# 80.01 Project to profit scenario board discovery workshop

The Project to profit scenario board discovery workshop is designed to help establish a comprehensive understanding of the end-to-end project lifecycle for both internal project management and external (billable) projects in service-based organizations. This workshop supports the implementation of Dynamics 365 and guides participants through the key scenarios and business process areas involved in project strategy, contracting, delivery, financials, and performance analysis. The goal is to align stakeholders on the project operating model, identify key requirements, and define the scope for solution design.

## Assumptions

* The Project to profit process is in scope for the Dynamics 365 implementation.
* The scenario board includes both internal and external project use cases.
* Stakeholders from project management, finance, operations, and service delivery are available. The following stakeholders are recommended:
* Here’s a recommended list of key stakeholders for the **Project to profit** scenario board and storyline design review workshops. This list includes roles relevant to both internal project management and external (billable) project delivery:
  + **Project portfolio managers** – responsible for aligning project strategy with organizational goals and prioritizing initiatives.
  + **Project managers** – responsible for planning, executing, and closing projects across internal and external engagements.
  + **Program managers** – responsible for overseeing multiple related projects and ensuring alignment with strategic objectives.
  + **Delivery managers** – responsible for ensuring successful delivery of client-facing (billable) projects.
  + **Resource managers** – responsible for assigning and managing project resources and capacity planning.
  + **Contract managers** – responsible for managing customer contracts, billing terms, and change orders for external projects.
  + **Finance managers / controllers** – responsible for project budgeting, cost tracking, revenue recognition, and profitability analysis.
  + **Time and expense administrators** – responsible for managing time entry, approvals, and expense tracking.
  + **Operations managers** – responsible for ensuring project execution aligns with operational processes and service delivery standards.
  + **IT and system architects** – responsible for implementing and maintaining project management and financial systems (e.g., Dynamics 365, PSA).
  + **Compliance and audit officers** – responsible for ensuring project governance, regulatory compliance, and audit readiness.
  + **Executive sponsors / leadership** – responsible for strategic oversight and ensuring project outcomes support business objectives.

## Objectives

* Understand the customer’s project operating models (internal and external).
* Identify key scenarios and requirements across the project lifecycle.
* Document agreed business scope and variations by project type.

## High-level agenda

* Introduction and objectives
* Overview of Project to profit process
* Discussion of internal vs. external project scenarios
* Interactive Q&A session
* Wrap-up and next steps

## Key questions

* **General**
  + What types of projects does your organization manage (internal, external, capital, R&D, client delivery, MRO)?
  + How are project types differentiated in terms of governance, financials, and reporting?
  + What are the key challenges in managing projects today?
  + What systems are currently used to manage project lifecycle activities?
* **Develop project strategy**
* How are project portfolios prioritized and aligned with business goals?
* What criteria are used to initiate and approve new projects?
* How are project charters, scopes, and objectives defined?
* **Manage project contracts (for external projects)**
  + How are customer contracts structured (T&M, fixed price, milestone)?
  + How are contract terms and billing rules captured and enforced?
  + How are changes to scope or pricing managed?
* **Manage project delivery**
* How are project plans created and maintained?
* How are resources assigned and tracked?
* How is progress monitored (milestones, tasks, deliverables) and reported?
* How are risks and issues managed?
* **Manage project financials**
* How are budgets created and approved?
* How are actuals tracked (labor, expenses, materials)?
* How is revenue recognized for external projects?
* How are internal costs allocated and capitalized?
* **Analyze project performance**
* What KPIs are tracked (margin, utilization, earned value)?
* How is project profitability analyzed?
* How are lessons learned and performance insights captured?
* **Data migration**
* What project data needs to be migrated (historical projects, budgets, contracts)?
* How is project master data structured (project types, templates, WBS)?
* Are there known data quality issues?
* **Integrations**
* What systems need to integrate with Dynamics 365 (e.g., PSA, ERP, time tracking)?
* Are there real-time integration needs (e.g., resource availability, billing)?
* What are the key challenges in current integrations?
* Integration with Leaning system (Skills and levels to be able to match resource to requirements) .
* Integration with HR system for employee master , Absence management and integration into time management
* Integration with Payroll and access management requirements

## Scenario board

Following is a sample scenario board template for the Project to profit process.



