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Product

Overview.

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# PRODUCT OVERVIEW

# TECHNOLOGY STACK

Primer is built in Microsoft Fabric, a premium cloud solution for data analytics, this offers the following benefits.

* Scalability: Microsoft Fabric provides a scalable environment that can dynamically adjust to the workload requirements of Primer. This is crucial for data warehousing and analytics services, which often need to scale resources up or down based on the volume of data processing and the number of users.
* Integration and Compatibility: Primer is designed to integrate seamlessly with Primavera P6, among other systems. Microsoft Fabric offers a comprehensive set of integration tools and services that facilitate smooth data flow and interoperability between Primer and these external systems, ensuring efficient data ingestion, processing, and reporting.
* Security and Compliance:Microsoft Fabric offers robust security features that are essential for data services, including data encryption, access control, and compliance tools. These features help Primer ensure the security and integrity of its clients' data, which is particularly important given the sensitivity of project management data.
* Reliability and Availability: By leveraging Microsoft Fabric, Primer can offer high availability and reliability of its services, ensuring that data and analytics services are accessible when needed. Microsoft Fabric's infrastructure is designed to minimize downtime and provide disaster recovery capabilities.
* Development and Deployment Efficiency: Microsoft Fabric provides a set of tools and services that streamline the development, testing, and deployment of cloud-based applications. For Primer, this means quicker deployment times for custom solutions, easier updates and maintenance, and the ability to rapidly deploy new features or services to meet the evolving needs of its clients.
* Cost Efficiency: Utilizing Microsoft Fabric can lead to cost efficiencies through managed services, which reduce the need for extensive in-house infrastructure and personnel to manage data operations. This allows Primer to focus on its core services while benefiting from the economies of scale that Microsoft's cloud infrastructure offers. In summary, Microsoft Fabric supports Primer's objectives of providing a robust, scalable, and secure DAaaS product tailored to the needs of companies using Primavera P6, enabling efficient data management and analytics services in the cloud.

# ARCHITECTURE

Data is ingested via the P6 API into a Medallion Architecture

* Bronze layer - Raw data for staging
* Silver transforms & clean data into tables for modelling and specific use cases
* Gold layer is for enriched and modelled data

## Medallion Architecture Layers

The medallion architecture, especially within data warehousing and analytics contexts like that of Primer, typically comprises three layers: the bronze layer, the silver layer, and the gold layer. Each layer serves a distinct purpose, contributing to the overall efficiency and effectiveness of data management and analytics. Here’s a breakdown of the purpose of each layer:

### 🥉 Bronze Layer (Raw Data Layer)

* Purpose: This layer acts as the landing area for raw data collected from various sources. The primary purpose is to store data in its original, unmodified form. It ensures that there's a pristine copy of all ingested data, which can be useful for audit purposes, compliance, and to serve as a baseline for transformation processes.
* Characteristics: Data in the bronze layer is often diverse, spanning different formats and structures. It includes batch data, real-time streams, logs, files, and database snapshots. The data is not yet optimized for querying or analysis.

### 🥈 Silver Layer (Cleansed and Curated Data Layer)

* Purpose: The silver layer is where data is cleansed, processed, and transformed into a more usable format. This layer aims to standardize data, ensuring consistency across different data sets, and to apply business logic and transformations that make the data ready for analysis. It serves as a transitional stage where data is refined and enriched.
* Characteristics: Data in this layer is semi-processed. It might include deduplication, normalization, and the application of business rules. This layer ensures data quality and readiness for further analytics or business intelligence processes.

### 🥇 Gold Layer (Aggregated and Business-ready Data Layer)

* Purpose: The gold layer contains data that has been further aggregated, summarized, or otherwise transformed to directly support decision-making and analytics. The focus here is on deriving insights and supporting business intelligence applications. Data in this layer is often structured in a way that aligns closely with the organization's key performance indicators (KPIs) and analytical needs.
* Characteristics: This layer hosts highly refined data models, dashboards, and reports. It’s optimized for fast querying and analysis, often structured according to specific business domains or analytical functions. The data is reliable, consistent, and aligned with business semantics, making it most suitable for end-users like business analysts, data scientists, and decision-makers.

