

Project Metrics

How to Monitor Project Progress

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HEALTHCARE MANAGEMENT CONSULTANTS

IT and Health Care: Current State

- Healthcare is in a continual state of change
- IT Projects are changing from a well defined event to a complex, ongoing process
- Projects are larger and more complex : integration, number of components, workflow or processes impact, regionalization
- Increased amount of change in organizations
- Heightened pressure to “prove” that value was achieved
- Increased complexity of IT Infrastructure and application portfolios
- Decreased tolerance for performance problems



Are we there yet?

"Well, we are just under budget but we have another two months to go which is a month more than we planned but that is OK because the scope blew out a bit early on and that was all approved. It has taken more hours than we expected to complete the current phase. Given everything, I think we will probably be all right."



What are “Metrics”

Metrics:

Provides measuring units to depict values, thresholds, constraints, scope, duration, maximums, minimums, averages

Measures:

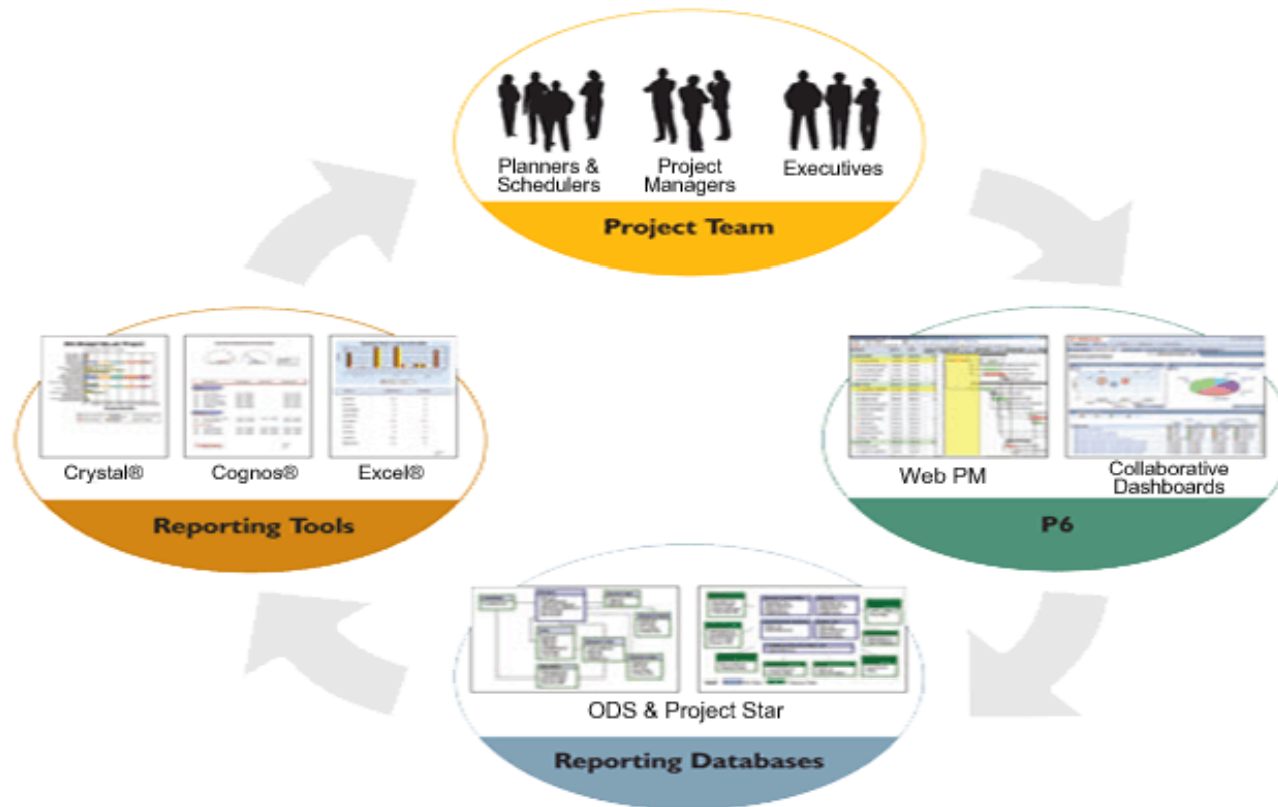
Represent information used to establish a common understanding of status, condition, and position of something

