



Effective Performance Reporting for Projects

“Raising the Bar”



**PMI NJ ~ Regional Symposium
May 6 2002 ~ Pines Manor, Edison NJ**



JemWorx, LLC... *where excellence is the norm.*



... a resource of **experienced,**
professional *and*
management

SKILLS

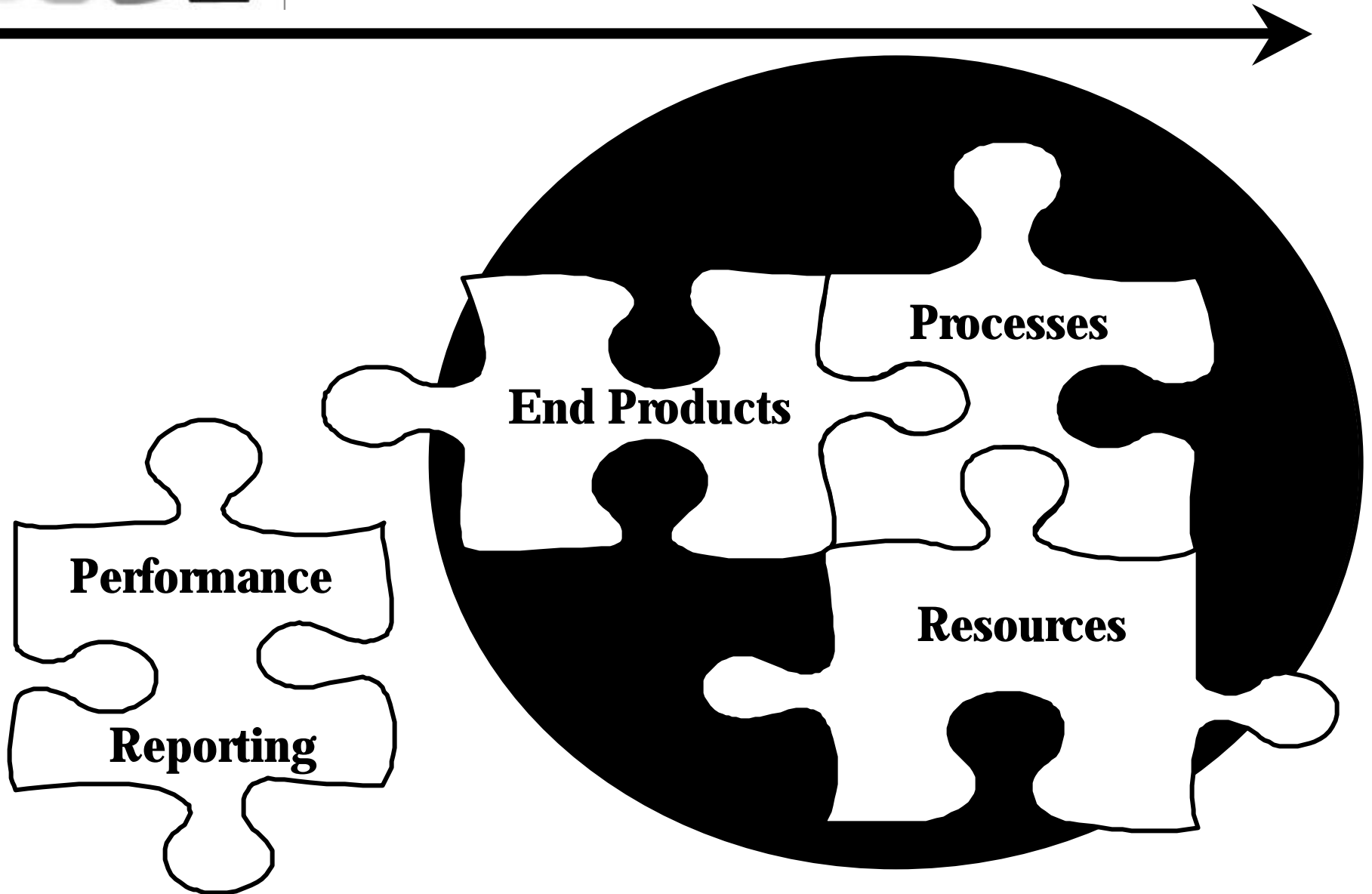
... focused on achieving **worthwhile,**
practical *and*
working