In summary, the medallion architecture’s three-layer approach systematically transforms raw data into business insights through a structured process of ingestion, cleansing, transformation, and aggregation. This ensures that data at each stage is suited for different purposes, from auditing and compliance at the bronze level to operational reporting and advanced analytics at the gold level. This architecture provides a scalable and flexible framework that supports a wide range of data analytics and business intelligence activities, central to the operations of platforms like Primer.

## Benefits of a Medallion Architecture

Utilizing a medallion architecture for Primer offers several compelling benefits which align closely with the core objectives of efficient project management and data analytics:

* End-to-End Data Management and Integration: The medallion architecture offers a comprehensive framework that covers all aspects of data management, from ingestion through python API to data warehousing and analytics. This ensures seamless data flow across different stages of data processing, facilitating better data governance and quality control.
* Flexibility and Scalability: By adopting this architecture, Primer provides a highly flexible solution that can be tailored to meet the specific needs of any project management office (PMO). It allows for the easy addition of new data sources, integration of advanced analytics, and scaling of data storage and processing capabilities as the needs of the organization grow.
* Enhanced Decision-Making with Advanced Analytics: The architecture enables the use of advanced analytics, including AI and machine learning, to predict outcomes, optimize resources, and detect anomalies. This empowers decision-makers with actionable insights, leading to more informed decisions and better project outcomes.
* Improved Efficiency and Cost Reduction: By automating and optimizing various aspects of project controls and data management, the medallion architecture helps in significantly reducing manual efforts and operational costs. This efficiency gain not only saves time but also repurposes costs towards more strategic initiatives, enhancing the overall productivity of the organization.
* Robust Data Warehousing and Business Intelligence: Primer leverages the medallion architecture to build a solid data warehousing solution that supports efficient data storage, quick retrieval, and sophisticated analysis. Coupled with expertly designed Power BI reports, it enables the delivery of meaningful insights and facilitates a data-driven culture within organizations.
* Customizable and Deployable Framework: The architecture offers a deployable framework that can be customized as per the specific requirements of a PMO. This bespoke approach ensures that organizations are not forced to adapt to a one-size-fits-all solution but can instead have a system that aligns with their unique project management methodologies and data analytics needs.

In summary, the medallion architecture underpinning Primer offers a holistic, scalable, and customizable framework for data management and analytics, poised to revolutionize how organizations approach project management and decision-making.

# REPORTING FEATURES

Primer's reporting capabilities are meticulously engineered to transform project management through innovation and technology, providing a suite of tools designed to optimize efficiency and decision-making. Here’s an enhanced overview, incorporating improvements and additional insights:

## Advanced Automated Reporting

Primer revolutionizes the way project data is managed by automating the reporting process. This innovation eradicates the need for manual data entry and dependence on disjointed Excel reports, significantly streamlining the scheduling and reporting processes. With this automated system, project teams can focus more on analysis and strategic activities rather than on tedious data compilation.

## Unmatched Visibility into Project Data

Primer offers instant access to critical Primavera P6 data, enabling project managers and teams to obtain vital information in real-time. This feature empowers proactive management and timely adjustments without waiting for planner-generated reports, ensuring that projects stay on track and within scope.

## Dynamic Customizable Filtering

With Primer, slicing through data becomes a highly personalized experience. Our customizable filtering options give decision-makers and project teams the flexibility to explore the data in ways most relevant to their specific needs. This powerful feature facilitates in-depth analysis and strategic planning, allowing users to focus precisely on the segments of data that matter most.

## Direct Access to Underlying Data

Bridging the gap between planning teams and decision-makers, Primer allows for seamless extraction of datasets from any part of the report. This capability ensures that users can easily access, analyse further, or share the specific data they need, promoting a culture of self-service business intelligence across the organization.

## Fully Customizable Solution

Unlike one-size-fits-all SaaS solutions, Primer offers a fully customizable platform tailored to meet the exact needs of your project and organization. Whether it’s integrating additional data sources, developing bespoke reports, rebranding, or creating client-facing documents, Primer is designed to adapt and evolve according to your requirements.