Metrics in Action

CAL



Project Metrics – The Model



Enterprise Reporting Databases - Cycles (Sample Diagram)

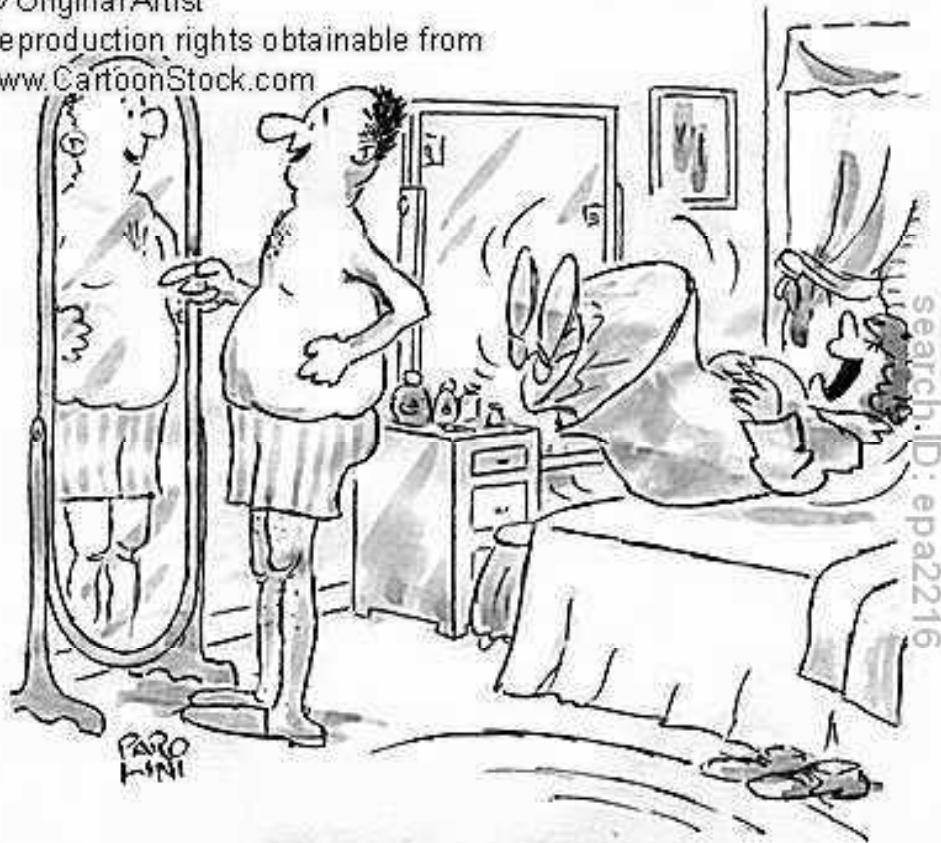
Project Metrics – The Reality

- Keep it simple
- The reporting metrics must add value, not just add work
- Have a clear vision and expectations of project success
- Reflect the essence of project objectives
- NO extraneous information
- One metric does not fit all the requirements for a project or situation
- One metric does not fit all projects
- What works for **your** organization for **this** project?



Where to Start?

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"AN EXTRA POUND HERE AND THERE A LITTLE SAG A LITTLE BULGE. BUT I'M STILL THE SAME HUNK YOU MARRIED. RIGHT, ETHEL?"