RESULTS

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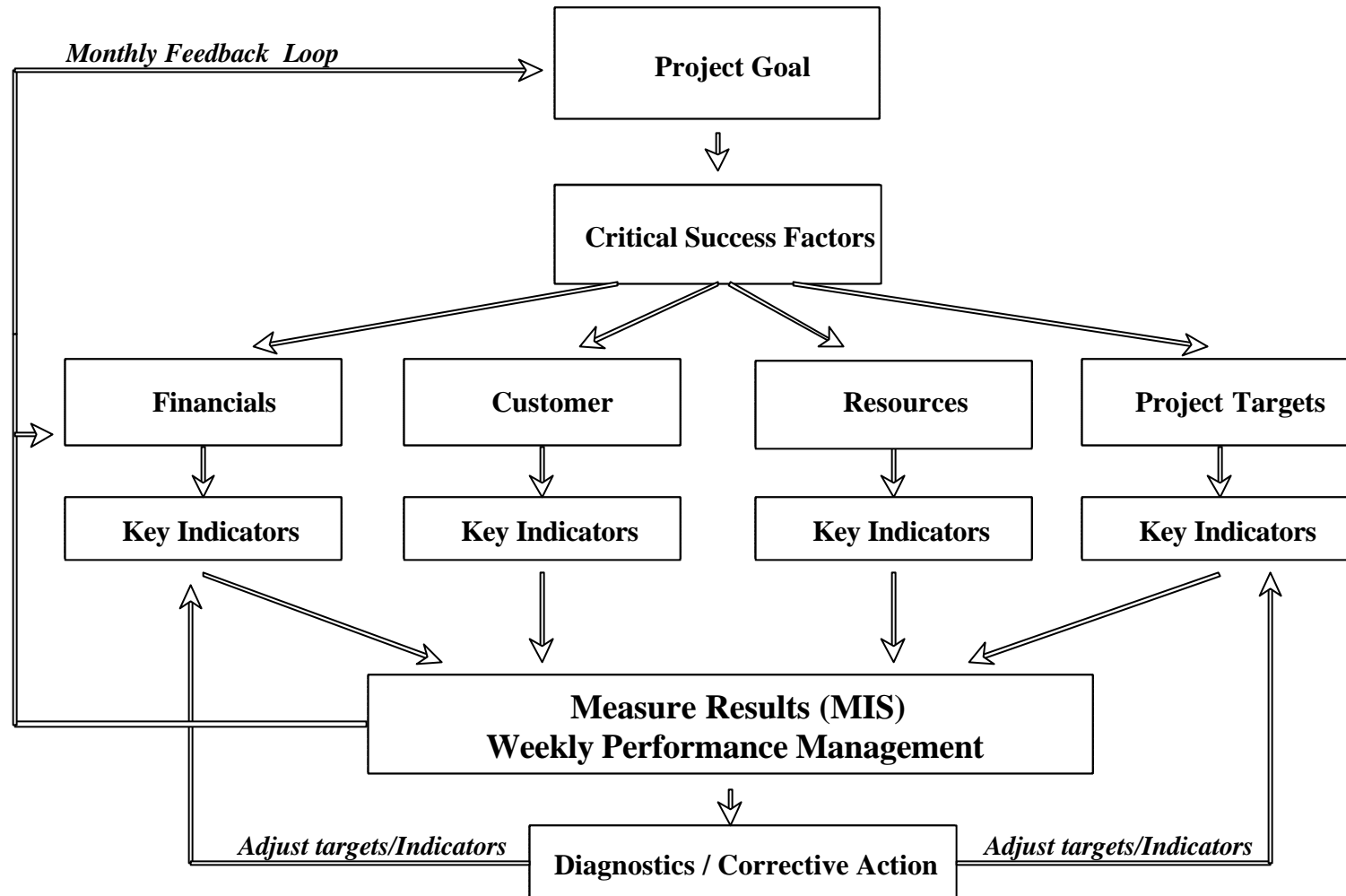


Management is Management !



