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## **Project Management Best Practices: *Achieving Business Results***

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Solution Architect  
Oracle Corporation



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# Presentation Agenda

- Overview & Setting the Stage - *Kazim Isfahani*
  - Industry, Business & Operational Challenges
  - Insight into the PMO
  - Market Definitions
- Best Practices For Business Results - *Kevin Durand*
  - Key Project Management Challenges & Best Practices
- Recap and Q&A

# Operational Challenges Across Industries

## Professional Services

### Drive Successful Engagements



“How can I mitigate risk associated with client engagements through better visibility, compliance, control, & collaboration processes?”

“The Standish Group, an IT consultancy, tracked about 10,000 projects in 2004, and found that 53% were delayed or over budget.”  
- Capgemini 24-Month Future Scan

## Financial Services

### Grow Business & Cross-Sell to Customers



“How can I streamline my business processes to grow wallet share & shorten time to market for new products & services?”

The average cost to acquire a new customer is \$3,500 in the US

## A&D

### Continuous Changes and Supply-chain Constraints



“How can we collaborate more effectively with suppliers and service providers?”

Establishing inter-company business process management for visibility and control of demand is critical for commercial [aerospace and defense] companies that continue to expand their contract manufacturing relationships globally

## Healthcare

### Mitigate Cost & Comply with Regulations



“How can I gain efficiencies in my clinical and administrative operations? How can I comply with regulatory requirements?”

In an Economist Intelligence Unit Survey, 73% of Healthcare Providers who responded stated a key challenge was Government pressure to lower medical costs.

## Retail

### Global Expansion



“How do we prepare our organization for sustainable growth?”

As retailing becomes increasingly consolidated, and global; there is a growing feeling of exposure in the supply chain and in staffing

# Interesting Stats and Nuggets



- Who prioritizes the projects that the PMO manages?
  - Executive council 36%
  - Cross-functional team or steering committee 15%
  - Business units 15%
  - PMO prioritizes projects 12%



- Seventy percent of plans fail due to poor execution
- With a PMO, organizations can improve delivery staff productivity by 30% and reduce project spend by 30%



- 30% of North American companies lack a PMO
  - Same 30% experiences a 74% project failure rate
- Companies implementing PMOs successfully see an approximately 80% ROI, a 20% reduction in project cycle time, and a 30% to 35% increase in successful project delivery
- In project mature firms, a PMO can be up and running within 12 months; for companies with immature practices a fully implemented PMO can take up to seven years



# What Does the PMO Do?

## The PMO is responsible for:

- Measuring and Reporting Progress
- Defining, Monitoring, & Reporting on Milestones and Deliverables, & Issue Resolution
- Preparation of Weekly Status Meetings, including:
  - Accomplishments
  - Issues
  - Completion Percentage
  - Burn rate
- Managing Change Control Process
  - Preparing Estimates for Change Requests
  - Conducting Change Control Meetings
  - Conducting Impact Assessment for Agreed-upon Changes
  - Update Plan to Reflect Changes
- Conducting Risk Review
- Establishing Shared Risk Mitigation Plan
- Fostering Clear Communication of Multi-Site Projects
- Maintaining Project Documentation Repository
- Managing Key Deliverables Sign-Off
- Conducting Quality Assurance Reviews
  - Establishing Quality Standards
  - Performing Quality Reviews to Review Planned Deliverables and Dates
  - Managing Standards Adherence
- Identifying Potential Synergies among Various Components
- Synchronizing Activities among Geographies
- Fostering Communications among Geographies and Business Units
- Facilitating Workshops and Software Trials



# The Successful PMO

## *Insights from Successful Efforts*

- Does not set policy – Facilitates it
- Measures for Value
- Manages expectations and guides project teams
- Remains a neutral organization
- Acts as a liaison between business units
- Continually shows and builds credibility





# What is a Project Management Best Practice?

▶ A Best Practice is a method, process, procedure or technique that is proven to reliably and consistently produce desired results

