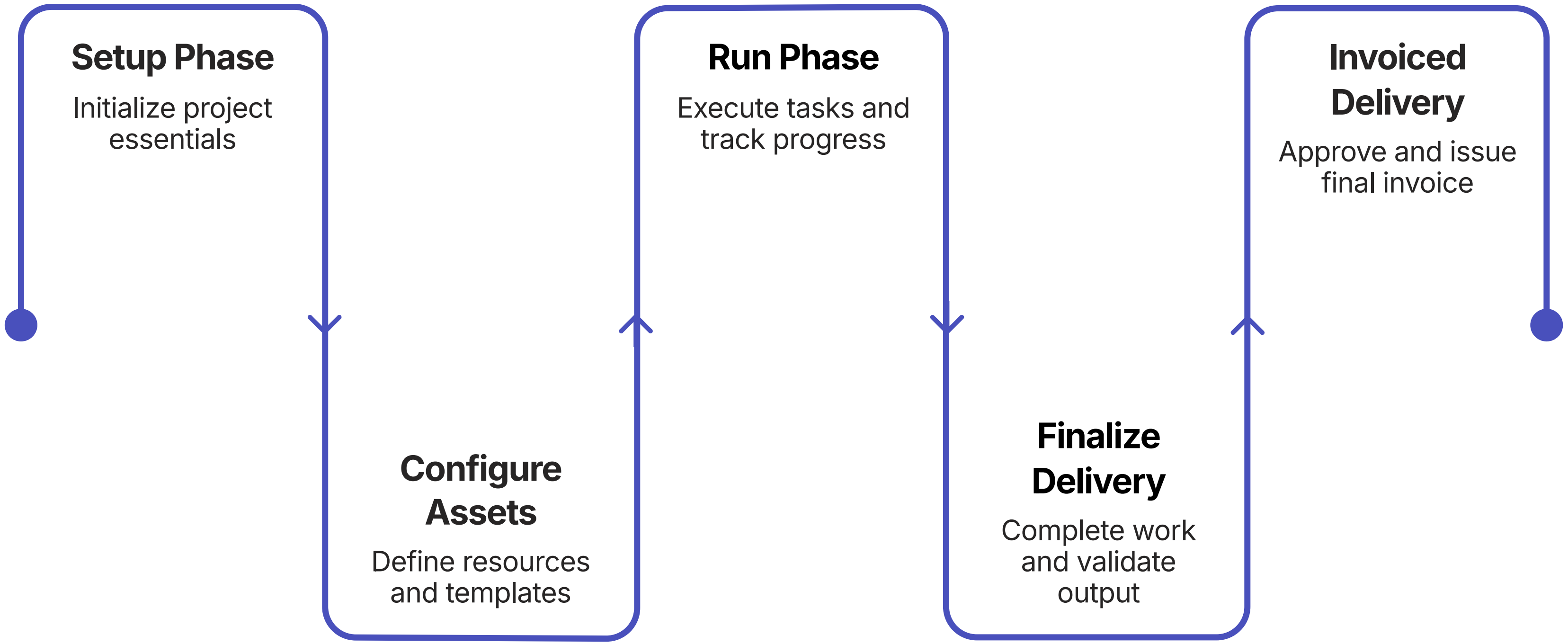
How a PDNA Project Flows

From blank slate to invoiced delivery — the simple critical path of setting up and running a project on the ProjectDNA Suite.

Everything you create in one step feeds the next. Set it up once, and the same information drives the whole engagement — no re-keying, no separate plans.



BIG PICTURE

Three areas, one project at the center

Every project pulls together three working areas — all connected through a single Project at the center.

Workshop

Your methodology — the Library you start from, Value Streams, process flow, and requirements (User Stories & Acceptance Criteria).

Scheduler (RPM)

Your plan — Activity Templates dragged onto a calendar to create Milestones, Meetings, and Workshops.

Administrator

Your commercials — the Statement of Work, Timesheets, Invoices, and Payments.

THE CRITICAL PATH

The critical path, end to end

One simple chain carries the engagement from kickoff to cash. Steps 1–5 set it up. Steps 6–10 run it. The same records flow straight through.

Setup Phase — Steps 1–5

From nothing to an active engagement with schedule on the calendar and SOW costed — usually in one afternoon.

