

Status Report PMO Consulting Phase 4

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Section 1: Progress Against the Scope

[X] Means Work is Done against the scope

From Swamiji

1. [X] LD dash board should have timeframe selection scale. (need input on timeframe unit & display format)
 - Based on CDD
2. [X] License assigning of Head-PPC and PPC members. (need discussion)
 - License to Kalyan, Ananad, Swaminathan.k@drholdings.in??
 - PowerBI license expired?
 - Swami Ji need Project Professional License?
3. [X] Checklist to monitor PMO efficacy. (need discussion)
 - A dashboard to for checking PMO effectiveness PM wise. Showing Projects, Tags, Missing Baseline, Updation, etc.
4. [X] How to add new resource name/action owner in action register. (I think it has been explained in last exercise, VN knows this. Let me know if any other action required it)
5. [X] Milestone name & critical activity flag – further discussion and action on latest e-mail dated 04th March. (ok, let's discuss)
6. [X] WIP POC (% of completion) job wise and activity wise instead of hours tracking which is there currently. (need input)
7. [X] LD project wise. Addl. Column to be added to manually enter actual LD incurred. – As of now this is done through manually entering the actual incurred LD in project information in MSP but it is not solving the purpose. (ok, let's discuss)
8. [X] Explanation on modified S-curve in power BI. (ok)
9. ~~[] Training on planning defects tab, interpretation and fixing it. (ok) Removed~~
10. [X] Manpower/ Resources, ABG and PBG, Fin view to be utilised and presented. (need input)
 - [X] Create one new milestone "Payment" & use that in project activities Milestone view
 - [X] One view like dispatch milestone view. It shall show ProjectName, MS Name, Date, Status

11. [X] Overview of the updated powerBI dash boards. (A 3 hours demo was done for Swami Ji)
12. [X] Formats, MIS to be reviewed with frequency at each level. (this and point below are related)
13. [X] SOPs, formats, sequence to be followed D,W,M,Q, H and Annually as in daily, weekly, Monthly, Quarterly, Half yearly. (I think it was part of my last report. You can follow that, unless there is something more specific)

From VN

1. [X] Checklist to monitor PMO efficacy (Duplicate to Swamiji)
2. [X] Change issue register to take input of actions (need input)
 - Reference number in Issue Register for the actions taken in action register.
3. [X] In job dispatch plan POC to be corrected (need input)
4. [X] All PMO info must be pre-validated and no errors. BI dashboards must be updated real time. Dispatch details are blank in CEO DB at present. (I can tell you how it can be done, but making data entries, ensuring their completeness and correctness is routine process. Some senior person within org should own this. If any issues are identified in formula or tallying data from one sheet to another then I can fix those as and when identified. There is no perfect system we make is workable for us by tuning it continuously based on our need). **Done lots of cleaning. TEAM own the data.**
5. [X] Payment milestone to be setup with invoice # post dispatch , invoice date and payment date. Format to be freezed. (what format? I think one flag need to be created in master and then use in all the plans at the time of planning or first time updation)
6. [X] LD project wise. Addl. Column to be added to manually enter actual LD incurred. (I think it was done in our last exercise, aren't you using?)
7. [X] To Add transportation charges and spares charges in Dispatch DB report to value. (I think this also is done in our last exercise, aren't you using?)
8. [] Task no to be fixed for each task. Task no should not change when an entry is added in MSP. (I think this is done in our last exercise). VN Mentioned this is not required now because we are going for TOC.
9. [X] ~~Material tracker for all materials job wise. Format to be freezed. Oracle reports : PPC indent tracking report and OSP Report has the data. (Need discussion)~~
 - ~~[X] VN will explain this again to me. VN Dropped this~~
10. [X] Sub-contractor. Format to be freezed (Need discussion). A separate dashboard is develop.
11. [] Project closure checklist to be followed by all PMs (Need discussion)
 - [] VN will explain this again to me. VN has checklist ready he didn't share with me.
12. [] Plan vs actual week wise and project wise (need discussion)
 - [] Which plan? BL or Changing Plan? (VN dropped this)
13. [X] Production Manhours budget vs actual from start to finish (need discussion)

Section 2: Day-wise Work

29-Apr-19, Mon

Issues & Concerned Noted

- PowerBI Pro licenses expired and not purchased. VN reported in an email that PowerBI not working since last 2 weeks.
- If TOC is optimising constrained resources for week to week delivery and weekly plan from production department is being tracked on kanban board then who is tracking the risk, issues, milestone against the **project project plan**?
- Why **"Vinod Kumar 2"** resources added in the system, even if it happened by error why not identified?
- Why **"Project Schedule Review"** checklist is not being used?

