



Dental Pharma – Notes from the scoping interview with the dashboard sponsor

- International presence.
- 4 regions:
 - Western Europe,
 - Central/Eastern Europe-Middle East-Africa,
 - North and Latin America,
 - Asia Pacific.
- Struggling to assess how different projects are performing, especially those for IT and Marketing:
 - There are four phases for marketing projects
 - Planning
 - Initiation
 - Implementation
 - Manufacturing
- There are six phases for IT projects:
 - Initiation
 - Preparation
 - Development
 - Testing
 - Deployment
 - Post_deployment
- Lots of data but unsure how to make use of it.
- Want to make strategic project data visually accessible to directors.
- Several users with different levels of responsibility and needs:
 - The General Managers, who decide whether to halt or proceed with projects. To do this, they need to be alerted when there are significant performance gaps for projects. They also need to be able to monitor the overall performance of **all** projects.
 - Regional Managers who intervene with Country Managers in their region if there are performance gaps on projects. They need to be alerted regarding projects **in their regions**, and need to be able to monitor them.
 - Country Managers who take corrective action for projects falling under their responsibility. To do this, they need to be able to view indicators for projects **in their country**.
- Activity is guided by three key “Project Portfolio” indicators:
 - Actual project cost vs planned cost (i.e. meeting project budgets)

- Actual duration vs planned duration (i.e. meeting project deadlines)
 - Project deliverables actually produced vs. those forecast
- A 15% difference on any of these indicators between forecasts and the actual state of affairs should trigger an alert to the Managers. Users should be able to adjust this threshold.
- Regarding the dashboard:
 - It will be used by the three types of Managers, each with restricted access (for this project, they are the General Manager, one Regional Manager and one Country Manager).
 - It should include a map of the world, highlighting the regions that Dental Pharma operate in
 - It should show a table of the projects and their attributes
 - Users should be given the ability to filter each of the three project-portfolio indicators by country or region
 - It should show how much over budget the projects are over time
- Additional requirement:
 - Chart needed which can be exported from the dashboard for external stakeholders (mostly suppliers and potential clients)
 - It should show the duration of projects by country and phase
 - Ideally, because it's client-facing, it should be attractive and interactive.