## Innovative Deployable Data Warehouse Framework

At its core, Primer is not just a reporting tool but a comprehensive data warehouse and business intelligence framework. Designed by leading Project Controls and Data experts with over two decades of experience in Primavera and data analytics, Primer serves as the foundation for your data transformation journey. It eliminates the need for extensive development work, saving thousands of hours and significantly accelerating the delivery of project controls and analytics capabilities.

## Premade Reports

Primer delivers three out of the box reports, aimed at providing project controls teams everything they need. These three reports are focused in the following areas.

1. Primer Quality - Quality & Schedule Integrity
2. Primer Portfolio - Portfolio Management
3. Primer Performance - Project & Resource Performance

# PRIMER'S REPORTS

Primer unveils a revolutionary suite of reports, meticulously designed to transform the landscape of project controls with cutting-edge schedule intelligence. These reports empower users with deep, actionable insights, elevating project management to new heights of precision and efficiency. Here’s a closer look at the distinct functionalities and enriched details of each report:

## Primer Quality

Project Schedule Integrity and Diagnostics

Objective: Aimed at elevating the dependability and authenticity of project schedules, this report undertakes thorough evaluations, weaving in DCMA schedule assessments among other sophisticated analytics. It's an invaluable asset for planning teams and managers, fostering superior, data-informed reporting practices.

Key Features:

* Schedule Quality Scoreboard: A dynamic tool offering an immediate glimpse into the vitality of your schedule, enabling swift identification of issues. It supports extensive customization, including project manager scoring, Work Breakdown Structure (WBS) categorization, and analysis over chosen time frames.
* DCMA 14-Point Schedule Analysis: A rigorous application of metrics designed to bolster schedule robustness and accuracy, adeptly addressing challenges like logical inconsistencies and undue delays.
* In-depth Scheduling Insights: Provides a comprehensive breakdown of scheduling elements including Relationship Logic, Leads & Lags, and Date Constraints, enriched with insights into Baseline Execution Indexing and the principles of Earned Value Management (EVM).

## Primer Performance

Objective: This report swiftly conveys detailed insights into project and workforce efficiency via a suite of advanced analytics, including Earned Value Management (EVM) and Baseline Execution Index (BEI). It's tailored for project managers, directors, and scheduling departments seeking granular performance data.

Key Features:

* Advanced Earned Value Management (EVM): Implements EVM principles for an all-encompassing performance overview, leveraging metrics such as EV, SPI, CPI, SV, & CV for precise cost and schedule management.
* Baseline Execution Indexing & Activity Delivery Insight: Enhances visibility into the delivery efficiency of activities relative to their baselines and schedules.
* Resource Allocation and Forecasting: Employs predictive analytics to assess current resource use and project future needs, aiming for optimal resource distribution and minimized waste.
* Milestone and Activity Variance Analysis: Offers exhaustive variance analysis for milestones and activities, ensuring adherence to project timelines.
* Float Erosion Monitoring: Tracks the ebb and flow of total and free float, providing critical insights into project performance and potential delays.

Collectively, these reports underscore Primer's commitment to leveraging sophisticated data analytics and AI for a scalable, tailor-made project control solution. With seamless Primavera P6 integration and broad platform compatibility, Primer establishes a gold standard for project management flexibility and effectiveness.

## Primer Portfolio

Objective: Crafted to deliver a panoramic view of global project portfolios at the executive level, this report caters to the strategic needs of C-suite executives and portfolio managers. It offers an overarching perspective on project planning, deliverables, and resource orchestration.

Key Features:

* Global Portfolio Overview: Aggregates and synthesizes data from myriad projects, showcasing a unified narrative of project health and trajectory across global operations.
* Financial Tracking and Insights: Delivers granular financial analyses, shining a light on project expenditures, including labor, materials, and beyond, utilizing P6 data for a comprehensive financial overview.
* Organizational Resource Demand Planning: Pinpoints organizational resource needs and availability, facilitating strategic deployment and optimization of personnel resources.
* Portfolio Risk Analytics: A deep dive into risk exposure, employing Primavera risk module data for informed strategic decision-making.
* Portfolio-Wide Cost Performance Analysis: A thorough examination of cost efficiency and project performance through the lens of CPI and SPI metrics, offering a portfolio-scale fiscal perspective.