Running Phase — Steps 6–10

Through analysis, leadership sign-off, delivery, and billing — the engagement runs itself off the schedule.

SETTING UP

Phase 1 — Setting up (Steps 1–5)

Five steps take you from nothing to an active engagement — schedule on the calendar, SOW costed — usually in one afternoon.

Step 1

Create the Project from a Methodology Library, From AI Assistant or Upload your data

Step 2

Create the Team — add your people, their project roles, costs

Step 3

Assignment Matrix — who works which Value Stream, what is their attendance requirement

Step 4

RPM - Schedule the Project — drop Activity Templates on the calendar

Step 5

Build the *NEXT* SOW from those same Activity Templates

STEP 1 OF 10

Step 1 — Create the Project

Start from a pre-built **Methodology Library** (or let AI build one, or import your own). The library stamps your new **Project** with everything ready to go.

Methodology Library

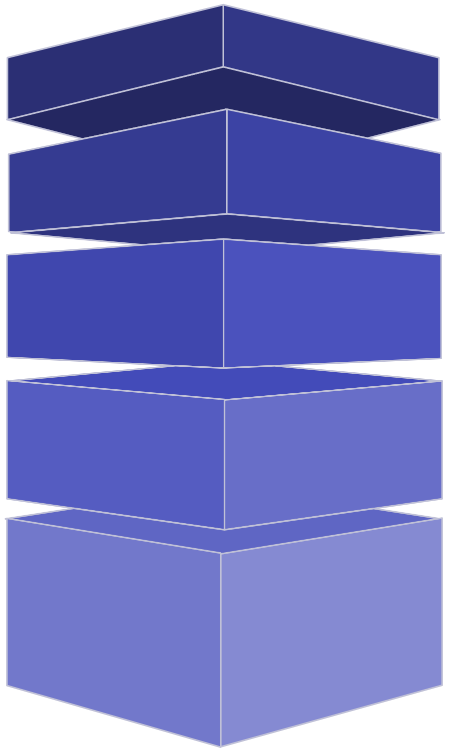
Source of templates and standards.

Value Streams

High-level flows branching from project.

Process Flow

Detailed sequences leading to stories.



Project

Project hub stamped with the library.

Sub-Value Streams

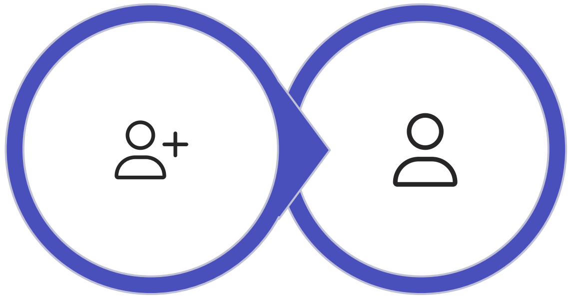
Decomposed streams under each value stream.

Your project now exists — it's the hub everything else connects to.

STEP 2 OF 10

Step 2 — Create the Team

Add your **People** — consultants, client team members, and contractors — one at a time or by spreadsheet import.



These people become assignable in the next step — the Assignment Matrix.

Consultants

Your delivery team members who will run workshops and sessions.