▶ **Starting Point**

Set a baseline

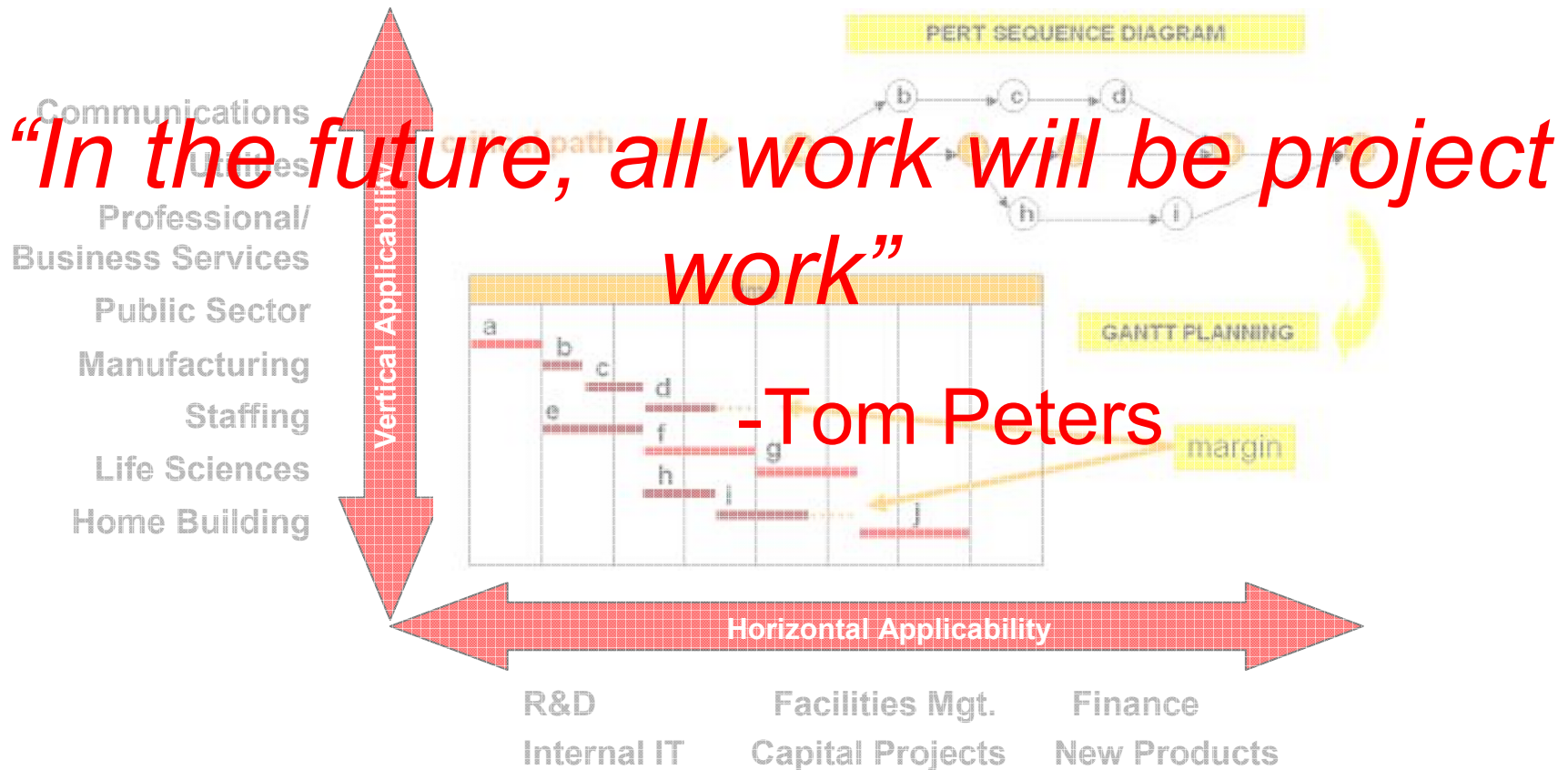
▶ **Barometer to Measure Current State**

Define your benchmark

▶ **An Evolving Practice**

Perform continuous improvement

# “Everything is a Project”





# Intent of Project Management

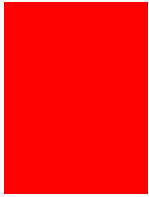
## *Best Practices*

- Studies show that most projects, especially large ones, do not end successfully
- At the same time, organizations expect projects to be completed faster, cheaper, and with high quality
- The only way this can happen is by establishing and using effective project management processes and techniques



## Best Practices For Business Results

Kevin Durand  
Solution Architect  
Oracle Corporation



# Key Challenges & Best Practices





# Challenge #1

- Inadequate Definition and Management of Project Scope
  - Vaguely-written scope definitions
  - Problems in gathering user requirements
  - Lack of training on eliciting needs from users
  - Pressure to build before projects are adequately defined
  - Lack of Rigorous Scope Management
  - Projects not aligned to strategic goals

**Result: Lack of Project Focus and Alignment**



# Best Practice:

## *Scope Control*

- Scope must be clear, concise, and unambiguous
  - Scope is clearly and commonly understood by project stakeholders and team members
  - Review contract scope with project's user community to obtain 100% buy-in to what you are about to perform and deliver!
  - Obtain agreement on what is in, and out of, scope
- Creation and baseline of project scope and work plans
- Early establishment and use of a formal change control procedure, including a Change Control Board

# Project Templates

**ORACLE® Projects** Diagnostics Home Logout Preferences Help

Setup Options Quick Entry

**Project Template Setup**  
\* Indicates required field

[Cancel](#) [Apply](#)

**Template Information**

Operating Unit: **Vision Services**

\* Name:

\* Long Name:

\* Number:

\* Organization:

Description:

Project Type:

Access Level:

Effective From:

Effective To:

**Setup Options** [Return to Top](#)

[Expand All](#) | [Collapse All](#)

Focus Option	Update	Enable
Setup		<input checked="" type="checkbox"/>
Project		<input checked="" type="checkbox"/>
Basic Information		<input checked="" type="checkbox"/>
Structures		<input checked="" type="checkbox"/>
Deliverables		<input checked="" type="checkbox"/>
Classifications		<input checked="" type="checkbox"/>
Organizations		<input checked="" type="checkbox"/>
Billing Accounts		<input checked="" type="checkbox"/>

Trusted sites



# Project Estimation & Approval

**ORACLE Projects**  
Project ABC HR Implementation (ABCHR101)

Project List | Diagnostics | Home | Logout | Preferences | Help

Project | Resources | Workplan | Control | Financial | Reporting

Budgets and Forecasts | Billing | Percent Complete | Tasks | Setup

Financial: Budgets and Forecasts >

**View Budget (Task Summary): Estimate**

Cost Version Number **1** Revenue Version Number **1**  
 Cost Version Name **Cost Estimates** Revenue Version Name **Revenue Estimates**