An Assessment

Step 1: Stakeholder Assessment

- What is the level of detail required: CEO vs CFO
- Frequency of reporting
- What is their comfort zone for different types of metrics?
- **Know your audience**



Step 2: Project Assessment

- Short term v.s. long term
- External or internal budget
- External reporting requirements (C.H.I. eHealth funding)
- Use of external v.s. internal resources or both
- Vision of success
- Articulate project objectives
- Understand the scope
- Define deliverables

Strategies for Defining Metrics

- Evaluate strategies by project and stakeholder requirements
- Evaluate options for metrics with S.M.A.R.T. criteria:
 - Specific
 - Measureable
 - Achievable
 - Relevant
 - Timely



Project Metrics: The Top 5

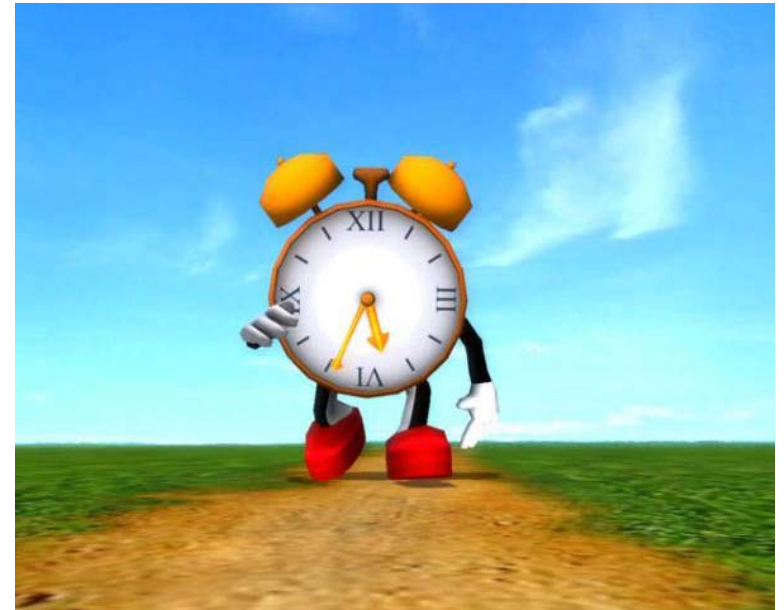
- Time (schedule)
- Cost (budget)
- Resources
- Scope
- Quality
- Actions (Action items Outstanding)

Summary Project Status						
Based on the color legend below, indicate green, yellow, or red for the reporting periods of each item. Any item classified as red or yellow requires an explanation in the comment boxes that follow this section. Additional priority items can be added to the list for status reporting.						
Select one color in each of the Reporting Period columns to indicate your best assessment of:	Last Reporting Period [MM/DD/YYYY]			This Reporting Period [MM/DD/YYYY]		
	Red	Yellow	Green	Red	Yellow	Green
1. Overall Project Status	Red	Yellow	Green	Red	Yellow	Green
2. Schedule	Red	Yellow	Green	Red	Yellow	Green
3. Budget (capital, overall project hours)	Red	Yellow	Green	Red	Yellow	Green
4. Scope	Red	Yellow	Green	Red	Yellow	Green
5. Quality	Red	Yellow	Green	Red	Yellow	Green
	Red	Yellow	Green	Red	Yellow	Green



Are we on Time?

- % task complete
- % tasks incomplete
- % tasks over due
- # milestones met on time
- # milestones outstanding
- Set caution and red flags at critical points, for example:
 - the project has an issue when 80% of tasks are incomplete when project is half completed



Project Cost Management: Are we on Budget?

