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Calculated Project Health | Automation Alternatives

Your Guides: Jen Scarlato, Christi Rice



Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Introduction
- What Makes Up Project Health
- Open Mic
- Common Approaches
- Alternative Approaches
- Automation Options
- Open Mic
- Keys to Success Q&A

Goals of this session

- You will leave the session with ideas and examples for improvement
- You will have shared and learned about best practices with your peers

Introduction – The Need

“I need to quickly identify which projects require my attention.”

- CIO Financial Services

“I need to know what factors are being used to determine the health of a project”

- PMO Financial Services

“I need to quickly identify what part of my project requires attention.”

- Project Manager
Healthcare

Introduction – The Challenge

“Red is the new green!”

- PMO Manager Insurance

referring to how his organization went from reporting all projects as green to reporting all as red.

“If you can’t believe the data, how can you believe the analytics?”

- CFO Healthcare

“I want to know if my project is on a path for trouble before it is too late.”

- Project Manager Healthcare

What Makes Up Project Health

Common Factors

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Common Factors To Measure Project Health

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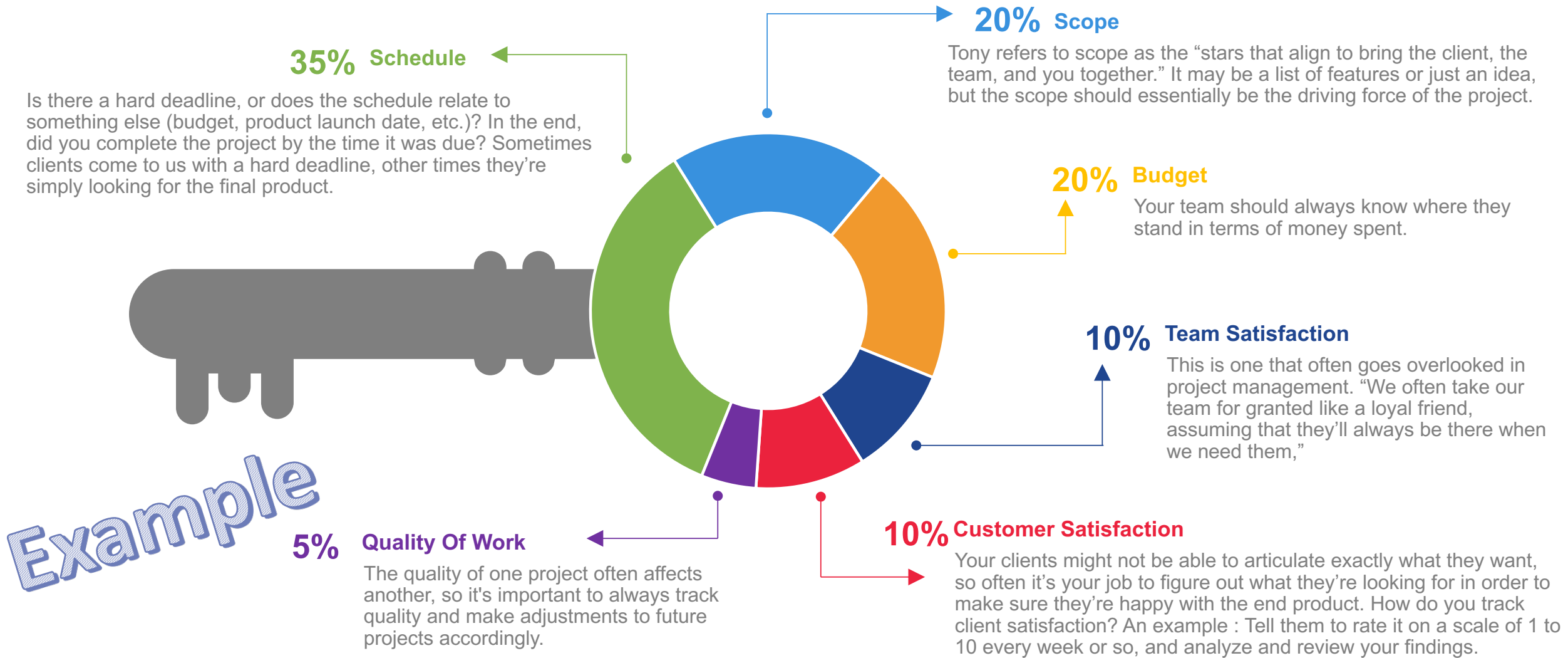
- Schedule
- Scope
- Budget
- Team Satisfaction
- Customer Satisfaction
- Quality of Work