- Viswanathan mentioned at “this time” we don't need any consulting we have our internal problem and we need to come out of it first then only consulting will help us.
- As per Viswanathan management is not able to prioritize the work over HoD and HoDs are setting the priority on their own and many times it is causing delay to project critical activities. Interestingly this was the **primary reason for which PMO Function was setup!**
- As per Venugopalan other department do not listen to our priorities and they decide their own priority and no one reset that priority. To get the work done I personally need to the followup and even after the work do not happen on time.

Discussion with VN & Swami Ji & understanding the requirements
Working on Reference number of Actions in Issue register

Input from Suresh Ji

- [X] Critical issue dashboard (10cr and above job)
- [X] Weekly billing monthwise for year
- [X] Session on what questions to ask to ensure PMO is effective & working
- [X] CDD & LD problem is still there so effectiveness is poor.

30-Apr-19, Tue

- Fixing Missing Project Sales Manager in the System. Old Project managers removed by VN from the system
- Project Online to PowerBI sync stopped on 12-Mar-19. Since then you were seeing old reports! It is strange no followup happened for 48 days.

Problems found in the System

- VN Deleted old pm name from system and it lead to orphan project (including old projects)
- VN Replaced old name with new one and caused different problem
- VN Deleted Project Consultant Name Master list from the system
- Project Detail Page was not having any components

2-May-19, Thu

- Started fixing data issues for all projects such as PM, SM, Project Type, Customer Name, Master/Non-master, milestone marking, critical activity marking, abnormal duration activity.

3-May-19, Friday

- Retrospective. Identifying Expectations & Items to Measure the Effectiveness.

4-May-19, Sat

- Fixing Missing Project Customer
- Retrospective. PMO Road ahead.

Problems found in the System

- Deleted old SM name from the system. It cause many completed project with no SM.
- Over write existing SM name with something else. It cause even completed project with new SM.

6-May-19, Mon

- Logeshwaran Project- Critical & Milestone Activities Marking in all his projects

- Fixing Wrong Project Name issues
- Fixing Missing Min & Max LD info. Safely marked it zero and shown to Ethiraj.
- Fixing Missing Project Sales Manager
- Created Master Customer List
- Fixing Missing Project Customer
- Timesheet data imported into system
- Conceptualizing New Dashboard
- Issue Register sync in PowerBI was failing because of invalid entry into date and number fields of Issue Register

7-May, Tue

- New dashboards

8-May, Wed

- Data cleaning in system
- New dashboards

9-May, Thu

- Demo and training for Suresh Ji

10-May, Fri

- Demo for Swamiji

Section 3: List of Parameters for PMO Effectiveness Measurement

Thought following Parameters can help measuring PMO Effectiveness. Most of these either implemented or refined and regrouped in existing dashboards.

Effectiveness [Filter Project Completion Status & PM]

1. Projects CDD Missed in %
2. Projects LD Incurred in %
3. % of Project LD Incurred Against Business Done
4. # of Milestone Missed in %
5. # of Critical Work Missed in %
6. # of Projects Delay Variance in % (missed planned date)
7. # of Projects Duration Variance in % (missed duration estimated)
8. # of Active Issues
9. # of Active Risks
10. # of Actions Missed Duedate (Past, Current// Ownerwise)
11. Average Action Closure Age

Quality of Planning [Filter Project Completion Status & PM]

1. # Projects Missing Work Order Date
2. # Projects Missing PM
3. # Projects Missing SM
4. # of Projects with Retired PM
5. # Projects WO Baselined
6. # Activities WO Baselined
7. # Of Projects Where Qty, Value Assigned to Master, Purchase Project
8. # of Project Project Quantity & Dispatch Quantity Mismatch
9. # of Projects Project Value & Dispatch Value Mismatch
10. # Projects Activities with Assigned Local Resources

11. # Projects Activities without Resource Assignment
12. # of Milestone
13. # of Critical Work
14. # of Projects Badly Planned
15. # of Projects BudgetWork Mismatch
16. # of Activities WO Department

Quality of Tracking [Filter Project Completion Status & PM]

1. Actions
 1. Number of MoM Recorded
 2. Number of Actions
 3. Average # of Actions Per Meeting
 4. Average Action Closure Age
 5. Average Option Action Age
 6. Avg # of Action Closed WO Closure Date
 7. Average Actions WO Actionee
 8. Action Categories
2. Risk, Issues
 1. Active Issues
 2. Average Issue Closure Age
 3. Average Issue Resolution Age
 4. Issues WO Owner
 5. Active Risks
 6. Risks WO Owner
3. Project Plan
 1. Average Project Modification Age
4. Activities
 1. Department Commitment Index
 2. Project Activity Updation Index
 3. # Critical Activities for This Week
 4. # Milestones for This Week