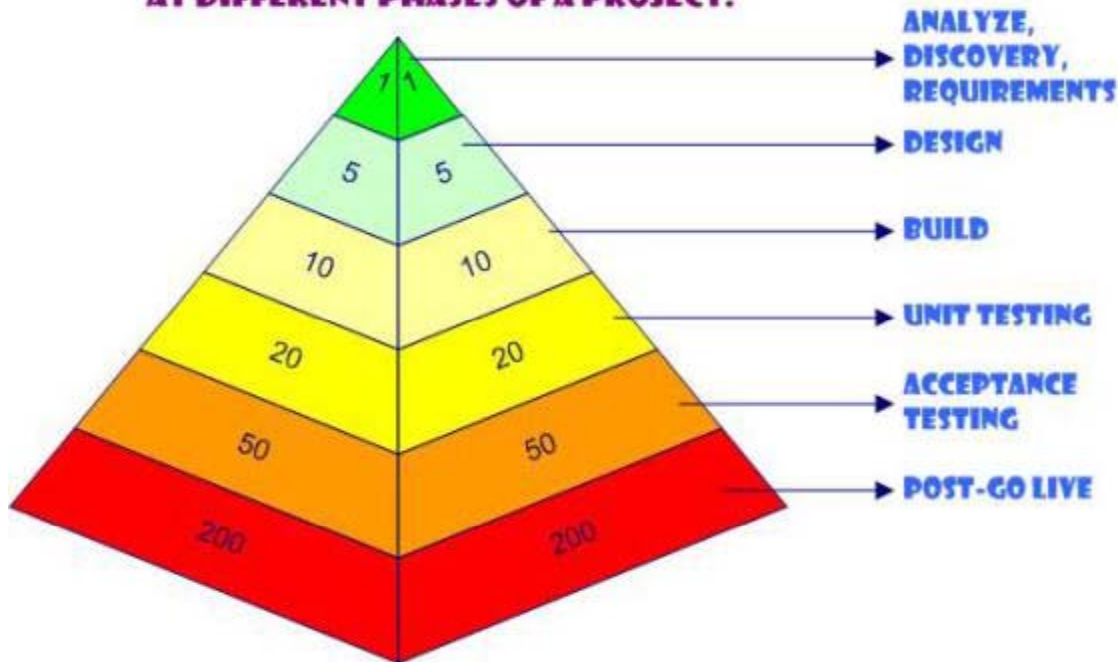
- Create a cash flow, e.g.
 - Project budget of 18,000 for a 6 month project = \$3,000 per month
- Create a month by month of expenditure
- Assign project codes for analysis to measure time spent on specific projects

Resources

- Too many?
- Not enough?
- The right resources?
- Availability
- Right skill set: consultant may be more expensive per hour, but able to complete the work faster
- balance

Scope

RELATIVE COST OF PERFORMING SCOPE CHANGES AT DIFFERENT PHASES OF A PROJECT.



- Implement formal change management documentation
- # of change requests

Quality

- Have the deliverables been met?
- Have the objectives been achieved?
- Are there many outstanding issues?
- Are the users (customers) unhappy?