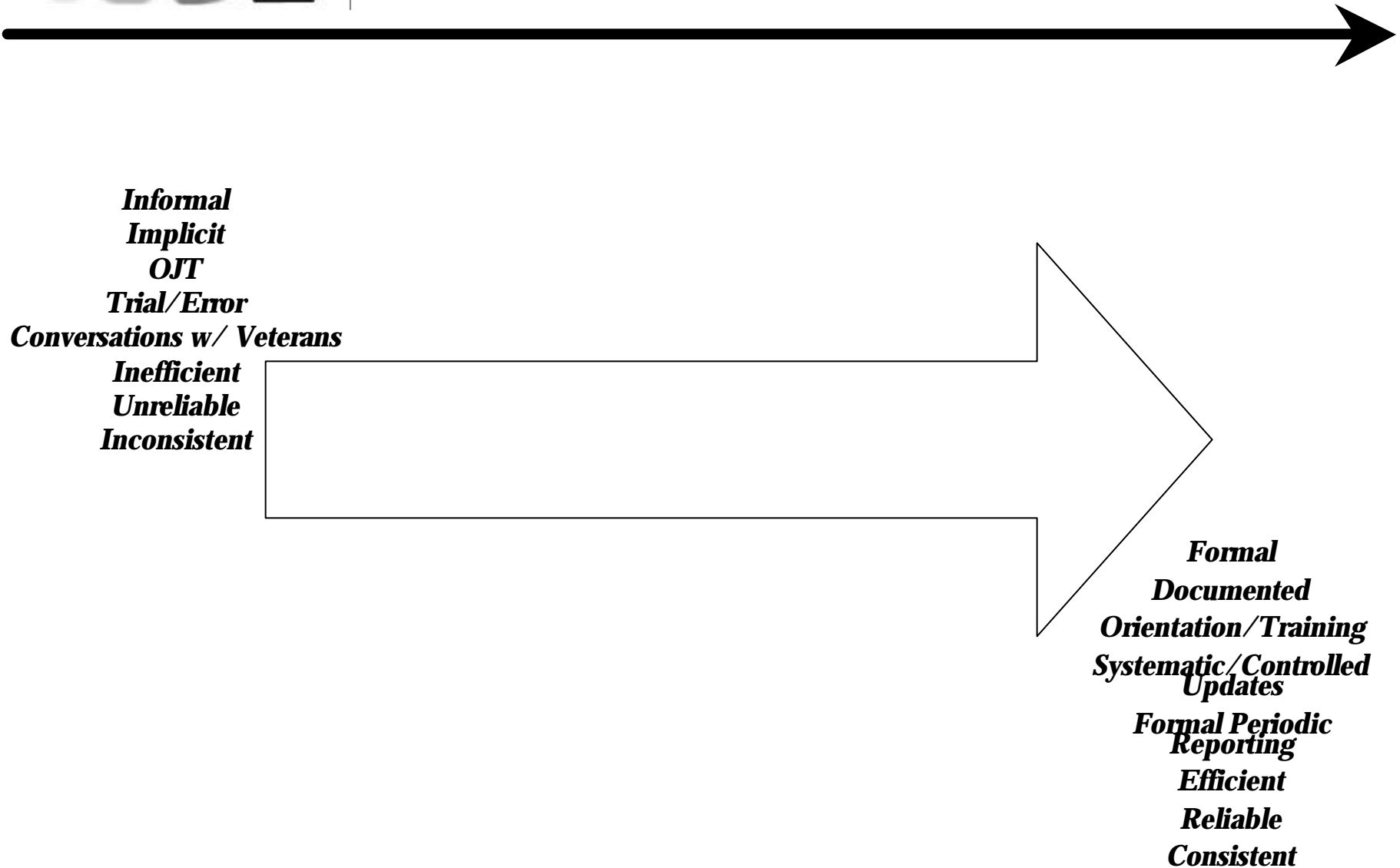


Performance Reporting Process





The Management Continuum





The Development Process



Investigation... *discovery & data gathering*

Integration... *gap identification*

Identification... *detailed blueprint*

Implementation... *achievement*



Phase I

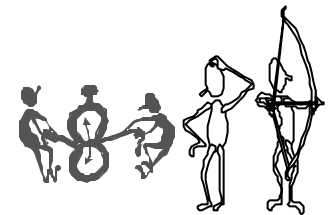
Investigation





Investigation – Definition

- **3 Component Constraints**
 - Identify the ***Resources*** needed versus those available
 - Identify the prevalent ***Issues*** and ***Concerns***
 - Identify the ***Goals*** and ***Objectives*** of the project

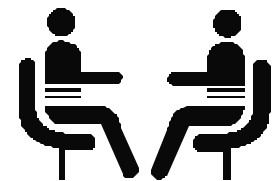




Investigation – Approach

~ INTERVIEWS ~

- **What Project Performance Reporting exists?**
 - How does it exist?
 - What specifically exists?
 - What are the sources?
 - How is it developed?
 - How is it disseminated?
- **Looking to document**
 - Explicit or Implicit?
 - What is missing?
 - Timely?
 - Reliable?
 - Appropriate?
 - Consistent?

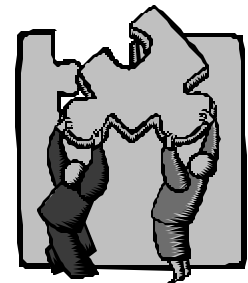




Investigation – Result

~ TRENDS & THEMES ~

- What Project Performance Reporting exists
- How it is developed and from what data source
- How it is disseminated
- How complete, appropriate, and explicit it is
- How timely, reliable and consistent it is





Investigation – PMI-BOK Link

- **Two Processes**

- Initiation ~ *contracts*
- Planning ~ *initial high level plans*

- **All Knowledge Areas**

- Integration ~ *identify interdependencies and interrelationships*
- Scope ~ *identify all areas within and excluded from the scope of the effort*
- Time ~ *initial high level project plan*
- Cost ~ *initial budgets and forecasting methodology*
- Quality ~ *identify current metric sources and uses*