Actions: View Resource Summary [Go]

[Show Plan Summary](#)

**Budget Lines**

[Show Display Parameters](#)

View: Budget [Go] Personalize [Select to hide or show display parameter]

Select Project or Task: Adjust Edit Cost Edit Revenue View Resource Analysis [Go] Export

[Expand All](#) | [Collapse All](#)

Select Focus Outline Number	Project or Task Name	Effort	Cost	Revenue	Margin	Margin %
0	Professional Services-Financial	3101	270,000.00	370,000.00	100,000.00	27.03
0	Professional Services-Financial					
1	Business Requirement Definition	728	22,500.00	89,420.24	66,920.24	74.84
2	Operations Analysis	280	28,125.00	34,392.40	6,267.40	18.22
3	Solution Design	764	84,375.00	93,842.12	9,467.12	10.09
4	Build	1009	101,250.00	113,035.54	11,785.54	10.43
5	Production	320	33,750.00	39,309.70	5,559.70	14.14

**TIP** Amounts are listed in Project Currency: USD. Effort amounts are from cost version. To edit the plan version, you must first unlock it on the Maintain Budget Versions page.

**Budget, Current Baseline Budget, and Original Baseline Budget**

**Cumulative Cost by Period**

Legend: Budget (blue), Current Budget (light blue), Original Budget (green)

320,000

**Effort by Task**

Legend: Budget (dark blue), Current Budget (light blue), Original Budget (green)

Business

# Project Baselines

The screenshot displays the Oracle Projects web interface for the 'Project Procurement Initiative (A101)'. The navigation menu includes Project, Resources, Workplan, Control, Financial, and Reporting. The 'Workplan' section is active, showing 'Published Versions' for 'Professional Services'.

**Maintain Versions**

**Unpublished Versions**

You must lock working workplan versions before you can update their structure or tasks. Select Rework to update submitted, approved, or rejected workplan versions.

Select Version: [View Workplan Cost](#) [Delete](#)

Select Version Number	Version Name	Scheduled Start	Scheduled Finish	Status	Current	Publish	Rework	Change Control	Update Work Breakdown Structure	Update Tasks	Details
<input type="radio"/> 1	<a href="#">Procurement Initiative V9</a>	01-Aug-2006	31-Dec-2008	Working	<input checked="" type="checkbox"/>						

**Published Versions** [Return to Top](#)

Select Version: [View Workplan Cost](#) [Set Baseline](#)

Select Version Number	Version Name	Scheduled Start	Scheduled Finish	Published By	Publish Date and Time	Baseline	Details
<input type="radio"/> 8	<a href="#">Professional Services V8</a>	01-Aug-2006	31-Dec-2008	<a href="#">Bowler, Mr. John</a>	26-Jun-2007 22:28:28	No	
<input type="radio"/> 7	<a href="#">Professional Services V7</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	30-Jan-2007 15:30:55	No	
<input type="radio"/> 6	<a href="#">Professional Services V6</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	13-Nov-2006 12:13:58	No	
<input type="radio"/> 5	<a href="#">Professional Services V5</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	10-Nov-2006 12:49:47	No	
<input type="radio"/> 4	<a href="#">Professional Services V4</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	17-Oct-2006 09:00:52	No	
<input type="radio"/> 3	<a href="#">Professional Services V3</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	09-Oct-2006 10:25:18	No	
<input type="radio"/> 2	<a href="#">Professional Services V2</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	22-Sep-2006 11:06:20	Yes	
<input type="radio"/> 1	<a href="#">Professional Services</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	21-Sep-2006 10:33:18	No	

[Return to Tasks](#)

Project Resources Workplan Control Financial Reporting Project List Diagnostics Home Logout Preferences Help

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# Change Management

ORACLE® Projects  
Project Procurement Initiative (A101)

Project List Diagnostics Home Logout Preferences Help

Project Resources Workplan Control Financial Reporting

Issues Change Requests Change Orders

Change Orders

Create  Go

Views

View All Draft and Open Change Orders (C) Go Personalize

Advanced Search

Select Change Orders: Change Owner | Export

Select All | Select None

Select	Change Order	Summary	Type	Created By	Owner	Priority	Progress Status	Days Until Due	Days Since Updated	Open Actions	People Effort	Estimated Burdened Cost	Cost	Status	Classification	Update Details	Update Impact	Implement Impact	Delete
<input type="checkbox"/>	<a href="#">Budget:CO (1)</a>	Automated Conversion Tool needs to be licensed.	Budget Revision	<a href="#">Marlin, Ms. Amy</a>	<a href="#">Amy Marlin</a>	High		-263	263	<a href="#">0</a> <a href="#">0</a>		0.00	5,000.00	<a href="#">External Approve</a>	Project				
<b>Total</b>										<b>0</b>		<b>0.00</b>	<b>5,000.00</b>						

Amounts are listed in project currency: USD

Project Resources Workplan Control Financial Reporting Project List Diagnostics Home Logout Preferences Help

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# Challenge #2

- Subjective Estimates of Project Time and Cost
  - Formal Estimates of cost or time are demanded before requirements are fully defined
  - Historical Data is seldom available for calibration of estimates
  - Conservative estimates may be overruled and replaced by aggressive estimates
  - New requirements are added, but the original estimate can not be changed

**RESULT: Unrealistic Schedules and Budgets**



# Best Practice:

## *Estimating*

- Standard, quantified estimating process based on actual costs and time of prior projects
- If actuals are not tracked, then industry guidelines may be used

# Copy Past Project Actual Performance

ORACLE®
Project List | Diagnostics | Home | Logout | Preferences | Help

Projects
Project Procurement Initiative (A101)

Project
Resources | Workplan | Control | Financial | Reporting

Tasks
| Deliverables | Resource Usage | Setup

Workplan: Tasks > Update Tasks > Update Work Breakdown Structure >

### Copy External

\* Indicates required field

You can change the values for Project Name, Structure Name, Structure Version Name and Task Name to copy tasks from outside of this structure version.