Finance

1. # of Pending ABG
2. # of Pending PBG
3. LD Can Attracted
4. LD Attracted
5. LD Actual Paid

Work Analysis

1. Work Type
2. Project Phasewise
3. Material Type
4. Work Type & PM
5. Work Volume and PM
6. Weekwise PM Work
7. Resource Profile
8. Total Project (Status Wise) (Only single & tag. No master, purchase, test, internal project)
9. Project % without LD condition

QoT-Extn

1. Milestone Planning
2. Critical Work Planning
3. Badly Planned
4. Project Modification Age

Section 4: Recommendations

These Recommendations will help organization to avoid system problems and see a reliable/cleaner dashboards

- Put all retrospective action in SharePoint action register and track to closure
- Don't keep any space in "project name" field
- When employee leave then do not delete his/her record from the system. Make the record inactive or bring down to make invisible or talk to system developer.
- An SOP is agreed with Balaji of IT for Entry and Exit of Project Management Team members. **Balaji need to send email to me.**
- Timesheet and budget data will be synced by Balaji of IT every 2 week. Before exporting data from Oracle Balaji should make sure that Timesheet entry by the Production is complete for that period.
- Do not mark normal project as master project and vice versa.
- Do not put invalid entry in columns (like Text in Number or Number in Date fields. It will fail sync to PowerBI)
- Do not leave city, state, country of delivery location empty in dispatch view, enter it correctly
- Update "Project Completion Status" column as soon as any change in a project phase happens
- During planning update resource also. For example if Fitter work is done by Subcontractor then mark SC-Fitter or SC(Work) do not just update the progress of the work. Similarly if SC(Work) is done by TEAM resource change the resource from SC(Work) to Fitter or whatever resource did the work. In this step I recommend that we need to ensure sync between resource doing work, resources available in the system and resources assigned to activities in the system.

Section 5: List of Dashboards

A complete list of dashboard is given below.

- *New - Newly created dashboard in Phase4 Consulting
- All the dashboards are updated to standardize the filters
- Cleaning of columns of many dashboards done so that they are not showing information which is available on other similar dashboard
- Major focus was on creating some dashboard which can show effectiveness, efficiency from higher level

Update List of Dashboard Reports

1. BirdsEye View
2. Dispatch es Weekwise (*New)
3. Dispatch Datewise
4. Revenue
5. Action Register
6. Action Register Summary (*New)

7. Issue Tracker
8. Risk Tracker
9. Resource Capacity
10. Resource Capacity Weekwise
11. Resource Capacity Projectwise
12. Project Budget, Plan & Actual
13. Work Trend Data
14. Work Trends (Graph)
15. Work Progress, Plan, Actual
16. Work Progress %WC
17. Finance KPI
18. Finance Milestone
19. ABG-PBG
20. LD
21. Resourcewise Work
22. Work Progress %Complete
23. S Curve
24. SV (Schedule Variance)
25. Variances (Work & Schedule)
26. WV (Work Variance)
27. SV-CDD Alert
28. Milestone
29. Milestone Summary (*NEW)
30. Critical Work
31. Critical Work Summary (*NEW)
32. Material Tracking 1 (Need by Date) [All Material for Project]
33. Material Tracking 2 (Need by Date) [A Particular Material for All Project]
34. Weekly Tasks (All for Subcontracting Work)
35. Weekly Taskcard Production
36. Weekly Taskcard for Non Production
37. MOP
38. Master Dispatch List
39. Check Project Updation
40. Commitment Tracker Data
41. Commitment Tracker Heatmap (*NEW)
42. Project Modification Heatmap (*NEW)
43. Work Type
44. Resource Profiling
45. PM1 (*NEW)
46. PM2 (*NEW)
47. PM3 (*NEW)
48. Customer (*NEW)
49. Customer Geo (*NEW)
50. QoP - Quality of Planning (*NEW)
51. QoT- Quality of Tracking (*NEW)
52. QoT.2 - Quality of Tracking (*NEW)
53. Effectiveness (*NEW)
54. Workflow Analysis (*NEW)
55. Project Info (*NEW)
56. Activities Info (*NEW)
57. Technical Note (*NEW)
58. Helpsheet 1
59. Helpsheet 2

Section 6: Retrospective

1. Presentation of Retrospective Meeting already shared
2. Outcome of Retrospective Meeting already shared. I hope they have been put in action register and tracked to the closure