Client Team

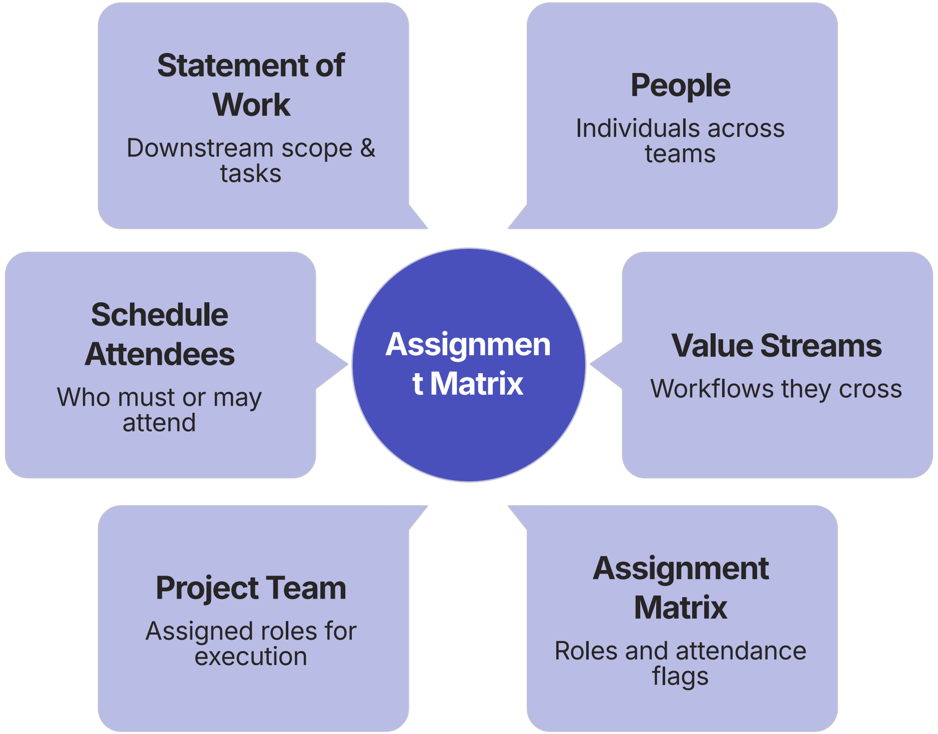
Client-side participants who attend workshops and sign off on deliverables.

Contractors

External specialists brought in for specific Value Streams or phases.

Step 3 — The Assignment Matrix

Assign every person to the **Value Streams** they'll work, in their project role. One click sets each to Required, Optional, For Info, or Replaceable.



Assignment Roles

- **Required** — must attend
- **Optional** — invited but not mandatory
- **For Info** — kept in the loop
- **Replaceable** — can be substituted

Why it matters

Every downstream screen reads from this Matrix. Set it once and attendees are auto-filled across the entire schedule — no manual re-entry.

Set it once — every downstream screen reads from this Matrix.

STEP 4 OF 10

Step 4 — Schedule the Project (RPM)

Drag **Activity Templates** onto the calendar. Each drop becomes a scheduled activity — a Milestone, Meeting, or Workshop — with attendees filled in automatically from the Assignment Matrix.

Milestones

Key delivery checkpoints anchored to the calendar.

Meetings

Preparatory and review sessions with auto-assigned attendees.

Workshops

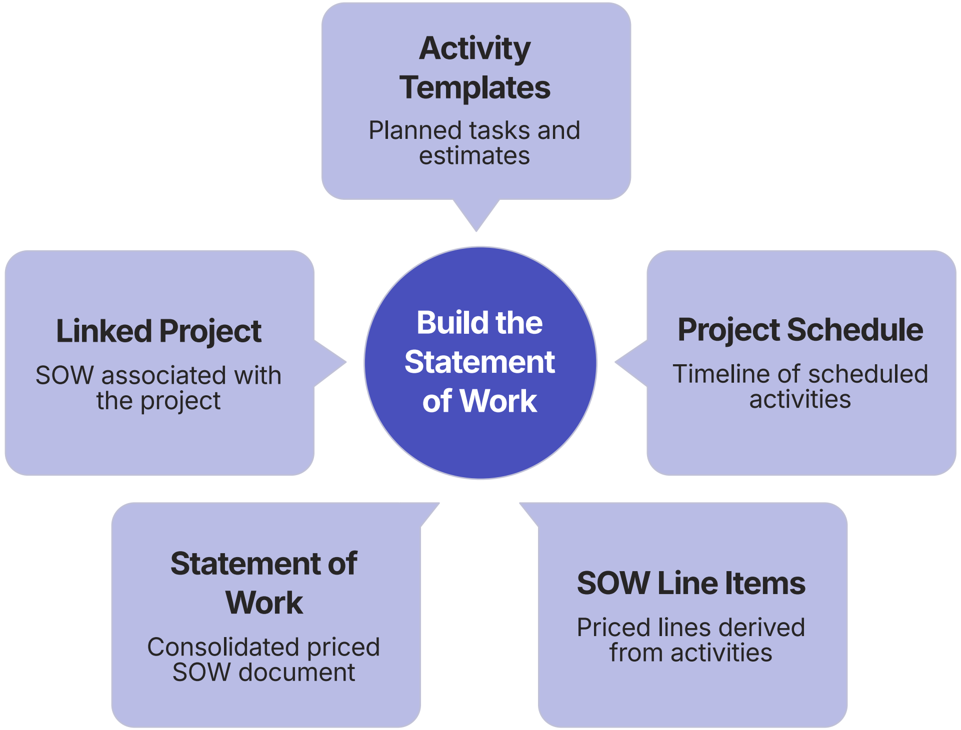
Value Stream analysis sessions scheduled and staffed automatically.