- HR ~ *number and scheduling of resources*
- Communication ~ *determine content, form and deployment*
- Risk ~ *identify and analyze*
- Procurement ~ *identify sources and develop selection criteria*





Phase II

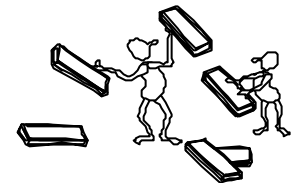
Integration





Integration – Definition

- Sifting
 - *Concerns from complaints*
 - *Relevant from irrelevant*
- Aligning
 - *Issues with goals*
 - *Information with concerns*





Integration – Approach

- **Identify and Integrate**
 - Best Practices ~ “*share the wealth*”
 - Problems ~ *root causes*
 - Gaps ~ *present practice versus desired project performance reporting*





Integration – Result

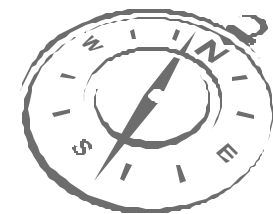


- **Design**

- Retain ~ *the good in the “old”*
- Refine ~ *existing project performance reporting mechanisms*
- Redesign ~ *ineffective, inappropriate practices*
- Remove ~ *problems and obstacles*

- **High Level Plan**

- Integrate *the redesign*
- Close *the gap between what “is” and what “should be”*





Integration – PMI-BOK Link

● Two Processes

- Planning ~ *Mid level plans (milestones/deliverables)*
- Controlling ~ *regular status meetings and reporting*

● All Knowledge Areas

- Integration ~ *document and describe interdependencies*
- Scope ~ *management and control*
- Time ~ *mid level project plan*
- Cost ~ *reporting budget variances and forecasting*
- Quality ~ *identify gaps between current and desired measurements*
- HR ~ *identify requirement gaps and inconsistencies*
- Communication ~ *begin according to plan*
- Risk ~ *develop action plans to exploit opportunities and mitigate risks*
- Procurement ~ *identify gaps between requirements and costs*