\* Project Name

\* Structure Name

\* Structure Version Name

Task Name

Copy  Selected Task and all Subtasks  
 Selected Task Only  
 Entire Version

Copy Dependencies  
 Copy Task Assignments

People

Financial Elements

Equipment

Material Items

**TIP** The system copies rates and amounts only when the source and the destination projects both share a centralized planning resource list, share the same time phase setting, and have Plan Amounts In Multiple Currencies either enabled or disabled. Otherwise, it recalculates rates and amounts in the destination project.

Paste Selection  As a Peer Task  As a Subtask

Prefix

### Placement

Select the position where you want to move the tasks.

[Expand All](#) | [Collapse All](#)

⊕

Select	Focus	Outline Number	Task Number	Task Name
<input type="radio"/>		0	102889	Professional Services
<input checked="" type="radio"/>	⊕	1	1.0	Business Requirements Definition
<input checked="" type="radio"/>	⊕	2	2.0	Operations Analysis

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# Integrated Time Keeping

Cancel Save Continue

Show Accrual Balances

Period June 04, 2007 - June 10, 2007~

Comments

Overriding Approver

Template Project Assignments  Overwrite Entry **Apply Template**

Project	Task	Type	Mon, Jun 04	Tue, Jun 05	Wed, Jun 06	Thu, Jun 07	Fri, Jun 08	Sat, Jun 09	Sun, Jun 10	Total	Delete	Additional Details
A101		Professional - (\$	5.59	5.59	5.59	5.59	5.59			27.95		
FP101		Professional - (\$	2	1	1					4		
CP101		Professional - (\$			2	2	2			6		
TM101		Professional - (\$			2	2	2			6		
										0		
										0		
										0		
<b>Add Another Row</b>	<b>Recalculate</b>		<b>7.59</b>	<b>6.59</b>	<b>10.59</b>	<b>9.59</b>	<b>9.59</b>	<b>0</b>	<b>0</b>	<b>43.95</b>		

Template Name  **Save as a Template**



# Challenge #3

- Lack of Proactive Risk Management
  - Project risks are not proactively identified, analyzed, and mitigated
  - Problems are addressed reactively, causing schedules and budgets to be exceeded

**RESULT: Schedule Slippage**

**RESULT: Budget Overruns**

**RESULT: Excessive Staff Overtime/Burnout**





# Best Practice:

## *Risk Management*

- Utilize integrated and proactive Risk Management
  - Develop and publish the Risk Mgmt Plan
  - Educate the entire project team on the benefits of performing risk management
- Integrate identified risks to scope, schedule and cost
- Maintain the Risk Log
  - Make risk data available to everyone
  - Report on risk trends in your monthly status

# Project Exception Reporting

## Exceptions

Save Search

Refresh Key Performance Areas

### Key Performance Area Summary

#### Search

Note that the search is case insensitive

Views

Key Performance Area

Exception Status

Performance Rule

Measure

Included in Scoring

Go Clear

#### Export

Key Performance Area	Performance Rule	Measure	Exception Status	Value	Threshold		Weighting	Included in Scoring	Last Recorded Date
					From	To			
Financial	<a href="#">At Risk Revenue</a>	ITD Revenue at Risk		106120	1001	99999999999	90	Yes	24-Aug-2007 08:16:45
Schedule	<a href="#">Schedule Performance Index (SPI)</a>	ITD Schedule Performance Index		0.8538	-99999	0.95	75	Yes	24-Aug-2007 08:16:45
Financial	<a href="#">Percent Money Spent</a>	ITD % Spent		65.0403	51	75	30	Yes	24-Aug-2007 08:16:45
Health	<a href="#">ITD Margin % Variance</a>	ITD Margin % Variance		-1.6912	-2	-1	50	Yes	24-Aug-2007 08:16:45
Financial	<a href="#">Cost Performance Index (CPI)</a>	ITD Cost Performance Index		1.3128	1	999999	10	Yes	24-Aug-2007 08:16:45
Financial	<a href="#">Nonbillable Cost % of Total Cost</a>	ITD Nonbillable Cost % of Total Cost		0	0	5	10	Yes	24-Aug-2007 08:16:45
Financial	<a href="#">Percent Complete</a>	ITD % Complete		14.1284	0	40	10	Yes	24-Aug-2007 08:16:44
Health	<a href="#">ITD Outstanding Receivables</a>	ITD Outstanding Receivables		0	0	1000	10	Yes	24-Aug-2007 08:16:45