At the beginning of a project, identify your success factors up front.

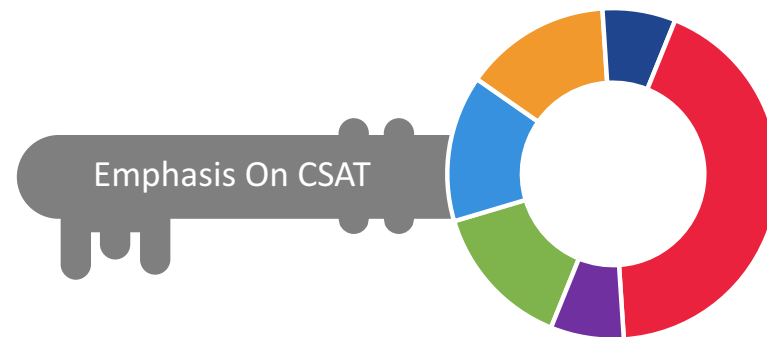
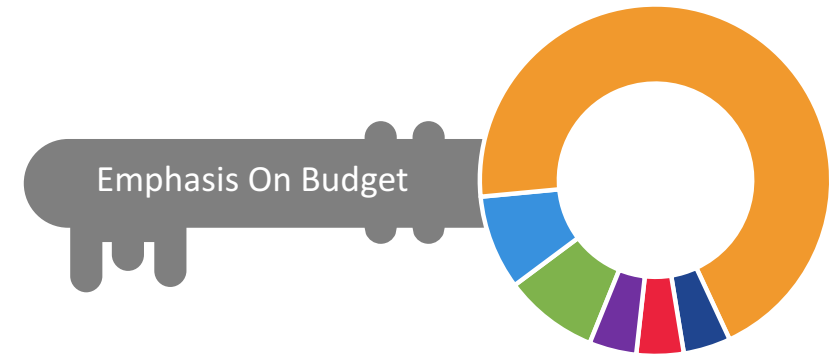
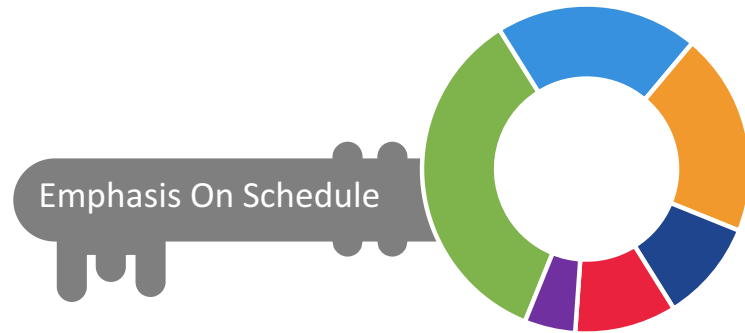
“Every person, from the project manager to the CEO, has a different idea of what a successful project means - and often that’s why teams don’t get projects done efficiently.

~Tony Wong

An Example - Not All Key Project Health Factors Are Equal



An Example - Not All Projects Report Health The Same



Schedule ● **Quality Of Work** ● **Customer Satisfaction** ● **Team Satisfaction** ● **Budget** ● **Scope**

Open Mic

- How do you measure project health? Is it working?
- What challenges are you facing in understanding project health?
- What happens when you do find troubled projects?