Actions

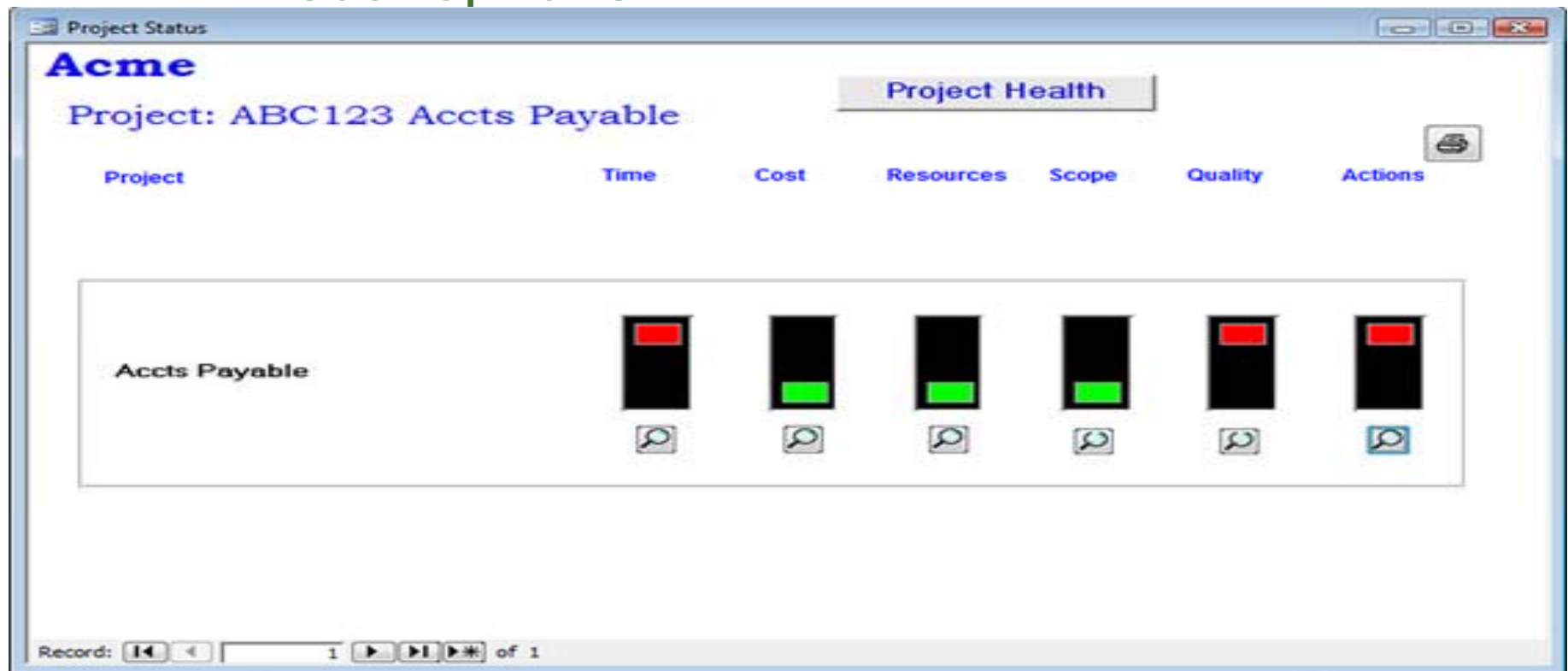
- # outstanding items on task list
- # remaining items on task list
- # show-stopper items open before go live
- # issues on Risk Log
- Create an action item for every problem, assign a responsible person and date for resolution
- Key: how many actions are overdue!

Collection

- Lots of software options:
 - Eclipse
 - Workspace.com
 - Project Insight
- Use the tools you have: excel, MS Project
- Investigate options to maintain internal project hours (true cost of projects)
- Keep it simple

Reporting Options

- Keep it focused and specific to the audience
- Visual options



Reporting Options: Status Report

Project Metrics		
Measure	Numbers	Percentage
Tasks Complete	[13 of 54]	[24%]
Tasks in Progress	[26 of 54]	[48%]
Tasks not Started	[28 of 54]	[52%]
Time spent	[18 of 86 weeks]	[21%]
Time remaining	[68 of 86 weeks]	[79%]
[Project Specific Measure]		

Balanced Score Card Reporting

Financial Perspective

Project Costs
Business Value

Customer Perspective

On time delivery
Final product usability
Workflow issues
Client satisfaction

Internal Business Processes

Improved work processes
Reduced or reallocated staff
Improved clinical
communication
Reduced Length of Stay

Learning and Growth

Improved data quality
Improved access to clinical
information

Dashboard Reporting

steelray project analyzer

File Tools Help

New... Load...

Projects

- Website Development
- Engineering
- Production

Reports

- Monthly Scorecard
- Top Ten
- Excel Analyzer Scorecard
- Float Distribution Report
- Projects Matrix
- Hard Constraints Report