# Primer Value

# Primer Quality

The Primer Quality Report is tailored for organizations striving for excellence in project scheduling and adherence to high-quality standards. In an environment where consistency across teams is paramount, and the accuracy of project timelines and budgets is critical, this report serves as a foundational tool. It addresses the core needs of achieving uniformity in scheduling practices, delivering projects on time and within budget, and complying with rigorous scheduling standards such as the DCMA 14-Point Analysis. By focusing on enhancing data precision and efficiency, the Primer Quality Report empowers project managers and teams with actionable insights, thereby reducing the occurrence of human errors, inviable issues, and planning inaccuracies that can derail project outcomes. It's designed for stakeholders who require a deep dive into the integrity and quality of their scheduling efforts, providing a clear path towards project success through detailed analytics and improvement recommendations.

### Target Audience

* **Project Managers and Schedulers**: Individuals responsible for creating, maintaining, and ensuring the accuracy of project schedules. They require tools to streamline their scheduling processes, minimize errors, and comply with standards like the DCMA 14-Point Analysis.
* **Quality Assurance Teams**: Dedicated to maintaining high standards across all project aspects, these teams look for inconsistencies, inaccuracies, and areas for improvement in project scheduling and planning.
* **Senior Management and Stakeholders**: Needing assurance that projects are planned and executed according to high-quality standards, they rely on detailed reports to make informed decisions about project direction and resource allocation.
* **Compliance Officers**: Responsible for ensuring that project scheduling and execution comply with internal and external standards, regulations, and best practices.

### Problems Addressed by Primer Reports for Each Target Audience

* **Project Managers and Schedulers**: Struggle with maintaining accurate and consistent schedules across multiple projects, leading to delays and budget overruns. Primer can streamline scheduling processes and improve accuracy.
* **Quality Assurance Teams**: Face challenges in identifying and correcting inaccuracies in project planning and execution. Primer provides detailed insights for targeted improvements.
* **Senior Management and Stakeholders**: Often lack real-time visibility into the quality of project planning and execution, making it difficult to make informed decisions. Primer offers comprehensive quality assessments.
* **Compliance Officers**: Need to ensure projects adhere to industry standards and best practices but lack efficient tools for evaluation. Primer facilitates compliance monitoring and reporting.

### Audience Insight

| **Needs & Jobs** | Gains | Pains |
| --- | --- | --- |
| Uniformity in scheduling across teams | Reduced distractions, streamlined problem-solving | Errors due to manual input |
| Timely project delivery within budget | Lowered stress, higher project success rates | Unnoticed issues in project schedules |
| Adherence to high scheduling standards | Empowered control over project timelines | Poor planning methodologies |
| Compliance with DCMA 14-Point Analysis | Enhanced data precision and efficiency | Inefficient and inaccurate data handling |
| Risk Prediction and Mitigation | Confidence in data reliability | Delays due to schedule mismanagement |
| Project Outcomes Prediction | Proactive management with accurate forecasts | Inconsistent scheduling practices |
| Resource Optimization | Efficient resource allocation, reduced wastage |  |
| Anomaly Detection | Early intervention in project deviations |  |
| Performance Tracking | Improved individual and team performance |  |
| Schedule Optimization | Optimized project timelines for efficiency |  |

### Proposition Enhancement

| **Gain Creators** | Pain Relievers | Products & Services |
| --- | --- | --- |
| Project quality scoring for accuracy | Error highlighting and guidance for correction | Schedule integrity checks |
| Elevated standards in planning and data | Minimization of schedule delays | Guidance for planning improvements |
| Simplification for ongoing project application | Targeting critical impact areas first for resolution |  |
| Real-time risk analysis and mitigation | Proactive risk management strategies | Risk Prediction and Mitigation services |
| Accurate project outcome forecasting | Enhanced decision-making with real-time data | Project Outcome Prediction tools |
| Resource utilization efficiency | Optimized resource allocation and use | Resource Optimization solutions |
| Anomaly detection for early problem-solving | Prevention of project failures | Anomaly Detection systems |
| Performance insights for better management | Improved adherence to budgets and schedules | Performance Tracking analytics |
| Project schedule optimizations | Accelerated project delivery without quality loss | Schedule Optimization consultancy |