Phase III

Identification





Identification – Definition

- **First Glance at project performance reporting**

- Mechanisms ~ *what it will be done with*
- Processes ~ *how it will be done*
- Procedures ~ *rules and regulations*

- **Action Plans**

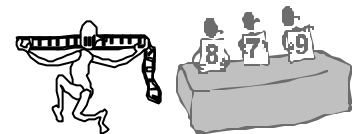
- Resource assignments ~ *who will do it*
- Timeframe development ~ *when it will be done*
- Specific and detailed ~ *clarity and accountability*





Identification – Approach

- **What are the project performance measures?**
 - Strategic success factors ~ *what “defines” success*
 - Key operational indicators ~ *what “measures” success*
- **How will they be conveyed?**
 - Tracking and monitoring ~ *consistent*
 - Reporting ~ *appropriate form and dissemination*





Identification – Result



- **Blueprint**
 - *What will be done*
 - *How it will be done*
- **Implementation Plan**
 - *Who will do it*
 - *When it will be done*





Identification – PMI-BOK Link

● Two Processes

- Planning ~ *detailed project plans*
- Controlling ~ *status meetings and reporting*

● All Knowledge Areas

- Integration ~ *streamline or redesign interdependencies*
- Scope ~ *management and control*
- Time ~ *detailed project plans*
- Cost ~ *reporting budget variances and forecasting*
- Quality ~ *design desired measurements*
- HR ~ *plans to fill resource requirements and resolve gaps*
- Communication ~ *continued according to plan*
- Risk ~ *implement action plans to exploit opportunities and mitigate risks*
- Procurement ~ *identify specific suppliers negotiate contracts*





Phase IV

Implementation





Implementation – Definition

- Execute Plans ~ *as designed*
- Manage ~ *team and process*
- Control ~ *risks and opportunities*
- Train ~ *non project staff*
- Document ~ *success, failures, outstanding issues*





Implementation – Approach



- **Pilot Test**

- One area, department, process, etc.
- Key Indicators ~ *refined, sources secured*
- Procedures ~ *tested and adjusted*
- Reporting ~ *delivered and refined*
- Training ~ *delivered*

- **Roll out**

- Systematic
- Controlled





Implementation – Result

- Successful *achievement* of project goals
- *Training* fully accomplished
- Process documented and *knowledge shared*
- *Benefits* realized
- Audit process established to ensure *sustainability*





Implementation – PMI-BOK Link

● Three Processes

- Controlling ~ *status meetings and reporting*
- Executing ~ *plans deployed, enhancements accomplished*
- Closing ~ *documentation*

● All Knowledge Areas

- Integration ~ *test and implement new procedures regarding interdependencies*
- Scope ~ *management and control of scope*
- Time ~ *adhere to project plans*
- Cost ~ *reporting budget variances and forecasting*
- Quality ~ *test and implement new measurements*
- HR ~ *pilot and roll out new environment filling requirements and resolving gaps*
- Communication ~ *continued according to plan*
- Risk ~ *implement appropriate plans to exploit opportunities and mitigate risks*
- Procurement ~ *institute new procedures closing gaps and finalize supplier contracts*





Conclusion ~ Goals Met

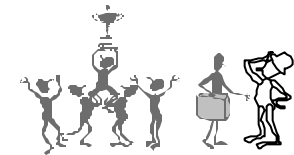
- *Early warning*
- *Consistent Process*
- *Appropriate Reporting*
- *Assurance of Sustainability*





Benefits

- **Project Team**
 - *Clear* roles and responsibilities
 - *Understand* requirements and performance criteria
- **Project Manager**
 - Effective and efficient project management *tool*
 - *Assurance* of comprehensive project oversight
- **Management**
 - Timely and accurate “*dashboard*”
 - Facilitates *appropriate* involvement





Discussion



Q & A