**Earned Value Management (EVM) Reports and Performance Metrics**

**Project:** Odoo ERP Integration for Safaricom Telecom  
**Version:** 1.0  
**Date:** [Insert Date]

**A. Purpose**

To provide a quantitative analysis of project performance by integrating scope, schedule, and cost metrics, enabling proactive decision-making and early detection of deviations.

**B. Key EVM Metrics**

| **Metric** | **Definition** | **Formula** | **Interpretation** |
| --- | --- | --- | --- |
| **Planned Value (PV)** | Budgeted cost for work scheduled to be completed by a given date | PV = Budgeted Cost × Planned % Complete | Baseline cost for scheduled work |
| **Earned Value (EV)** | Budgeted cost for work actually completed | EV = Budgeted Cost × Actual % Complete | Value of work performed |
| **Actual Cost (AC)** | Actual cost incurred for work performed | Sum of actual expenditures | Real spending |
| **Schedule Variance (SV)** | Difference between EV and PV | SV = EV – PV | Positive = ahead, Negative = behind schedule |
| **Cost Variance (CV)** | Difference between EV and AC | CV = EV – AC | Positive = under budget, Negative = over budget |
| **Schedule Performance Index (SPI)** | Efficiency of schedule utilization | SPI = EV / PV | >1 = ahead, <1 = behind schedule |
| **Cost Performance Index (CPI)** | Cost efficiency of work performed | CPI = EV / AC | >1 = under budget, <1 = over budget |

**C. EVM Reporting**

| **Report Element** | **Description** | **Frequency** | **Audience** |
| --- | --- | --- | --- |
| EVM Summary Dashboard | Visual summary of PV, EV, AC, SV, CV, SPI, CPI | Weekly / Monthly | Project Manager, PMO |
| Detailed Variance Analysis | Root cause analysis of schedule and cost deviations | Monthly | Steering Committee |
| Forecasting Report | Estimate at Completion (EAC), Variance at Completion (VAC) | Monthly | Executive Sponsors |
| Corrective Action Plan | Recommendations to address variances | As needed | Project Team |

**D. Sample EVM Data Table**

| **Work Package** | **Budgeted Cost** | **Planned % Complete** | **Actual % Complete** | **PV (KES)** | **EV (KES)** | **AC (KES)** | **SV (KES)** | **CV (KES)** | **SPI** | **CPI** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Billing Module Dev | 10,000,000 | 50% | 40% | 5,000,000 | 4,000,000 | 4,500,000 | -1,000,000 | -500,000 | 0.8 | 0.89 |
| CRM Module Customization | 7,000,000 | 60% | 65% | 4,200,000 | 4,550,000 | 4,300,000 | 350,000 | 250,000 | 1.08 | 1.06 |

**E. Tools & Techniques**

* Use MS Project, Primavera P6, or specialized EVM software for data tracking.
* Integrate financial and schedule data from ERP and project management systems.
* Visualize EVM metrics using Power BI, Tableau, or Excel dashboards.