# Change Management

The screenshot displays the Oracle Projects Change Management interface. At the top, there are navigation tabs for Project, Resources, Workplan, Control, Financial, and Reporting. Below these, there are sub-tabs for Issues, Change Requests, and Change Orders. The main content area shows a 'Change Orders' section with a 'Create' dropdown and a 'Go' button. Below this is a 'Views' section with a dropdown menu set to 'All Draft and Open Change Orders (C)' and a 'Personalize' button. There is also an 'Advanced Search' button. The 'Select Change Orders' section includes buttons for 'Change Owner' and 'Export', along with 'Select All' and 'Select None' options. The main table lists change orders with columns for Select, Change Order, Summary, Type, Created By, Owner, Priority, Progress Status, Days Until Due, Days Since Updated, Open Actions, People Effort, Estimated Burdened Cost, Cost, Status, Classification, Update Details, Update Impact, Implement Impact, and Delete. A single change order is visible with a summary of 'Automated Conversion Tool needs to be licensed.' and a total cost of 5,000.00. The footer includes 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'

Select	Change Order	Summary	Type	Created By	Owner	Priority	Progress Status	Days Until Due	Days Since Updated	Open Actions	People Effort	Estimated Burdened Cost	Cost	Status	Classification	Update Details	Update Impact	Implement Impact	Delete
<input type="checkbox"/>	<a href="#">Budget:CO (1)</a>	Automated Conversion Tool needs to be licensed.	Budget Revision	<a href="#">Marlin, Ms. Amy</a>	<a href="#">Amy Marlin</a>	High		-263	263	0	0	0.00	5,000.00	<a href="#">External Approve</a>	Project				
<b>Total</b>										<b>0</b>	<b>0.00</b>	<b>5,000.00</b>							

Amounts are listed in project currency: USD

# Project Status Reporting: Managing Risks from Inception to Conclusion

The screenshot displays the Oracle Projects web application interface. The main header shows 'ORACLE Projects' and 'Project Procurement Initiative (A101)'. The navigation menu includes 'Project', 'Resources', 'Workplan', 'Control', 'Financial', and 'Reporting'. The 'Reporting' tab is active, showing 'Status Reports' and 'Review and Publish: Customer' options. The 'Project Information' section lists details such as Project Name (Procurement Initiative), Project Manager (Marlin, Ms. Amy), Project Number (A101), Start Date (01-Aug-2006), Organization (Services-East), Finish Date (31-Dec-2008), Project Type (Time and Materials), and Status (Approved). The 'General Progress' section shows a reported status of 'On Track' with a report start date of 05-Jun-2007 and an end date of 05-Jul-2007. The 'Published Reports' section is currently empty, displaying a message 'No results found.' The 'Compare to Baseline Version Gantt' section includes a table with columns for 'Outline Number', 'Task Name', 'Scheduled Start', 'Scheduled Finish', and quarterly data for the years 2006, 2007, 2008, and 2009. A Gantt chart for 'Professional Services V8' shows a task duration from 01-Aug-2006 to 31-Dec-2008.

**Project Information**

Project Name	Procurement Initiative	Project Manager	Marlin, Ms. Amy
Project Number	A101	Start Date	01-Aug-2006
Organization	Services-East	Finish Date	31-Dec-2008
Project Type	Time and Materials	Status	Approved

**General Progress**

Reported Status	On Track	Report Start Date	05-Jun-2007
Publish Date and Time		Report End Date	05-Jul-2007

**Published Reports**

✓ TIP The table below displays the last five published reports.

Report Start Date	Report End Date	Reported Status	Brief Overview	Reported By	Publish Date and Time
No results found.					

**Compare to Baseline Version Gantt**

✓ TIP date format example: 21-Sep-2007

Outline Number	Task Name	Scheduled Start	Scheduled Finish	2006		2007		2008		2009				
				Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1
0	Professional Services V8	01-Aug-2006	31-Dec-2008	[Gantt bar spanning from 01-Aug-2006 to 31-Dec-2008]										



# Challenge #4

- Poor Project Communication
  - Lack of stakeholder analysis results in inadequate communication of project status and issues
  - Stakeholder needs and expectations are not managed appropriately
  - Resolving misunderstandings takes time away from planned project activities

**RESULT: Can affect any part of your project!**



# Best Practice:

## *Project Communications*

- Plan project communications at project starts
- Perform stakeholder analysis to identify their expectations and communication needs
- Create a Communications Management Plan
  - Project Communications Plan
  - Stakeholder Communications Plan

