Project Proposal

1. **Executive Summary.**

   1.1. We will be exploring a sample set of construction sales data for national renovations company to create a dashboard for the business owners and decision makers to clearly track and identify key metrics and points of interest. Becoming efficient in the construction industry is challenging endeavor for any company and especially those within niche sectors such as hospitality renovations. With so many factors affecting profits such as unknown conditions, schedule changes, materials and labor cost variances it is important for decision makers to have accessible and interpretable data that can be used to pinpoint and highlight key findings in order to maintain this efficiency. In a constantly changing environment such as the construction world it is important to make changes to process in business before they become detrimental to profits and sales.

2. **Why.**

   2.1. This workbook with be used by the C-Level Executives of the company to determine a baseline in order to develop key performance indicator and analytics that will be important in making necessary changes to processes when needed. The goal of this project is to develop an exploratory analysis tool which the company owners can utilize as a foundation to begin understanding patterns and then implement changes if necessary. The workbook and dashboard created should be able to be easily navigate to different summary visuals while also having the interactivity to go into further detail when needed. Being able to capture high level summaries and have the interactivity to drill down to necessary details is important for the client as it will be used for both C-Level meetings and to send certain visuals to necessary team members

3. **Who**

   3.1. Stakeholders – Historical data of company revenue since inception, stakeholders are the CFO/VP/President

   3.2. Audience – C Level executives familiar with financials. Project manager not so familiar with financials but ability to understand clear points and implement changes needed for projects.

3.3. Staci, 62, Female, CFO

3.3.1. A representative photo -

3.3.2. Goals – Get a high level overview of the current business for projections and interactively pull reports for team members as needed. Understand data of historic contracts and profits to delve further into analysis and develop better profitability strategy

3.3.3. Challenges and needs – Understanding the history of business has always been ambiguous, I would like to know more details about how costs and profits are related. Current software makes it a hassle to pull reports and I cannot track current expenses and profits on all jobs or find the details like I want.

3.3.4. Context – Board meetings Use - occur quarterly in person and usually in a large room with 10-15 people**.** Evaluation Use - The user will interact with the reports on a weekly or monthly basis for internal dept reporting, and daily for gaining insights as necessary.

3.3.5. Other – Being of older age I am not the most technology friendly person.

3.4. Chris, 50, Male, President

3.4.1. A representative photo

3.4.2. Goals – Wants easy to understand points. Will make a decision and expect leads to implement changes based on this. Wants to know if there is a pattern for losses and if it is concentrated to certain clients or states. Use historical data to develop strategy for new business

3.4.3. Challenges and needs – Not good with details. Trusts CFO with understanding the numbers. Evaluating losses and pinpointing where they occurred is very important to understanding how we can better implement project budget strategies and develop project budget during the bid phase to ensure target profits.

3.4.4. Context – Busy schedule. Meets with board members quarterly, usually has lots of questions for Staci. Will use reports for talking points on video conference call with CFO, VP, and other C-Level decision maker sin the company

3.4.5. Other – I am tired of losing unnecessary money each year, I want to make changes to our business to better mitigate these losses by understanding how they occur.

3.5. Roger, 35, Male, Vice President

3.5.1. A representative photo

3.5.2. Goals – Usually takes direction Chris. Will follow his lead if he can understand the underlying detail of the data in reports. Wants to be able to communicate why he is making changes to the project team and back them up through reports

3.5.3. Challenges and needs – Does not have a lot of meeting time with teams. Has a knack for piecing together the small details from hi level summary but needs to be able to have team members under his management understand. Directly responsible for submitting bids and negotiating contract values, needs to be able to identify trends for future bids to ensure he has enough margin to make a profit on the job

3.5.4. Context – Reference material & internal exploration Roger travels 70% of the time. He is usually available for video conference calls on a remote basis. Although he has access to tableau reports and dashboard on his phone and computer, he likes to take the time after hours to explore these and make notes for discussion during meetings at a later time. He will print out key talking points of his findings and send a pdf to team members before each meeting weekly.

3.5.5. Other – I usually let Staci and Chris lead our board meeting and conference calls. I take charge with developing new client relations and reports on current projects from our project managers especially Charles. Also being the bidding estimator, I am very familiar with all of our project contract values but lose track of how profitable they ended up being after execution.

3.6. Charles, 30, Male, Project manager

3.6.1. A representative photo

3.6.2. Goals – Use Reports to address over budget areas in weekly meetings. Identify and assess over budget items for risk and possible change order presentation to client if necessary**.** Be able to clearly show missed deliverables to project team during meeting.

3.6.3. Challenges and needs – Does not have a lot of time to spend going through details, manages 5 projects in multiples regions needs to be able to interpret data quickly address in meetings with project supervisors. Receive weekly reports showing profit and loss costs to date and projections with KPI for items over budget.

3.6.4. Context – Email attachment either on a laptop or cellular device, or on occasion a link to URL with interactive report if formatted for layout**.** Meetings are usually held via video conference with share screen, interactivity is sometimes used. PDF reports of summary are delivered via email to all team members from the Project manager

3.6.5. Other – My meetings with project supervisors usually last about 15 to 30 minutes where we review project status. About 10 minutes of this is focused on financials where

3.7. Subject-Matter Experts – CFO/VP/President/Project Manager. All are associated with business data to some extent and how they work with the company. Some are better with details than others.

4. **What.**

4.1. **Sample data set created to show projects across states including the following data**

4.1.1. Profits

4.1.2. Contract Value

4.1.3. Overhead Costs

4.1.4. Operating Costs

4.1.5. Project Number

4.1.6. Client Name

4.1.7. State

4.1.8. Year

4.1.9. State Date

4.1.10. End Date

4.1.11. Headcount

4.1.12. Totals Days on project

4.2. I chose this data set because I am familiar with it form the beginning of the specialization and I think it is a good industry to look at making a tool to track efficiency specific to a clients needs.

5. **How.**

5.1. Findings should be presented as simply as possible. It is very important for the older C level stakeholders to be able to gather the necessary information quickly and easily, while some of the other audience members will need less frequent but more detailed reports

6. **Challenges.**

6.1. Creating a workbook with the required functions will be challenging to keep simple with so much data present and constantly being asked for by multiple parties. Like any other reports this will be accessible to top management only and it will be their responsibility to filter data and distribute report material as needed. It should be an easy interface for them to use and should not comprise the risk of access to sensitive or unwanted information by an end user. Some data will need to be discussed amongst the c-level executives while others will be needed for operations.