Common Approaches

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Project Control: What is health of the project?

Option 1: **Full Earned Value Management.**

PROS: Provides a complete picture of project health based on industry standards.

CONS: Many organizations don't have the process discipline or maturity to make this a reliable set of measures.

Option 2: **Subjective status reporting.**

Relies on Project Managers to provide indications of project health.

PROS: Quickly established.

CONS: Often not trusted and the accuracy depends on Project Manager effectiveness.

Option 3: **Focusing on one primary health indicator (e.g. Financial Variance).**

PROS: Effective at controlling that primary health indicator.

CONS: Often drives the wrong behavior and could have negative impacts on other metrics.

Alternative Approaches

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Alternative Approach

Project Control: What is the health of the project?

Alternative: Using a balanced scorecard approach that includes Adoption Metrics.

Project Name▲	Project Stage	Project Mgr's Overall Assessment	% Aligned for Success (a'/(100-b)'c'd)	% Business Satisfaction (a)	% Hard Delinquencies (b)	% Cost Aligned to Baseline (c)	% Schedule Aligned to Baseline (d)	% Total Delinquencies	Risk Score	Project Compliance Score	Pct of Resources Hard Allocated for next 2 weeks
«» « 1 2 »»»											
ACI e-Health - Canadian Border Clearance	Build	◆	✓ 77	🚩 95	🚩 7	🚩 89	🚩 91	🚩 12	🚩 36	🚩 100	🚩 70
Android Server Replacement	Closeout	◆	✓ 93	🚩 95	🚩 5	🚩 100	🚩 98	🚩 11	🚩 43	🚩 79	🚩 0
App Dev 2013, Project 2014 with MS 1.1	Design	◆	✓ 100	🚩 95	🚩 0	🚩 106	🚩 100	🚩 0	🚩 5	🚩 85	
App Dev 2013, MS 1.1 Consolidation PM	Planning	◆	✓ 92	🚩 95	🚩 0	🚩 105	🚩 93	🚩 8		🚩 75	🚩 57
Blending Machine Install and Integration to ERP	Build	◆	✓ 83	🚩 95	🚩 6	🚩 101	🚩 86	🚩 8	🚩 30	🚩 100	🚩 100

Predictive Analytics Approach

Project Control: What is the health of the project?

Alternative: Focus on burn down rates to do predictive analysis on the status of a project.

- Collect data points based on usage and forecast such as
 - % of a projects spend based on the length of the project.
 - i.e. 50% of a project has been spent, however we are only 20% completed.
We are on track to have a red status based on our current financial burn rate
 - % of tasks complete on time based on number of tasks left.
 - i.e. 45 % of the tasks completed have been late, therefore it is safe to assume that this trend will be continue and our schedule is at risk.

Open Mic

- What specifically do you measure and is it objective or subjective?
- What project health metrics are most critical to your organization? (slide 5)
 - Cost
 - Schedule
 - Financial
 - Resources
 - Scope
 - All of the above