# Planned vs. Actual Delivery Reporting

View

Select Resource:   View   |

Expand All | Collapse All

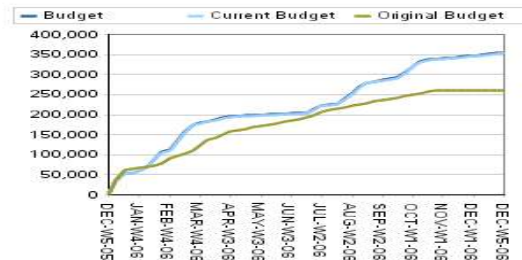
Select Focus	Resource	Effort	Raw Cost	Burdened Cost	Original Budget Cost	Original Budget Cost Variance %	Current Budget Cost	Current Budget Cost Variance %
<input checked="" type="radio"/>	▼ Consulting RBS	2407	413,034.25	355,106.79	260,959.29	26.51	353,402.79	0.48
<input type="radio"/>	▶ Management and Budget	88	3,080.00	6,160.00			5,600.00	9.09
<input type="radio"/>	▶ Services-Central	250	8,240.00	14,300.00	34,945.00	-144.37	14,300.00	0
<input type="radio"/>	▼ Services-East	1371	363,324.25	266,024.67	170,151.79	36.04	265,667.17	0.13
<input type="radio"/>	Services-East	1042	338,215.50	221,560.61	170,151.79	23.2	221,560.61	0
<input type="radio"/>	▼ Business Analyst	144	14,700.00	26,276.25			25,918.75	1.36
<input type="radio"/>	Business Analyst	144	14,700.00	26,276.25			25,918.75	1.36
<input type="radio"/>	▼ Consultant	185	10,408.75	18,187.81			18,187.81	0
<input type="radio"/>	Consultant	185	10,408.75	18,187.81			18,187.81	0
<input type="radio"/>	▼ Services-West	698	38,390.00	68,622.12	55,862.50	18.59	67,835.62	1.15
<input type="radio"/>	Services-West							
<input type="radio"/>	▼ Consultant	698	38,390.00	68,622.12	36,200.00	47.25	67,835.62	1.15
<input type="radio"/>	Look, Jim	258	14,190.00	25,364.62			24,578.12	3.1
<input type="radio"/>	Warner, Mrs. Dana	440	24,200.00	43,257.50	36,200.00	16.32	43,257.50	0
<input type="radio"/>	▼ Project Administrator				19,662.50			
<input type="radio"/>	Look, Jim				19,662.50			
<input type="radio"/>	Vision Services							

Select Resource:   View   |

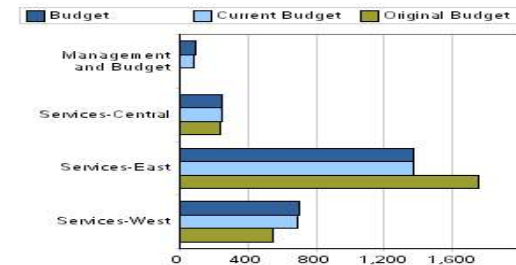
**TIP** Amounts are listed in Project Currency: USD. Effort amounts are from cost version. To edit the plan version, you must first unlock it on the Maintain Budget Versions page.

## Budget, Current Baseline Budget, and Original baseline Budget

Cumulative Cost By Period



Effort By Resource



# Automated Workflow and Status Reporting

**ORACLE** Projects Project List Diagnostics Home Logout Preferences Help

Project Resources Workplan Control Financial Reporting

Home Overview Directory Attachments Relationships Setup

### Project Setup

\* Indicates required field

Operating Unit **Vision Services**

\* Name Procurement Initiative

\* Long Name Procurement Initiative

\* Number A101

\* Organization Services-East

Project Type Time and Materials

Status **Approved**

Funding Approval Status

Description

Public Sector  No  Yes

Access Level Enterprise

Priority Medium

City Boston

State / Region MA

Country United States

Dates				
	Start Date	Finish Date	Duration (Days)	As Of Date
<b>Project</b>	01-Aug-2006	31-Dec-2008		
<b>Target</b>	01-Aug-2006	31-Dec-2008		
<b>Transaction</b>	01-Aug-2006	31-Dec-2008		
<b>Scheduled</b>	01-Aug-2006	31-Dec-2008	884	26-Jun-2007
<b>Baseline</b>	01-Aug-2006	31-Dec-2008	884	07-Jun-2007
<b>Actual</b>	01-Aug-2006			

TIP date format example: 22-Aug-2007



# Action Assignments (in addition to Task Assignments)

Welcome, Amy, to Team Member Home.

Shortcuts

**General** | **Tasks And Deliverables** | **Issues And Changes**

## Assigned Actions

### Update Deliverable Actions

Project	Object	Reference	Action	Due Date	Owner	Take Action
<a href="#">Engineering + Construction-100(E&amp;C-100)</a>	Issue	<a href="#">Design:Iss (2)</a>	Amy, please authorize batch replacement.		<a href="#">Amy Marlin</a>	
<a href="#">Engineering + Construction-100(E&amp;C-100)</a>	Issue	<a href="#">Env:Iss (1)</a>	Amy, could you possibly highlight the importance of the on site procedures to the supplier as I dont think their drivers are fully aware of the details.		<a href="#">Amy Marlin</a>	

## Owned Work

Project	Object	Reference	Subject	Priority	Due Date	Status	Progress Status	Related Task
<a href="#">Engineering + Construction-100(E&amp;C-100)</a>	Task	<a href="#">Field Verify Clearances (2.2)</a>			10-Jun-2006	Not Started		
<a href="#">Engineering + Construction-100(E&amp;C-100)</a>	Task	<a href="#">Design Review and Approval (2.6)</a>			01-Aug-2006	Not Started		
<a href="#">Engineering + Construction-100(E&amp;C-100)</a>	Task	<a href="#">Procedure Review (4.2)</a>			20-Oct-2006	Not Started		
<a href="#">Engineering + Construction-100(E&amp;C-100)</a>	Task	<a href="#">Staffing Plans (4.3)</a>			30-Oct-2006	Not Started		
<a href="#">Engineering + Construction-100(E&amp;C-100)</a>	Task	<a href="#">Staging Area Assigned (4.4)</a>			15-Nov-2006	Not Started		

## Open Notifications

Subject	Sent	Due	Priority
No results found.			

# Project & Stakeholder Communication and Management

**ORACLE** Projects  
Project ABC-Financials Implementation (ABC)

Project List Diagnostics Home Logout Preferences Help

Project Resources Workplan Control Financial Reporting

Performance Exceptions **Status Reports** Setup

## Status Reports

The table below represents the latest published reports only.