The image is a flowchart titled Project to Profit Scenario Board that outlines a business process from hiring to retirement. The top row depicts a basic flowchart of the business process areas for the Project to profit process. Below each process step there are one or more blue boxes that depict scenarios and key attributes of the business process area for discussion in the workshop. The bottom of the graphic includes horizontal or supporting processes that support the entire Project to profit process.

1. 80.10 Develop Project Strategy

* Scenarios
  + Internal projects
  + Customer-funded projects
  + Capital investment projects
  + R&D or innovation projects
  + Grant funded projects
* Compliance
  + Regulatory and industry-specific standards
  + Environmental and sustainability guidelines
  + Corporate governance
* Policies
  + Project selection and prioritization
  + Risk management framework
  + Strategic alignment criteria
  + Portfolio management
  + Workflow and approval processes

1. 80.20 Manage Project Contracts

* Scenarios
  + Time and materials contracts
  + Fixed-price contracts
  + Cost-plus contracts
  + Subcontractor agreements
* Compliance
  + Contract law
  + Data privacy and confidentiality
  + Export control and trade compliance
* Policies
  + Contract approval workflows
  + Change order management
  + Terms and conditions
  + Legal review and audit

1. 80.30 Plan Projects

* Scenarios
  + Work breakdown structure (WBS)
  + Resource planning
  + Budget planning
  + Timeline and milestone planning
* Compliance
  + Labor laws and union rules
  + Safety and regulatory planning
* Policies
  + Project planning standards
  + Resource allocation rules
  + Budget approval thresholds
  + Scheduling methodologies (e.g., Agile, Waterfall)
  + Forecasting frequency and methods
  + Contingency and reserve policies
  + Cost estimation guidelines

1. 80.40 Manage Project Delivery

* Scenarios
  + Task execution and tracking
  + Resource time entry
  + Issue and risk management
  + Change management
* Policies
  + Project governance
  + Escalation procedures
  + Communication protocols
  + Quality assurance
* Time
  + Web portal
  + Mobile time tracking
  + Timesheet approvals and workflows
  + Clock-in/clock-out systems
  + HR integration
  + Time tracking by task, phase, or deliverable
* Material Acquisition Methods
  + Purchase orders
  + Inventory drawdowns
  + Subcontracted materials
  + Just-in-time delivery
* Expense Types
  + Travel and lodging
  + Meals and entertainment
  + Equipment rental
  + Software or licensing
  + Mileage and fuel
  + Miscellaneous project-related costs
* Expense Tracking Methods
  + Manual entry with receipts
  + Mobile expense capture
  + Corporate card integration
  + Pre-approved expense categories

1. 80.50 Manage Project Financials

* Internal Scenarios
  + Capital project tracking
  + Budget vs. actual cost monitoring
  + Internal chargebacks or cost allocations
  + Asset capitalization
* External Scenarios
  + Time and materials invoicing
  + Milestone-based invoicing
  + Retainer Fee + Time utilization beyond entitlement
* Compliance
  + Internal controls
  + Capitalization rules
  + Budget governance
  + Revenue recognition
  + Contractual billing terms
  + Change order impact
* Internal policies
  + Cost allocation methods
  + Budget approval
  + Forecasting and reforecasting cycles
  + Project closure and financial reconciliation
* External policies
  + Billing frequency and formats
  + Time and expense billing rules
  + Margin thresholds and escalation
  + Credit checks

1. 80.60 Analyze Project Performance

* Metrics
  + Budget vs. actual
  + Earned value (EV)
  + Project margin
  + Utilization rates
* Reports
  + Project status reports
  + Financial performance reports
  + Risk and issue logs
  + Lessons learned and post-mortem reviews

# 80.02 Project to profit storyline design review workshop

The Project to profit storyline design review workshop is a critical step in validating the proposed solution design for managing projects in Dynamics 365. This session focuses on reviewing the “happy path” scenarios for both internal and external projects, conducting a fit-to-standard review, and identifying any gaps or design decisions. The goal is to ensure that the solution supports the full project lifecycle and aligns with business needs.