The plan is now on a calendar — and ready to price.

STEP 5 OF 10

Step 5 — Build the SOW

Your **Statement of Work** is built from the very same **Activity Templates** you just scheduled. Each planned activity becomes a priced SOW line item, with hours and cost calculated automatically. Activate it when you're ready for time entry.



What gets created

- Activity Templates → SOW Line Items
- Hours and cost calculated automatically
- Statement of Work linked to the Project

Scope and price now match the plan — automatically. No separate pricing spreadsheet needed.

USING IT

Phase 2 — Running the project (Steps 6–10)

With setup done, the engagement runs itself off the schedule — through analysis, leadership sign-off, delivery, and billing.

Step 6

Preparatory Meetings — orient the team

Step 7

Analysis Sprints — workshop every Value Stream

Step 8

Leadership Plan — lock the implementation plan

Step 9

Design & Delivery — run the sessions

Step 10

Timesheets & Administrator — bill and track burn

STEP 6 OF 10

Step 6 — Preparatory Meetings

Run the scheduled meetings that orient the team to the methodology, their role, and what each workshop expects of them.

Information used

Project Schedule

The pre-built meeting calendar drives which sessions run and when.

Attendees

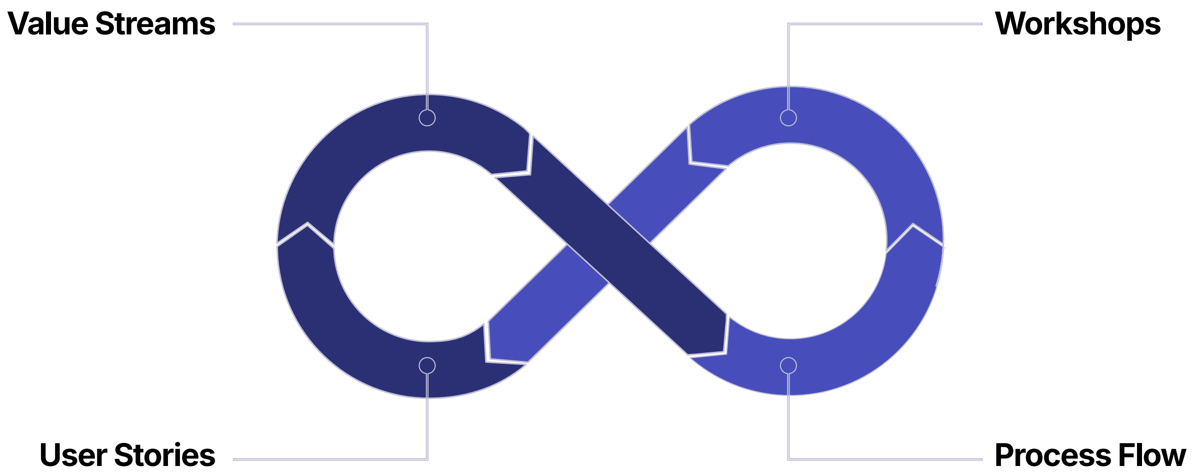
Auto-populated from the Assignment Matrix — no manual invites needed.

A prepared team is ready for analysis.

STEP 7 OF 10

Step 7 — Analysis Sprints (Value Stream Workshops)

Run 2–3 sprints of 4-hour workshops. Each one walks a Value Stream through current state, future state, and Team-Leader handoff — refining the process flow and requirements as you go.