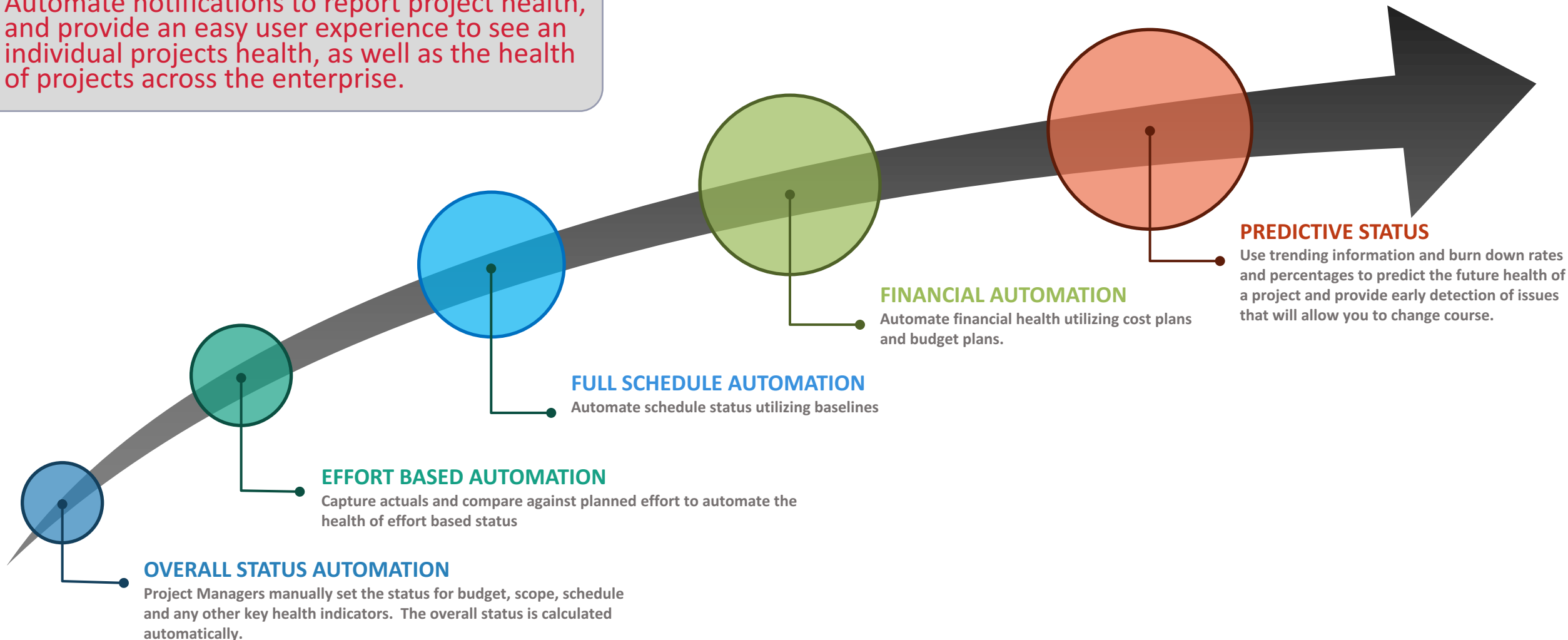
Automation Options

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Automation and Maturity

Automate notifications to report project health, and provide an easy user experience to see an individual projects health, as well as the health of projects across the enterprise.



Calculation and Delivery Of Project Health

- Dashboards
- Notifications
- Status Reports
- Executive Views (i.e. Top 5 / Bottom 5)

The audience for consuming project health varies by persona. The CIO is looking for a higher level view of project health across the enterprise, where the Project Manager is looking for specific health of schedule and budget.

Executive Dashboard (RegoXchange)