## Assumptions

* The agreed business scope from the scenario board workshop is finalized.
* Dynamics 365 is configured for the selected storyline scenarios.
* Stakeholders from project management, finance, and operations are available.

## Objectives

* Demonstrate Dynamics 365 capabilities for project lifecycle management.
* Validate the solution design for internal and external project scenarios.
* Identify gaps, risks, and decisions.
* Define next steps for configuration and testing.

## High-level agenda

* Introduction and objectives
* Demonstration of storyline scenarios (internal and external projects)
* Fit-to-standard discussion
* Q&A and feedback
* Wrap-up and next steps

## Key questions

* Does the solution support your internal and external project models effectively?
* Are there any gaps in functionality or integration?
* How are billing, cost tracking, and resource management handled?
* Are there any concerns with usability, scalability, or compliance?
* What changes are needed to align with your operational goals?

# 80.10.001 Develop internal project strategy deep-dive discovery workshop

This workshop is designed to define and refine the project strategy for internal projects using Dynamics 365. It focuses on aligning project portfolios with organizational goals, prioritizing initiatives, and ensuring effective governance.

## Assumptions

* Internal projects are a core focus of the organization.
* Stakeholders from project management, finance, and operations are available.
* Current project strategies and master data are documented and accessible.

## Objectives

* Define internal project strategy requirements.
* Identify gaps in current processes and systems.
* Plan for data migration and system integrations.

## High-level Agenda

* Introduction and objectives
* Review of current internal project strategy
* Project portfolio alignment and prioritization
* Governance and approval workflows
* Wrap-up and next steps

## Stakeholders

* Project portfolio managers
* Project managers
* Program managers
* Operations managers
* IT and system architects
* Finance managers
* Compliance and audit officers
* Executive sponsors

## Key Questions

* General
  + What types of internal projects does your organization manage (capital, R&D, operational)?
  + How are project types differentiated in terms of governance, financials, and reporting?
  + What are the key challenges in managing internal projects today?
  + What systems are currently used to manage project lifecycle activities?
* Project Portfolio Alignment
  + How are project portfolios prioritized and aligned with business goals?
  + What criteria are used to initiate and approve new projects?
  + How are project charters, scopes, and objectives defined?
* Governance and Approval Workflows
  + How are project governance structures defined?
  + What approval workflows are in place for project initiation and changes?
  + How are risks and issues managed and escalated?
* Data Migration
  + What project data needs to be migrated (historical projects, budgets, contracts)?
  + How is project master data structured (project types, templates, WBS)?
  + Are there known data quality issues?
* Integrations
  + What systems need to integrate with Dynamics 365 (e.g., ERP, time tracking)?
  + Are there real-time integration needs (e.g., resource availability)?
  + What are the key challenges in current integrations?

# 80.10.002 Develop external project strategy deep-dive discovery workshop

This workshop is designed to define and refine the project strategy for external (billable) projects using Dynamics 365. It focuses on managing customer contracts, billing terms, project delivery, and profitability analysis.

## Assumptions

* External projects are a core focus of the organization.
* Stakeholders from project management, finance, and service delivery are available.
* Current project strategies and master data are documented and accessible.

## Objectives

* Define external project strategy requirements.
* Identify gaps in current processes and systems.
* Plan for data migration and system integrations.