Sprint Structure

- **2–3 sprints** of 4-hour workshops
- Current state → Future state → Team-Leader handoff
- Each sprint refines and agrees requirements

What gets refined

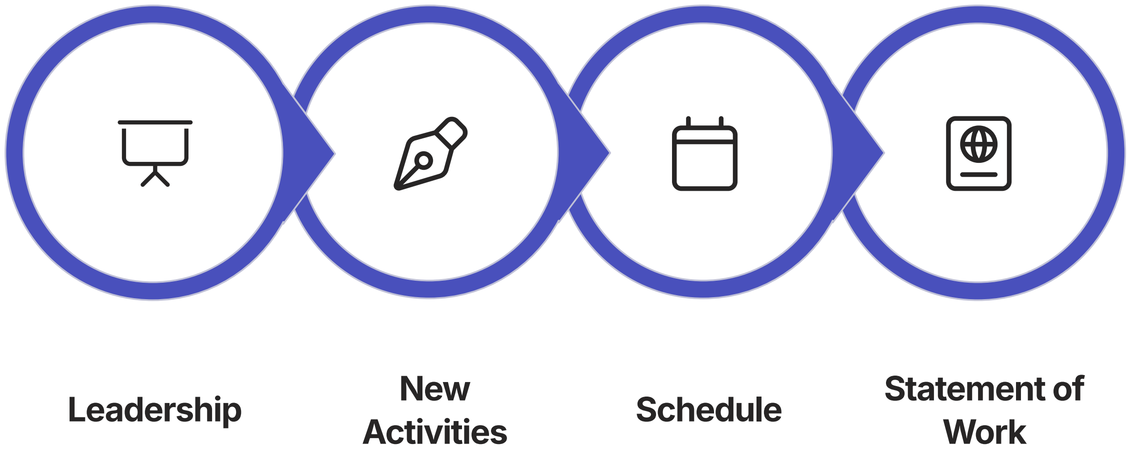
- Value Streams → Process Flow
- Process Flow → User Stories
- User Stories → Acceptance Criteria

Requirements are now captured and agreed.

STEP 8 OF 10

Step 8 — Leadership Plan

Team Leaders present the plan, risks, and opportunities. Activities for the remaining phases are added, and the schedule is applied to the SOW (or a new implementation SOW is created).



Design
Solution design sessions added to the schedule and priced in the SOW.

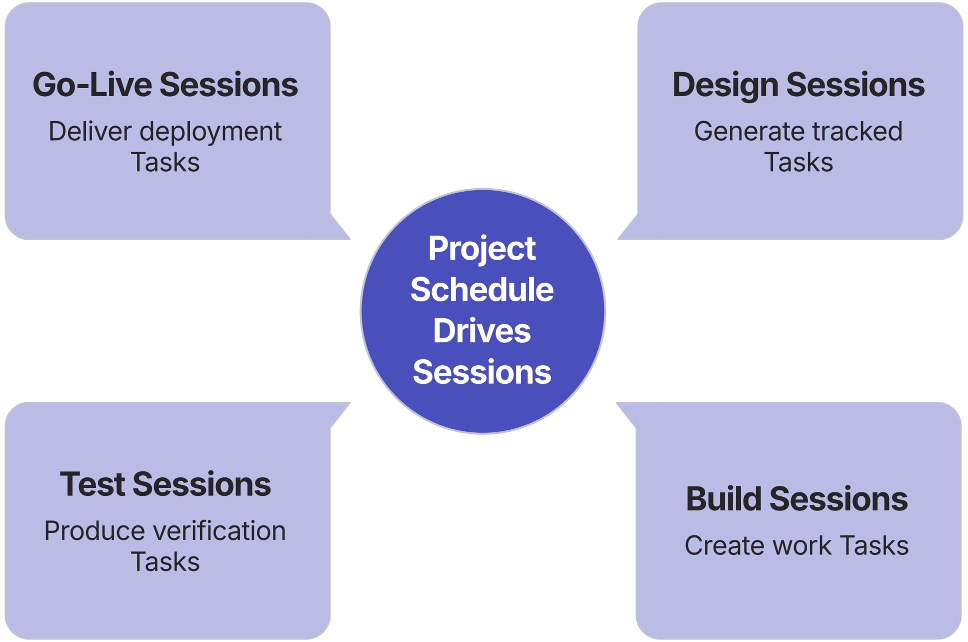
Build
Build activities planned, staffed, and costed from Activity Templates.

Test
Testing phases scheduled with the right attendees from the Matrix.

Go-Live
Final delivery milestone — the plan now extends all the way to Go-Live.