Project Report

Analyze

Scoring Results Page

Save Copy

Website Development

Project: R:\My Documents\Project Files\Website Development.mpp 4/16/2009

Report: Monthly Scorecard

● Effort Tasks	(30 tasks)	↓	75.0%
● Actual Finish Before Actual Start	(0 tasks)	↓	Compliant
● Actual Start / Finish Dates in the Future	(0 tasks)	↓	Compliant
● Baseline Execution Index	(0 tasks)	ⓘ	
● Baseline Vertical Schedule Integration Error	(5 tasks)	↓	5
● Delinquent Tasks	(0 tasks)	↓	Compliant
● Incomplete Critical Tasks	(12 tasks)	↓	92.3%
● Incomplete Tasks	(13 tasks)	↓	43.3%
● Milestones	(5 tasks)	↓	12.5%
● Missing Predecessors	(0 tasks)	↓	0.0%
● Missing Successors	(6 tasks)	↓	40.0%
● Out of Sequence Tasks	(0 tasks)	↓	Compliant
● Predecessors Complete, Task Not Started	(2 tasks)	↓	5.7%
● Should Start Tasks	(20 tasks)	↓	57.1%
● SPI Too High	(0 tasks)	↓	0.00
● SPI Too Low	(0 tasks)	↓	0.00

Dashboard navigation: Details, Tasks, Resources, Risks, Issues, Changes, Reports, Documents

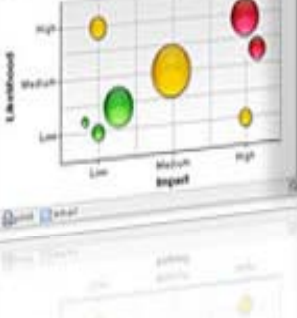
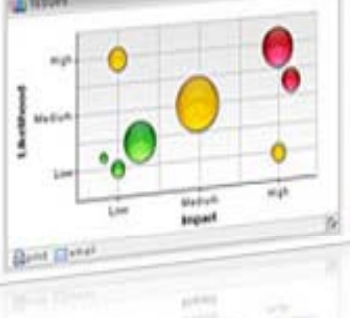
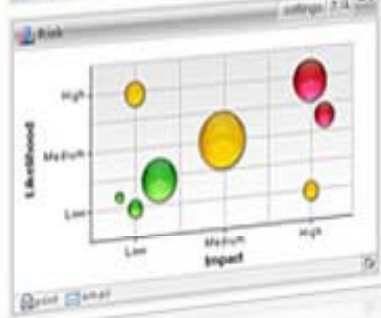
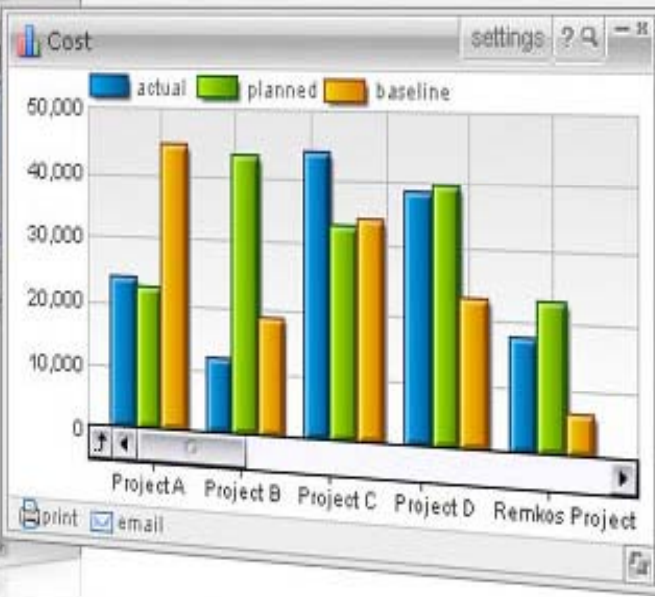
Health: Time, Cost, Resource, Progress, Efficiency, Risks, Issues, Changes



Health

Project	Time	Cost	Resource	Progress	Efficiency
Project A	Red	Green	Yellow	Green	Green
Project B	Red	Red	Green	Yellow	Yellow
Project C	Red	Red	Red	Red	Red
Project D	Green	Green	Green	Green	Green
Remkos Project	Yellow	Yellow	Yellow	Yellow	Yellow
Jasons Project	Green	Green	Green	Green	Green