## High-level Agenda

* Introduction and objectives
* Review of current external project strategy
* Customer contract management and billing
* Project delivery and profitability analysis
* Wrap-up and next steps

## Stakeholders

* Project managers
* Delivery managers
* Contract managers
* Resource managers
* Finance managers
* Time and expense administrators
* IT and system architects
* Executive sponsors

## Key Questions

* General
  + What types of external projects does your organization manage (T&M, fixed price, milestone)?
  + How are project types differentiated in terms of governance, financials, and reporting?
  + What are the key challenges in managing external projects today?
  + What systems are currently used to manage project lifecycle activities?
* Customer Contract Management
  + How are customer contracts structured?
  + How are contract terms and billing rules captured and enforced?
  + How are changes to scope or pricing managed?
* Project Delivery
  + How are project plans created and maintained?
  + How are resources assigned and tracked?
  + How is progress monitored (milestones, tasks, deliverables)?
  + How are risks and issues managed?
* Profitability Analysis
  + How is revenue recognized for external projects?
  + How are project costs tracked (labor, expenses, materials)?
  + How is project profitability analyzed?
  + What KPIs are tracked (margin, utilization, earned value)?
* Data Migration
  + What project data needs to be migrated (historical projects, budgets, contracts)?
  + How is project master data structured (project types, templates, WBS)?
  + Are there known data quality issues?
* Integrations
  + What systems need to integrate with Dynamics 365 (e.g., PSA, ERP, time tracking)?
  + Are there real-time integration needs (e.g., resource availability, billing)?
  + What are the key challenges in current integrations?

# 80.20.001 Manage project contracts deep-dive discovery workshop

The Manage Project Contracts deep dive discovery workshop is designed to help your organization effectively manage project contracts using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for managing project contracts, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in project contract management decisions are available and willing to participate.
* Current project contract management strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of project contract management principles and standards.
* Relevant data on project contract management strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level Agenda

* Introduction and objectives
* Current processes and systems
* Contract types and billing terms
* Change management
* Compliance and regulatory concerns
* Integration with financial systems
* Wrap-up and next steps

## Stakeholders

* Project managers
* Contract managers
* Finance managers / controllers
* Legal and compliance officers
* IT and system architects
* Executive sponsors / leadership

## Key Questions

* Contract Types
  + What types of contracts are used (T&M, fixed price, milestone)?
  + How are contract terms and conditions defined?
  + How are contracts categorized and managed?
  + What are the key challenges in managing different contract types?
* Billing Terms
  + How are billing terms captured and enforced?
  + How are billing rules defined (e.g., hourly rates, fixed fees, milestones)?
  + How are invoices generated and approved?
  + What are the key pain points in billing and invoicing?
* Change Management
  + How are changes to scope or pricing managed?
  + What is the approval process for change orders?
  + How are changes documented and communicated?
  + What are the key challenges in managing change orders?
* Compliance and Regulatory Concerns
  + What regulatory requirements impact project contracts?
  + How is compliance with contract terms monitored?
  + How are audit trails and documentation maintained?
  + What are the key compliance challenges?
* Integration with Financial Systems
  + What financial systems need to integrate with Dynamics 365?
  + How is data exchanged between project management and financial systems?
  + Are there real-time integration needs?
  + What are the key challenges in current integrations?

# 80.30.001 Plan projects deep-dive discovery workshop

This workshop is designed to define and refine the project planning process within the Project to profit end-to-end process using Dynamics 365. It covers project scope, resource planning, task management (WBS), forecasting, and budgeting. The goal is to align stakeholders on planning models, constraints, and execution approaches tailored to both internal and external projects.

## Assumptions

* Project planning is a core component of the Project to profit process.
* Stakeholders from project management, finance, operations, and service delivery are available.
* Current project planning strategies and master data are documented and accessible.

## Objectives

* Define project planning requirements across internal and external projects.
* Identify process gaps and improvement opportunities.
* Plan for data migration and system integrations.