Report Type ▲	Reported Status	Brief Overview	Report Start Date	Report End Date	Reported By	Next Report End Date	Maintain Status Reports	Report History
Customer		Additional technical resources are required and have been verbally approved by the steering committee. Current area we need to focus our attention are the migration scripts in time for the pilot run.	06-Oct-2007	06-Oct-2007	<a href="#">Bowler, Mr. John</a>			
Healthcheck			03-Sep-2007	28-Sep-2007	<a href="#">Bowler, Mr. John</a>			
Internal Management		Since last report we had to face several Customer complexities which created problems. What's more a Change Request is under evaluation. CR High impact since all the Analysis and Design phase have to be evaluated and analyzed.	24-Sep-2007	28-Sep-2007	<a href="#">Bowler, Mr. John</a>			
Team		This weeks planned team status meeting has been pushed out by one day. Please ensure that you all update your progress status. Need to prep for client review meeting for sign off on designs.	01-Aug-2003	01-Aug-2003	<a href="#">Marlin, Ms. Amy</a>			



# Challenge #5

- Lack of Project Performance Measures
  - No knowledge of where projects are relative to where they should be at various points in time
  - Troubled projects not identified in time to remedy them
  - Appropriate corrective actions not identified

**RESULT: Unseen Schedule Slippage**

**RESULT: Budget Overruns**

**RESULT: Poor Product/Service Quality**



# Best Practice:

## *Performance Measurement*

- Use of standardized project performance measures
  - Establishment of project baselines (schedule, effort, product)
- Use of Earned Value Management (EVM)
  - Even for small projects

# Project Performance Management

Effort		
<a href="#">Export</a>		
Indicator	PTD	ITD
Current Budget People Effort	0	2840
People Effort	0	3336
% Spent People Effort		117.46
Forecast People Effort	0	3000
Forecast People Effort Variance %		5.63

Cost		
<a href="#">Export</a>		
Indicator	PTD	ITD
Original Budget Burdened Cost	0.00	270,000.00
Current Budget Burdened Cost	0.00	270,000.00
Burdened Cost	0.00	211,064.78
Total Committed Cost		
Burdened Cost + Committed Cost	0.00	211,064.78
ETC		108,935.22
Forecast Burdened Cost	0.00	320,000.00
Forecast Cost Variance %		⊗ 18.52

Revenue		
<a href="#">Export</a>		
Indicator	PTD	ITD
Original Budget Revenue	0.00	370,000.00
Current Budget Revenue	0.00	370,000.00
Accrued Revenue	0.00	338,700.00
Forecast Revenue	0.00	400,000.00
Forecast Revenue Variance	0.00	30,000.00

Earned Value	
<a href="#">Export</a>	
Indicator	ITD
Planned Value	270,000.00
Actual Cost	211,064.78
Physical % Complete	93.8
Earned Value	253,260.00
% Spent	✔ 78.17
Earned Value Cost Variance	42,195.22
Earned Value Schedule Variance	<16,740.00>
Schedule Performance Index	⊗ .94
Cost Performance Index	✔ 1.2
To Complete Performance Index	.28
<a href="#">Export</a>	

Billability		
<a href="#">Export</a>		
Indicator	PTD	ITD
Billable Cost	0.00	211,064.78
Billable Cost % of Total Cost		100
Nonbillable Cost	0.00	0.00
Billable People Effort	0	3336
Billable People Effort %		100
Nonbillable People Effort	0	0
Next Invoice Date		28-APR-2006

Billing and Collections	
<a href="#">Export</a>	
Indicator	ITD
Billed Amount	0.00
Outstanding Receivables	✔ 0.00
Past Due Receivables	0.00
Unearned Revenue	0.00
Unbilled Receivables	0.00
Next Invoice Date	28-APR-2006

# Project Exception Management

## Exceptions

Save Search

Refresh Key Performance Areas

### Key Performance Area Summary

#### Search

Note that the search is case insensitive

Views

Key Performance Area

Exception Status

Performance Rule

Measure

Included in Scoring

Go Clear

#### Export

Key Performance Area	Performance Rule	Measure	Exception Status	Value	Threshold		Weighting	Included in Scoring	Last Recorded Date
					From	To			
Financial	<a href="#">At Risk Revenue</a>	ITD Revenue at Risk		106120	1001	99999999999	90	Yes	24-Aug-2007 08:16:45
Schedule	<a href="#">Schedule Performance Index (SPI)</a>	ITD Schedule Performance Index		0.8538	-99999	0.95	75	Yes	24-Aug-2007 08:16:45
Financial	<a href="#">Percent Money Spent</a>	ITD % Spent		65.0403	51	75	30	Yes	24-Aug-2007 08:16:45
Health	<a href="#">ITD Margin % Variance</a>	ITD Margin % Variance		-1.6912	-2	-1	50	Yes	24-Aug-2007 08:16:45
Financial	<a href="#">Cost Performance Index (CPI)</a>	ITD Cost Performance Index		1.3128	1	999999	10	Yes	24-Aug-2007 08:16:45
Financial	<a href="#">Nonbillable Cost % of Total Cost</a>	ITD Nonbillable Cost % of Total Cost		0	0	5	10	Yes	24-Aug-2007 08:16:45
Financial	<a href="#">Percent Complete</a>	ITD % Complete		14.1284	0	40	10	Yes	24-Aug-2007 08:16:44
Health	<a href="#">ITD Outstanding Receivables</a>	ITD Outstanding Receivables		0	0	1000	10	Yes	24-Aug-2007 08:16:45

# Project Baseline Management

**ORACLE Projects**  
Project Procurement Initiative (A101)

Project List | Diagnostics | Home | Logout | Preferences | Help

Project | Resources | Workplan | Control | Financial | Reporting

Tasks | Deliverables | Resource Usage | Setup

Workplan: Tasks >

Published Versions

Maintain Versions

**Unpublished Versions**

You must lock working workplan versions before you can update their structure or tasks. Select Rework to update submitted, approved, or rejected workplan versions.