Step 9 — Design & Delivery Sessions

Run the scheduled Design, Build, Test, and Go-Live sessions straight from the RPM calendar, tracking the work as Tasks.



Information used

Project Schedule

The delivery calendar — every session is pre-planned and staffed.

Tasks

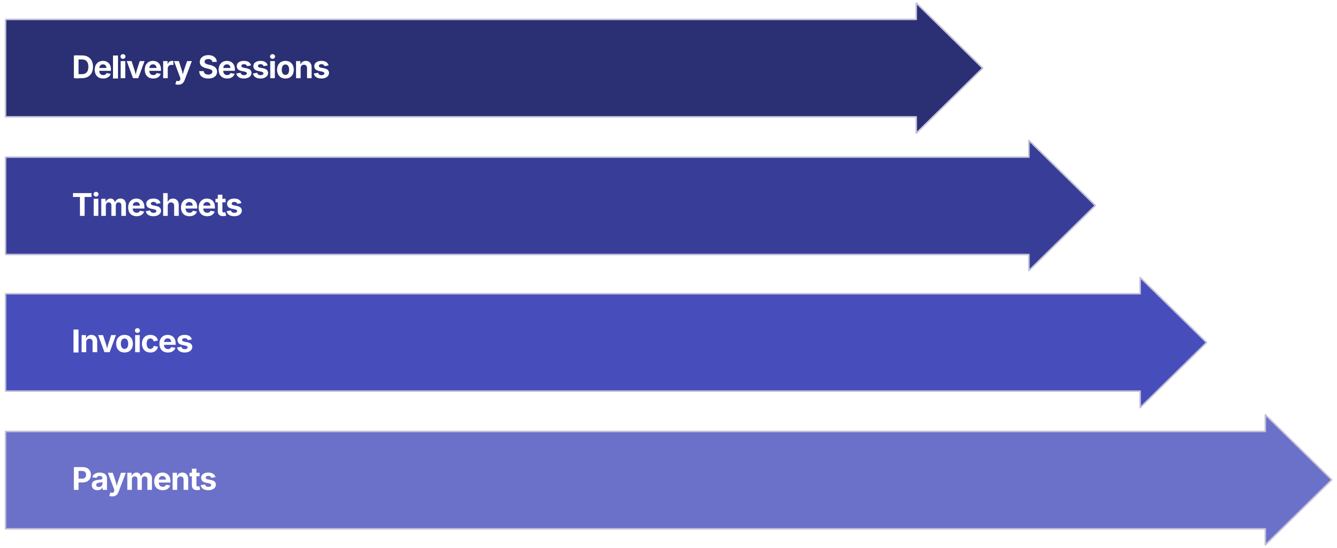
Work items tracked to completion within each session.

Work performed here is captured as actual time in the next step.

STEP 10 OF 10

Step 10 — Timesheets & Administrator

Timesheets capture the actual hours. Consultants bill from them; clients use the same entries to watch the **SOW Burn-Down** (planned vs. actual). The Administrator module handles approvals, **Invoices**, and **Payments**.



What gets created

- Timesheets — actual hours logged
- Timesheets → Invoices → Payments
- SOW Burn-Down = SOW Line Items (planned) vs. Timesheets (actual)

The full loop closes here

Every record — from the Methodology Library through to the final Payment — flows from the same source data. Set up once, delivered and invoiced with no re-keying.

Setup once, delivered and invoiced — all from the same records.

APPENDIX

Behind the scenes (for the technical team)

The friendly business names above map to these database tables. This reference is for developers and system administrators only — the main flow uses business terms throughout.

Business Name	Database Table
Methodology Library	`libraries`
Project	`projects`
Value Streams	`value_streams`
Sub-Value Streams	`sub_value_streams`
Process Flow	`process_boxes`
User Stories	`user_stories`
Acceptance Criteria	`acceptance_criteria`
People (Users)	`users`
Project Team	`project_users`
Assignment Matrix	`project_user_vs`
Activity Templates	`sched_activity_templates`
Project Schedule	`sched_events`
Attendees	`sched_event_attendees`
Statement of Work	`crm_sows`
SOW Line Items	`crm_sow_lines`
Timesheets	`crm_time_entries`
Invoices	`crm_invoices`
Payments	`crm_payments`
Tasks	`tasks`