## High-level agenda

* Introduction and objectives
* Review of current project planning strategies
* Discussion by project planning areas (scope, resources, tasks, forecasting, budgeting)
* Approval workflows and compliance
* Wrap-up and next steps

## Stakeholders

* Project managers
* Program managers
* Resource managers
* Finance managers / controllers
* Time and expense administrators
* Operations managers
* IT and system architects
* Compliance and audit officers
* Executive sponsors / leadership

## Key questions

* Project Scope
  + How are project scopes defined and documented?
  + What criteria are used to approve project scopes?
  + How are scope changes managed and communicated?
  + How is scope alignment ensured with business objectives?
* Resource Planning
  + How are resources assigned to projects?
  + How is resource availability tracked and managed?
  + What tools are used for resource capacity planning?
  + How are resource conflicts resolved?
* Task Management (WBS)
  + How are project tasks defined and structured (WBS)?
  + How are task dependencies managed?
  + What tools are used for task tracking and reporting?
  + How is task progress monitored and communicated?
* Forecasting
  + How are project forecasts created and maintained?
  + What criteria are used for forecasting project timelines and costs?
  + How are forecast variances tracked and managed?
  + What tools are used for project forecasting?
* Budgeting
  + How are project budgets created and approved?
  + How are actuals tracked against budgets?
  + How are budget changes managed and communicated?
  + What tools are used for project budgeting?

# 80.40.001 Manage internal project delivery deep-dive discovery workshop

This workshop is designed to define and refine the project delivery process for internal projects using Dynamics 365. It covers project governance, change orders, time, materials, and expense tracking, including purchasing and production scenarios for materials, subcontracting, and communication and documentation.

## Assumptions

* Internal projects are a core focus for the organization.
* Stakeholders from project management, finance, operations, and IT are available.
* Current project delivery processes and documentation are accessible.

## Objectives

* Define internal project delivery requirements.
* Identify gaps in current processes and systems.
* Plan for data migration and system integrations.

## Agenda

* Introduction and objectives
* Review of current internal project delivery process
* Project governance and change management
* Time, materials, and expense tracking
* Purchasing and production scenarios
* Subcontracting
* Communication and documentation
* Wrap-up and next steps

## Stakeholders

* Project managers
* Operations managers
* Finance managers
* IT and system architects
* Procurement managers
* Production managers
* Subcontracting coordinators
* Compliance and regulatory officers
* Executive leadership

## Key Questions

* Project Governance
  + How are internal projects governed and monitored?
  + What approval processes are in place for project initiation and changes?
  + How are project roles and responsibilities defined?
* Change Orders
  + How are change requests managed and approved?
  + What impact analysis is conducted for change orders?
  + How are changes communicated to stakeholders?
* Time, Materials, and Expense Tracking
  + How is time tracked for internal projects?
  + How are materials and expenses recorded and allocated?
  + What systems are used for time and expense tracking?
* Purchasing and Production Scenarios
  + How are materials purchased for internal projects?
  + How is production managed for project-related materials?
  + How are subcontractors managed and integrated into the project?
* Communication and Documentation
  + How is project communication managed?
  + What documentation standards are followed?
  + How are project records stored and accessed?

# 80.40.002 Manage external project delivery deep-dive discovery workshop

This workshop is designed to define and refine the project delivery process for external (billable) projects using Dynamics 365. It covers project governance, change orders, time, materials, and expense tracking, including purchasing and production scenarios for materials, subcontracting, and communication and documentation.

## Assumptions

* External (billable) projects are a core focus for the organization.
* Stakeholders from project management, finance, operations, and IT are available.
* Current project delivery processes and documentation are accessible.

## Objectives

* Define external project delivery requirements.
* Identify gaps in current processes and systems.
* Plan for data migration and system integrations.