Executive Dashboard ⚙️														
Project OBS <input type="text"/>		Project Manager ID <input type="text"/>												
<input type="button" value="Filter"/>		<input type="button" value="Show All"/>		<input type="button" value="Save Filter"/>		<input type="button" value="Clear"/>								
Name	ID	Overall Status▲	Schedule Status	Scope Status	Cost/Eft Status	Late AI	Late Issues	Late Risks	Late Tasks	Late Milestones	Sched Var	Effort Var	Hrs Past Base	Days Over Base
2015 Master Program	PRJ0165	◆	◆	◆	◆	◆ 0	◆ 0	◆ 0	✖ 2	◆ 0	◆	◆	◆	◆ 0
2015 Test Program	PRJ0167	◆	◆	◆	◆	◆ 0	◆ 0	◆ 0	✖ 2	◆ 0	◆	◆	◆	◆ 0
Bat Cave Re-Design	PRJ0001	◆	◆	⚠	◆	◆ 0	✖ 1	✖ 2	✖ 8	✖ 2	◆ 0	◆ (1)	✖ (171)	◆ 0
Big Bang Theory Superhero Contest	PRJ0022	◆	⚠	◆	◆	◆ 0	◆ 0	✖ 1	✖ 6	✖ 2	✖ (133)	✖ (858)	✖ (18,796)	✖ 487
CER - Test Project 1	PRJ0042	◆	◆	⚠	⚠	◆ 0	✖ 1	✖ 1	✖ 5	✖ 1	◆ 0	✖ (210)	✖ (10,144)	◆ 0
CER Test Programme	PRJ0052	◆	⚠	◆	✖	◆ 0	◆ 0	◆ 0	✖ 2	◆ 0	◆	◆	◆ 0	◆ 0
Gretchen's Rockin' Program	PRJ0048	◆	◆	◆	◆	◆ 0	◆ 0	◆ 0	✖ 3	◆ 0	◆	◆	◆ 0	◆ 0
JAMTP	PRJ0121	◆	◆	◆	◆	◆ 0	✖ 1	✖ 1	✖ 17	✖ 3	✖ (61)	◆ 0	◆ 0	✖ 48
MD Test	PRJ0177	◆	◆	◆	◆	◆ 0	◆ 0	◆ 0	✖ 10	✖ 2	◆	◆	✖ (1,600)	◆ 0
MDG	PRJ0127	◆	◆	⚠	◆	◆ 0	◆ 0	✖ 1	✖ 15	✖ 3	◆	◆	✖ (190)	◆ 0
Open Superhero School	PRJ0010	◆	◆	◆	◆	◆ 0	◆ 0	✖ 2	✖ 7	✖ 2	✖ (962)	✖ (407)	✖ (27,093)	✖ 4,739
PSJTPROG1	PRJ0098	◆	◆	◆	◆	✖ 1	✖ 1	✖ 1	✖ 11	✖ 2	◆ 72	◆ 100	◆ 0	◆ 0
maccabe_test	PRJ0099	◆	◆	◆	✖	◆ 0	✖ 1	✖ 1	✖ 16	✖ 3	◆ 0	◆ 0	◆ 0	◆ 0

View All Status Reports (RegoXchange)

All Status Reports

Project ID Status Date to

Project Project Overall Status

Project Manager Current

Active

Current	Project ID	Project	Project Manager	Status Date	Project Overall Status	Current Report Overall Status	Cost/ Effort	Schedule	Scope
✓	PRJ0012	Create Secret Identity	Manager, Project	17.4.2013	!	!	!	!	✓
✓	PRJ0022	Big Bang Theory Superhero Contest	Spiderman, Spidy	18.4.2013	✓	✓	✓	!	✓
✓	PRJ0042	CER - Test Project 1	Reynolds, Clayton	21.8.2013	✓	✓	✗	!	✓
✓	PRJ0043	CER Test Program	Reynolds, Clayton	21.8.2013	!	!	✓	✓	✓
✓	PRJ0019	Develop Transporters	Sam, Uncle	13.12.2013			✗	✓	✗
✓	PRJ0017	Extract Aquaman From Enemy	America, Captain	16.12.2013			✓	✓	✓
✓	PRJ0020	Ironman Wonder Woman Wedding	America, Captain	16.12.2013			✓	!	✓
✓	PRJ0023	Make Clark Kent Cool	Kent, Clark	16.12.2013	!	!	✗	✗	✓
✓	PRJ0010	Open Superhero School	Manager, Project	16.12.2013	✓	✓	✓	✓	✓
✓	PRJ0013	Rebuild Wayne Manor	Mary, Aunt	16.12.2013			!	!	✓

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Project Status and Cost (RegoXchange)

Project Status and Cost

Project OBS

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H

Active

All

▼

Project(s)

▼

Project Manager(s)