### Key Value Propositions as a List

1. **Error Highlighting and Correction Guidance**: Offers tools and guidance for identifying and correcting scheduling errors, enhancing project accuracy and reliability.
2. **Risk Prediction and Mitigation Services**: Utilizes historical data and ongoing project metrics to forecast potential risks, enabling proactive management strategies.
3. **Project Outcome Prediction Tools**: Provides real-time data analysis to accurately forecast project outcomes, facilitating informed decision-making.
4. **Resource Optimization Solutions**: Analyses current resource usage to accurately predict future needs, ensuring efficient resource allocation and minimizing waste.
5. **Anomaly Detection Systems**: Identifies deviations in project progress or data, allowing for early intervention and problem-solving.
6. **Performance Tracking Analytics**: Monitors individual and team performance against project benchmarks, ensuring project timelines and budgets are adhered to.
7. **Schedule Integrity Checks**: Ensures project schedules are accurate, reliable, and adhere to DCMA 14-Point Analysis standards.
8. **Guidance for Planning Improvements**: Provides clear guidance to improve planning standards, reducing the possibility of schedule delays.
9. **Schedule Optimization Consultancy**: Recommends adjustments to improve project completion times, optimizing efficiency without compromising quality.
10. **Proactive Risk Management Strategies**: Empowers project managers with tools and strategies to manage and mitigate risks effectively, enhancing project success rates.

# Primer Portfolio

The Primer Portfolio Report is designed for decision-makers who require a top-level view of their entire project portfolios while maintaining the flexibility to drill down into specific areas such as risk, resources, performance, and spending. This report brings to light the critical need for open access to project data, free from the constraints of siloed information, and presents a simplified, easily accessible data presentation format. By providing insights into high-level risks and resource management across multiple projects, the report facilitates a strategic overview that helps in making informed decisions. The Primer Portfolio Report uniquely addresses the challenges of manual report generation and the lack of visibility across company or global portfolios, offering a customizable and automated solution that integrates seamlessly with existing project management systems like Primavera P6.

## Target Audience

* **Portfolio Managers**: Oversee multiple projects and require a comprehensive view of the entire project portfolio to assess overall performance, identify risks, and allocate resources effectively.
* **C-Level Executives**: Senior executives interested in strategic insights into project performance, risks, resources, and spending across the organization to guide corporate strategy and investment.
* **Financial Analysts and Controllers**: Need to understand how budgets are allocated and spent across projects and portfolios, looking for trends, anomalies, and opportunities for financial optimization.
* **HR Managers and Recruiters**: Require insights into project and portfolio-level resource demands to plan for current and future staffing needs, ensuring that recruitment efforts align with project requirements.

## Problems Addressed by Primer Reports for Each Target Audience

* **Portfolio Managers**: Experience difficulty in obtaining a holistic view of project portfolios, making it hard to assess overall performance and risks. Primer offers a unified dashboard for portfolio analysis.
* **C-Level Executives**: Require strategic insights into project and portfolio performance but are hindered by siloed and inaccessible data. Primer provides executive-level overviews and insights.
* **Financial Analysts and Controllers**: Struggle with tracking and forecasting spending across multiple projects due to fragmented data. Primer enables comprehensive financial analysis and visibility.
* **HR Managers and Recruiters**: Face challenges in aligning recruitment efforts with project demands due to lack of clear resource demand forecasting. Primer helps in planning resource allocation and future staffing needs.