## Agenda

* Introduction and objectives
* Review of current external project delivery process
* Project governance and change management
* Time, materials, and expense tracking
* Purchasing and production scenarios
* Subcontracting
* Communication and documentation
* Wrap-up and next steps

## Stakeholders

* Project managers
* Operations managers
* Finance managers
* IT and system architects
* Procurement managers
* Production managers
* Subcontracting coordinators
* Compliance and regulatory officers
* Executive leadership

## Key Questions

* Project Governance
  + How are external projects governed and monitored?
  + What approval processes are in place for project initiation and changes?
  + How are project roles and responsibilities defined?
* Change Orders
  + How are change requests managed and approved?
  + What impact analysis is conducted for change orders?
  + How are changes communicated to stakeholders?
* Time, Materials, and Expense Tracking
  + How is time tracked for external projects?
  + How are materials and expenses recorded and billed?
  + What systems are used for time and expense tracking?
* Purchasing and Production Scenarios
  + How are materials purchased for external projects?
  + How is production managed for project-related materials?
  + How are subcontractors managed and integrated into the project?
* Communication and Documentation
  + How is project communication managed?
  + What documentation standards are followed?
  + How are project records stored and accessed?
* Invoicing and revenue recognition
  + What is the typical invoice frequency?
  + How is revenue for external projects recognized?
  + Are pricelists generic, customer specific and/or project specific?

# 80.50.001 Manage internal project financials deep-dive discovery workshop

This workshop focuses on managing project financials for internal projects using Dynamics 365. It includes scenarios for converting projects into assets, tracking WIP/CIP, and expensing projects.

## Assumptions

* Internal projects are a core focus area.
* Stakeholders from finance, project management, and operations are available.
* Current financial processes and data are documented and accessible.

## Objectives

* Define financial management requirements for internal projects.
* Identify gaps in current financial processes and systems.
* Plan for data migration and system integrations.

## High-level Agenda

* Introduction and objectives
* Review of current financial processes for internal projects
* Converting projects into assets
* Tracking WIP/CIP
* Expensing projects
* Wrap-up and next steps

## Stakeholders

* Finance managers / controllers
* Project managers
* Operations managers
* IT and system architects
* Compliance and audit officers
* Executive leadership

## Key Questions

* General
  + What types of internal projects are managed (capital, R&D, IT, etc.)?
  + How are project financials tracked and reported?
  + What are the key challenges in managing internal project financials?
* Converting Projects into Assets
  + How are projects identified for capitalization?
  + What criteria are used to determine asset conversion?
  + How is the asset creation process managed and approved?
* Tracking WIP/CIP
  + How is WIP/CIP tracked and reported?
  + What systems are used to manage WIP/CIP?
  + How are WIP/CIP balances reconciled?
* Expensing Projects
  + How are project expenses tracked and allocated?
  + What approval processes are in place for project expenses?
  + How are expenses reported and analyzed?
* Data Migration
  + What financial data needs to be migrated (historical projects, WIP balances, expense records)?
  + How is financial master data structured (project codes, cost centers, GL accounts)?
  + Are there known data quality issues?
* Integrations
  + What systems need to integrate with Dynamics 365 (e.g., ERP, asset management)?
  + Are there real-time integration needs (e.g., expense tracking, asset creation)?
  + What are the key challenges in current integrations?

# 80.50.002 Manage external project financials deep-dive discovery workshop

This workshop focuses on managing project financials for external (billable) projects using Dynamics 365. It includes scenarios for invoicing, revenue recognition, milestone billing, and transaction-based billing.

## Assumptions

* External (billable) projects are a core focus area.
* Stakeholders from finance, project management, and service delivery are available.
* Current financial processes and data are documented and accessible.

## Objectives

* Define financial management requirements for external projects.
* Identify gaps in current financial processes and systems.
* Plan for data migration and system integrations.