▼

Filter

Show All

Save Filter

Clear

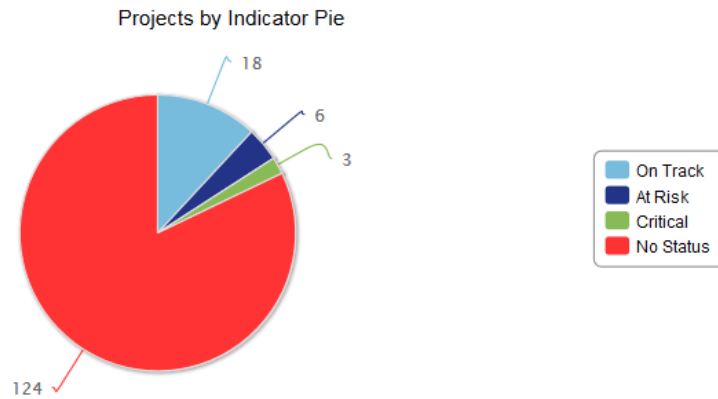
Project	Project Manager	Start	Finish	Active	Overall Status	Budget Status	Capital Budget	Operating Budget	Total Budget	Capital Planned	Operating Planned	Total Planned	Capital Actuals	Operating Actuals	Total Actuals	Budget Variance (\$)	Budget Variance (%)
Search for Nemesis	Mary, Aunt	7/30/12	3/2/15	✔	✖	◆	0	0	1,287,000	0	0	1,577,000	0	52,401	52,401	(290,000.00)	(22.533022533%)
Cure the Hulk	Kent, Clark	7/30/12	2/16/15	✔	⚠	⚠	0	0	596,600	0	0	786,400				(189,800.00)	(31.813610459%)
Ironman Wonder Woman Wedding	America, Captain	4/18/12	7/20/13	✔	✖	✖	0	0	715,000	0	0	840,000	0	43,002	43,002	(125,000.00)	(17.482517483%)
Develop Transporters	Admin, Rego	10/29/12	9/2/13	✔	⚠	⚠	0	0	460,500	0	0	570,500	0	40,250	40,250	(110,000.00)	(23.887079262%)
Big Bang Theory Superhero Contest	Spiderman, Spidy	10/29/12	10/5/15	✔	◆		0	0	135,000	0	0	240,000				(105,000.00)	(77.777777778%)
BMI - Introduction To Clarity	Dolak, Jerry	2/19/15	10/5/15	✔			0	0	75,000	0	0	79,000				(4,000.00)	(5.333333333%)

Projects By Status Indicator (RegoXchange)