## Audience Insight

| **Needs & Jobs** | Gains | Pains |
| --- | --- | --- |
| Comprehensive overview of project portfolios | Centralized access to project data | Fragmented data across projects |
| Insight into risk, resources, performance, and spend | Streamlined presentation of critical data | Manual compilation of reports in Excel |
|  | Proactive risk and cost awareness | Obscured view of organizational portfolios |
| Detailed analytics per country, project, department, manager | Efficient resource management across projects | Excessive licensing costs for stakeholders |
| Objective evidence of project outcomes | Automated reporting eliminates reliance on manual reports | Dependency on planning teams for updates |
|  | Strategic operational guidance | Time-consuming report creation |

## Proposition Enhancement

| **Gain Creators** | Pain Relievers | Products & Services |
| --- | --- | --- |
| Customizable, brand-aligned interface | Reduction of licensing expenses from other software | Portfolio Overview Viewing Tools |
| Automated, ready-to-use solutions | Facilitates bespoke presentation and analytics |  |
| Seamless Primavera P6 integration | Strategic insights for informed decision-making |  |
| Easy-to-access data with comprehensive filters | Swift identification and resolution of issues |  |
| Unique solution with minimal competition | Elimination of data silos |  |
| Intuitive data filtering, viewing, exporting, and sharing | Immediate access to critical data and insights |  |
| Adaptive functionality for diverse needs |  |  |
| Near real-time analytics and reporting |  |  |

## Key Value Propositions as a List

1. **Centralized Project Data Access**: Offers a platform where all project data is accessible in one place, eliminating the challenges of siloed information.
2. **Streamlined Data Presentation**: Delivers data in a simple, easily understandable format, directly addressing the pain of manual report creation.
3. **Portfolio Overview Viewing Tools**: Provides tools for top-level awareness and analysis of entire portfolios, enhancing visibility across the company or globally.
4. **Automated Reporting Solutions**: Eliminates the need for manual report generation by planners, saving significant time and resources.
5. **Customizable and Brand-Aligned Interface**: Ensures the interface and reports reflect brand identity, enhancing stakeholder engagement and confidence.
6. **Seamless Primavera P6 Integration**: Facilitates full automation and real-time data access for strategic planning and operational guidance.
7. **Strategic Insights for Informed Decision-Making**: Enables decision-makers to quickly target issues and problem areas with customized presentation and analytics.
8. **Elimination of Data Silos**: Provides a unified view of data, removing barriers to information access and enhancing cross-project resource management.
9. **Immediate Access to Critical Data and Insights**: Through intuitive filtering, viewing, exporting, and sharing capabilities, stakeholders can swiftly access and act on essential information.
10. **Adaptive Functionality for Diverse Needs**: Offers flexible solutions tailored to the specific requirements of different projects and organizational levels, ensuring relevance and usability.

# Primer Performance

The Primer Performance Report is the cornerstone for organizations focused on enhancing their project delivery through rigorous Earned Value Management (EVM) analysis and performance evaluation. Recognizing the common industry challenge where a significant percentage of projects exceed their budget, this report provides a comprehensive tool for better estimating forecasts, understanding budget allocations, and improving project productivity. It facilitates a deeper understanding of how budgets are being utilized, offering visibility into forecasting and enabling proactive avoidance of potential project failures. The report caters to the critical needs of knowing the final costs, end dates, and overall productivity in project delivery, along with ensuring efficient staff and contractor allocation. It offers simplified data analysis, customizable reporting, and insights designed from real-world reporting experience, making it an indispensable tool for achieving value for money in project delivery and ensuring resource efficiency across the board.

## Target Audience

* **Project Control Specialists**: Focus on performance measurement using EVM and other metrics to evaluate project health, forecast outcomes, and implement corrective actions.
* **Project Team Members and Contractors**: Individuals and teams executing project tasks who benefit from understanding their impact on project performance, budget adherence, and timelines.
* **Resource Managers**: Responsible for allocating human and material resources across projects, looking for insights into resource utilization, levelling, and forecasting to prevent overallocation and burnout.
* **Operational Managers**: Manage day-to-day project operations and need to understand performance metrics to ensure projects are on track, within budget, and staffed appropriately.
* **Business Analysts**: Analyse project data for trends, efficiencies, and areas of improvement, focusing on enhancing productivity, estimating accuracy, and cost management.