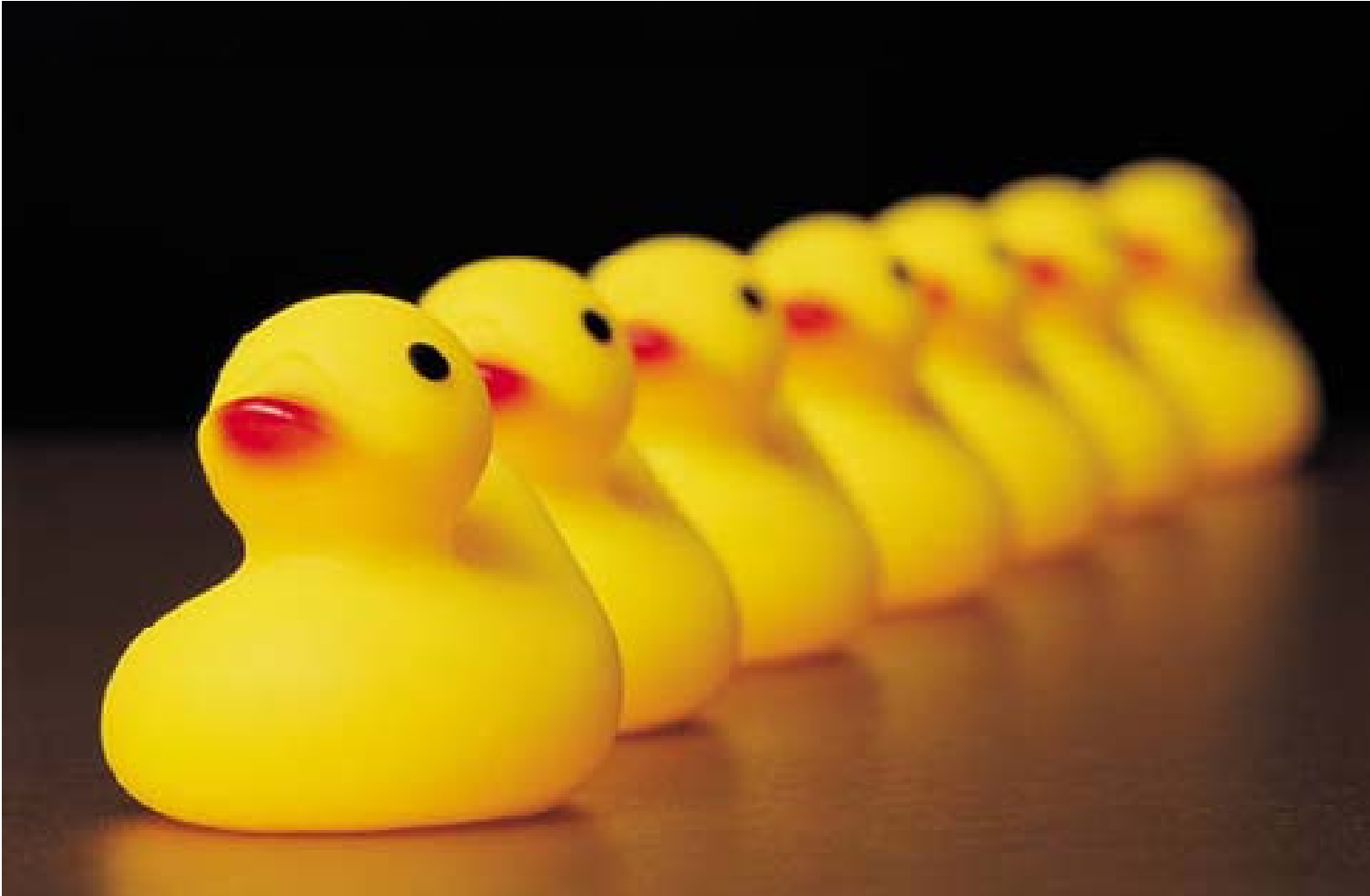
print email



PM Dashboard



Questions?





Thank You

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