Select Version: [View Workplan Cost](#) [Delete](#)

Select Version Number	Version Name	Scheduled Start	Scheduled Finish	Status	Current	Publish	Rework	Change Control	Update Work Breakdown Structure	Update Tasks	Details
<input type="radio"/> 1	<a href="#">Procurement Initiative V9</a>	01-Aug-2006	31-Dec-2008	Working	<input checked="" type="checkbox"/>						

**Published Versions** [Return to Top](#)

Select Version: [View Workplan Cost](#) [Set Baseline](#)

Select Version Number	Version Name	Scheduled Start	Scheduled Finish	Published By	Publish Date and Time	Baseline	Details
<input type="radio"/> 8	<a href="#">Professional Services V8</a>	01-Aug-2006	31-Dec-2008	<a href="#">Bowler, Mr. John</a>	26-Jun-2007 22:28:28	No	
<input type="radio"/> 7	<a href="#">Professional Services V7</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	30-Jan-2007 15:30:55	No	
<input type="radio"/> 6	<a href="#">Professional Services V6</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	13-Nov-2006 12:13:58	No	
<input type="radio"/> 5	<a href="#">Professional Services V5</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	10-Nov-2006 12:49:47	No	
<input type="radio"/> 4	<a href="#">Professional Services V4</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	17-Oct-2006 09:00:52	No	
<input type="radio"/> 3	<a href="#">Professional Services V3</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	09-Oct-2006 10:25:18	No	
<input type="radio"/> 2	<a href="#">Professional Services V2</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	22-Sep-2006 11:06:20	Yes	
<input type="radio"/> 1	<a href="#">Professional Services</a>	01-Aug-2006	31-Dec-2008	<a href="#">Marlin, Ms. Amy</a>	21-Sep-2006 10:33:18	No	

[Return to Tasks](#)

Project Resources Workplan Control Financial Reporting Project List Diagnostics Home Logout Preferences Help

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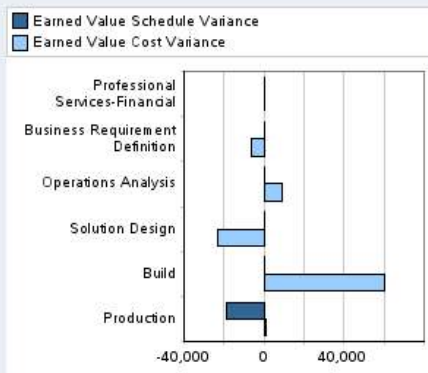
Trusted sites

# Earned Value Management

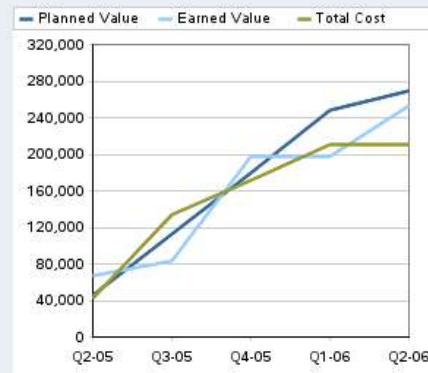
Select Focus	Outline Number	Project or Task Name (Number)	Planned Value	Physical % Complete	Earned Value	Earned Value Schedule Variance	Schedule Performance Index	Total Current Budget Burdened Cost
+	0	Professional Services-Financial (36878)	270,000.00	93.8	253,260.00	<16,740.00>	0.94	270,000.00
+	1	Business Requirement Definition (1.0)	22,500.00	100	22,500.00	0.00	1	22,500.00
	1	Business Requirement Definition (1.0)	22,500.00					22,500.00
+	1.1	Scope and Requirements Definition(1.1)		100				
	1.1.1	Business Requirements (Detailed) (1.1.1)		100				
+	2	Operations Analysis(2.0)	28,125.00	100	28,125.00	0.00	1	28,125.00
	2	Operations Analysis(2.0)	28,125.00					28,125.00
	2.1	Fit/Gap Requirement Analysis(2.1)		100				
+	3	Solution Design(3.0)	84,375.00	100	84,375.00	0.00	1	84,375.00
+	4	Build(4.0)	101,250.00	100	101,250.00	0.00	1	101,250.00
	5	Production(5.0)	33,750.00	45	15,187.50	<18,562.50>	0.45	33,750.00

Export

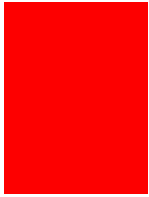
Schedule and Cost Performance by Task



Cumulative Planned Value, Earned Value, and Actual Cost







# QA

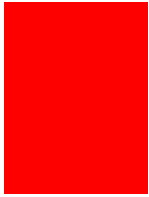
QUESTIONS  
ANSWERS

# For More Information

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# THANK YOU



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