## High-level agenda

* Introduction and objectives
* Review of current financial processes for external projects
* Invoicing and billing scenarios
* Revenue recognition
* Milestone billing
* Transaction-based billing
* Wrap-up and next steps

## Stakeholders

* Finance managers / controllers
* Project managers
* Service delivery managers
* IT and system architects
* Compliance and audit officers
* Executive leadership

## Key Questions

* General
  + What types of external projects are managed (T&M, fixed price, milestone)?
  + How are project financials tracked and reported?
  + What are the key challenges in managing external project financials?
* Invoicing and Billing Scenarios
  + How are invoices generated and approved?
  + What billing rules are used (T&M, fixed price, milestone)?
  + How are billing disputes and adjustments handled?
* Revenue Recognition
  + How is revenue recognized for different project types?
  + What criteria are used for revenue recognition (e.g., percentage of completion, milestones)?
  + How is deferred revenue managed?
* Milestone Billing
  + How are billing milestones defined and tracked?
  + How is milestone completion verified?
  + How are milestone invoices generated?
* Transaction-Based Billing
  + How are billable transactions captured and approved?
  + How are transaction-based invoices generated?
  + How are billing rates and rules managed?
* Data Migration
  + What financial data needs to be migrated (historical projects, billing records, revenue recognition)?
  + How is financial master data structured (project codes, billing rules, GL accounts)?
  + Are there known data quality issues?
* Integrations
  + What systems need to integrate with Dynamics 365 (e.g., ERP, billing systems)?
  + Are there real-time integration needs (e.g., time tracking, billing)?
  + What are the key challenges in current integrations?

# 80.60.001 Analyze project performance deep-dive discovery workshop

The Analyze Project Performance deep dive discovery workshop is designed to help your organization effectively analyze project performance using Dynamics 365. This session will delve into your current systems, processes, and pain points, and identify any gaps in the out-of-the-box functionality. The workshop will focus on understanding the overall strategy for analyzing project performance, key reporting requirements, budget definitions, and other critical policies.

## Assumptions

* Key stakeholders involved in project performance analysis decisions are available and willing to participate.
* Current project performance analysis strategies, reporting requirements, and budget processes are documented and accessible.
* Participants have a basic understanding of project performance analysis principles and standards.
* Relevant data on project performance analysis strategies, reporting requirements, and budget definitions is available.

## Objectives

* Define detailed requirements and design.
* Identify gaps and areas for improvement.
* Plan data migration and integrations.

## High-level Agenda

* Introduction and objectives
* Current processes and systems
* Volume of transactions and needs
* Approval processes and policies
* Compliance and regulatory concerns

## Stakeholders

* Project portfolio managers
* Project managers
* Program managers
* Delivery managers
* Resource managers
* Contract managers
* Finance managers / controllers
* Time and expense administrators
* Operations managers
* IT and system architects
* Compliance and audit officers
* Executive sponsors / leadership

## Key Questions

* KPIs
  + What key performance indicators (KPIs) are tracked for projects?
  + How is project margin calculated and monitored?
  + How is resource utilization measured and optimized?
  + How is earned value management (EVM) implemented and tracked?
* Profitability
  + How is project profitability analyzed?
  + Are there any organization level policies that allow cost booking to later than project end dates that can impact profitability ?
  + What methods are used to track and report on project financial performance?
  + How are cost variances identified and managed?
  + How is revenue recognized for external projects?
* Utilization
  + How is resource utilization tracked?
  + What tools are used to optimize resource allocation?
  + How are resource constraints identified and addressed?
  + How is resource availability forecasted?
* Earned Value
  + How is earned value calculated?
  + What tools are used to track earned value?
  + How are variances between planned and actual performance managed?
  + How is earned value used to forecast project completion?
* Forecasting Accuracy
  + How is forecasting accuracy measured?
  + What methods are used to improve forecasting accuracy?
  + How are forecast variances tracked and managed?
  + How is historical data used to improve future forecasts?
* Lessons Learned
  + How are lessons learned captured and documented?
  + What processes are in place to ensure lessons learned are applied to future projects?
  + How are lessons learned shared across the organization?
  + How is the effectiveness of lessons learned measured?