Projects by Indicator Pie

OBS Manager

Filter Show All Save Filter Clear



Indicator

Indicator Drill

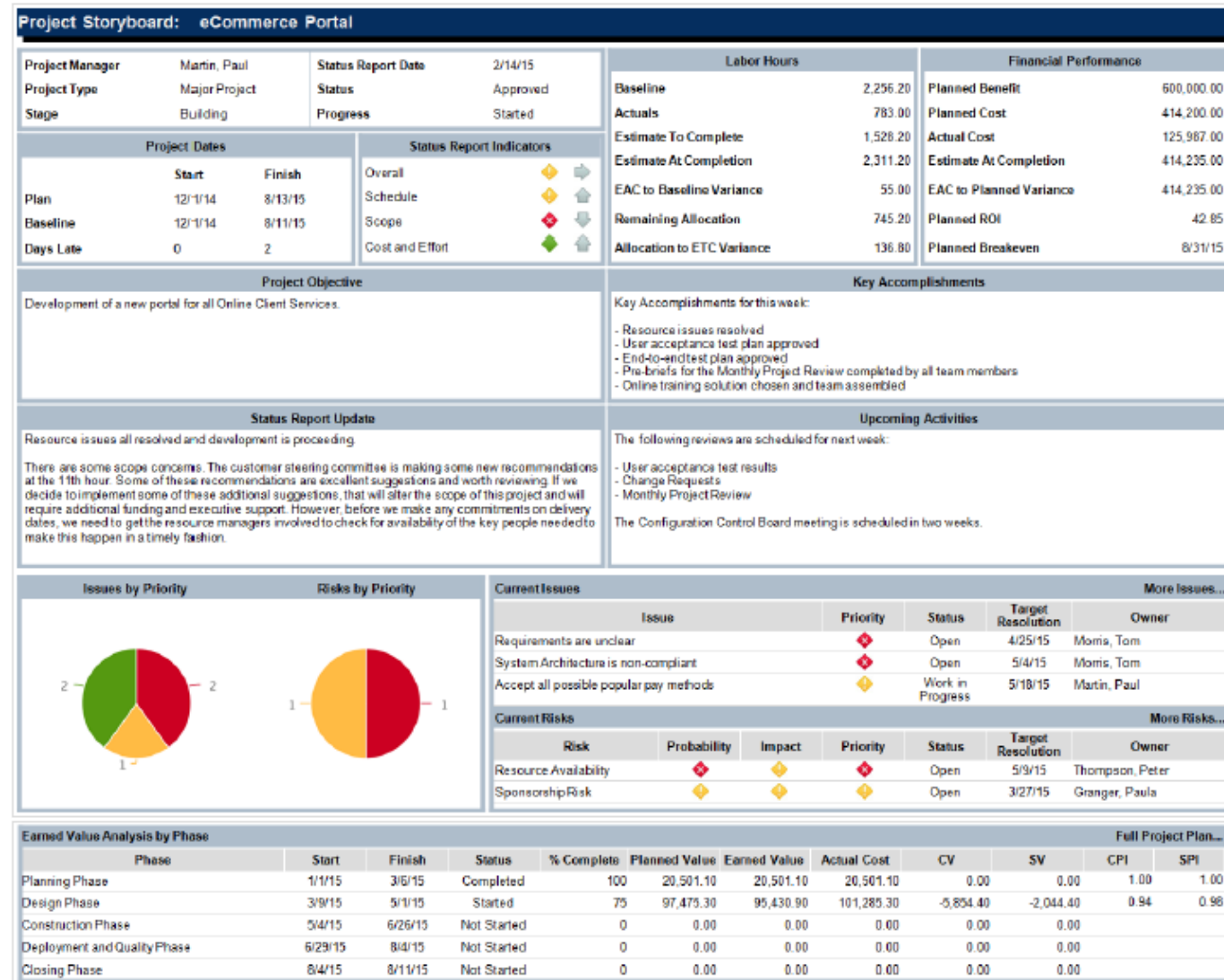
Status Indicator▲	Investment Name	Investment ID	Manager Name	Start	Finish
At Risk	Test concentrates	PRJ0038	West, Wally	5/21/00	6/17/17
At Risk	Search for Nemesis	PRJ0008	Mary, Aunt	7/30/12	3/2/15
At Risk	Invisible Forcefield Upgrade	PRJ0014	America, Captain	2/17/13	3/2/15
At Risk	SpiderWeb.net User Interface Refresh	PRJ0015	Mary, Aunt	2/15/13	7/3/13
At Risk	CER Test Program	PRJ0043	Reynolds, Clayton	7/30/12	12/23/14
At Risk	Superhero Charity Event	PRJ0018	Kent, Clark	7/30/12	8/12/13

Displaying 1 - 6 of 6

Top 50 Project Watchlist (OOB Jaspersoft)



Project Storyboard (OOB Jaspersoft)



Keys To Success

- It starts with process – what outcome, decision, or answer are you looking for?
- Data must be trusted
- Goal-question-metric (GQM)
- What do you do with the results?
- You need a baseline (behavioral)

Questions?



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- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



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888.813.0444



Email

info@regouniversity.com



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www.regouniversity.com