## Problems Addressed by Primer Reports for Each Target Audience

* **Project Control Specialists**: Find it challenging to accurately measure and improve project performance due to inadequate EVM tools. Primer enhances performance tracking and forecasting.
* **Project Team Members and Contractors**: Lack visibility into how their work impacts overall project health and performance. Primer provides actionable insights for improving individual and team contributions.
* **Resource Managers**: Experience difficulty in optimally allocating resources, leading to overallocation or underutilization. Primer aids in effective resource levelling and forecasting.
* **Operational Managers**: Need to ensure projects run smoothly but lack detailed performance metrics. Primer offers detailed performance analytics for operational efficiency.
* **Business Analysts**: Struggle with gathering and analysing data to identify trends and improvement areas. Primer simplifies data analysis and supports strategic business decisions.

## Audience Insight

| **Needs & Jobs** | Gains | Pains |
| --- | --- | --- |
| Accurate Earned Value Management (EVM) Reports | Enhanced forecasting accuracy | Projects often exceed budget by 85% |
| Cost-effective project delivery | Insight into budget and cash flow challenges | Uncertainty in resource allocation timing |
| Transparency in budget allocation | Improved forecasting visualization | Unknown final project costs |
| Boosts in estimating efficiency and productivity | Establishment of project norms for better planning | Unpredictable project completion dates |
| Spend and resource forecasting | Mitigation of potential cost overruns and failures | Lack of insight into project delivery productivity |
| Review of staff and contractor allocation | Resource and staffing efficiency | Project delays due to misallocation |
| Effective resource levelling | Forecasted individual capacity | Unrealistic demands on labour |
| Optimization of resource demand | Recruitment insights for HR planning | Inefficient use of resources |
| Identification of required roles | Enhanced work quality from well-allocated individuals | Poor resource assignment and management |
|  |  | Lack of visibility into staff assignments |
|  |  | Overextension and burnout of team members |
|  |  | Resource bottlenecks causing delays |

## Proposition Enhancement

| **Gain Creators** | Pain Relievers | Products & Services |
| --- | --- | --- |
| Simplified data analysis for better insights | More accurate estimating and budgeting | EVM Reporting Tools |
| Customizable reports and interfaces | Enhanced budget forecasting | Resource Demand Planning Tools |
| Real-world reporting experience design | Project delay avoidance | Human Resource Analysis Tools |
| Intuitive control and data exploration | Prevention of team overstretching | Resource Levelling Tools |
| Broader analytics than available in P6 | Elimination of resource bottlenecks |  |
| Detailed insights into individuals and roles | Reduction of wasted resources |  |
| Visibility into all assignments across projects | Clear task visualization for optimal allocation |  |
| Forecast sharing with HR for proactive planning | Staff and contractor allocation dashboards |  |
|  | Reconciliation of timesheet vs budgeted hours |  |

## Key Value Propositions as a List

1. **Enhanced Forecasting Accuracy with EVM Reports**: Provides critical insights into project budgets and forecasts, improving accuracy and reducing the likelihood of exceeding budgets.
2. **Insight into Budget and Cash Flow Challenges**: Offers visibility into financial challenges, enabling proactive management and adjustments.
3. **Improved Forecasting Visualization**: Utilizes intuitive interfaces for better forecasting and planning, aiding in the prevention of cost overruns and project failures.
4. **Resource Demand Planning Tools**: Enables efficient allocation and levelling of resources, preventing project delays and labour inefficiencies.
5. **Human Resource Analysis Tools**: Offers insights into staffing needs, facilitating HR planning and recruitment efforts.
6. **Resource Levelling Tools**: Helps balance workloads across teams to ensure individuals are not overallocated, enhancing productivity and work quality.
7. **Visibility into Individual Assignments and Roles**: Provides detailed insights into team assignments and roles, ensuring optimal resource management and allocation.
8. **Staff and Contractor Allocation Dashboards**: Enables clear visibility and management of staff and contractor allocations, aiding in the reconciliation of timesheets with budgeted hours.
9. **Avoidance of Overstretched Teams and Resource Bottlenecks**: Through clear visibility and forecasting, ensures teams are appropriately staffed without causing burnout or project bottlenecks.
10. **Simplified Data Analysis and Customizable Reporting**: Offers tools designed from real-world experiences for intuitive control, easy data exploration, and customizable reporting to meet diverse project needs.