

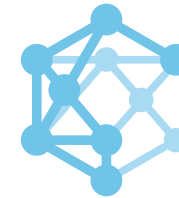
Assured  
Outcome  
Delivery



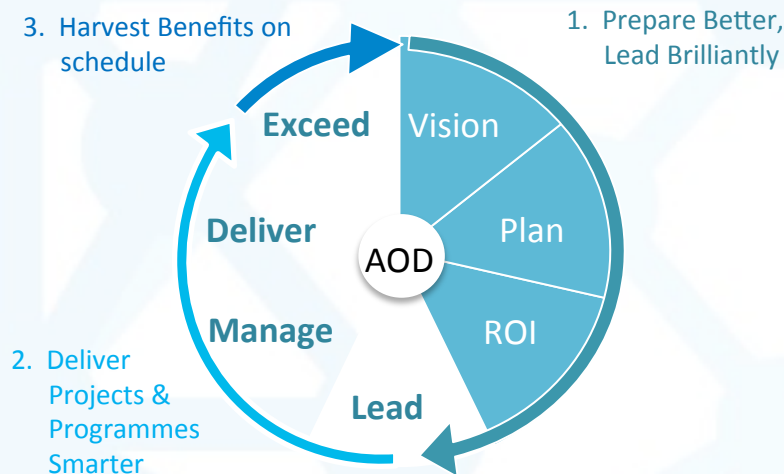
# Accelerating Start-Up with Std. Reports



Learning from experience\*\*  
and ODN's Implementing  
Smarter approach  
(incorporating ezPMO\*\*\*)



Assured  
Outcome  
Delivery



- \* Assured Outcome Delivery
- \*\* Prepare Better!
- \*\*\* pronounced easyPMO

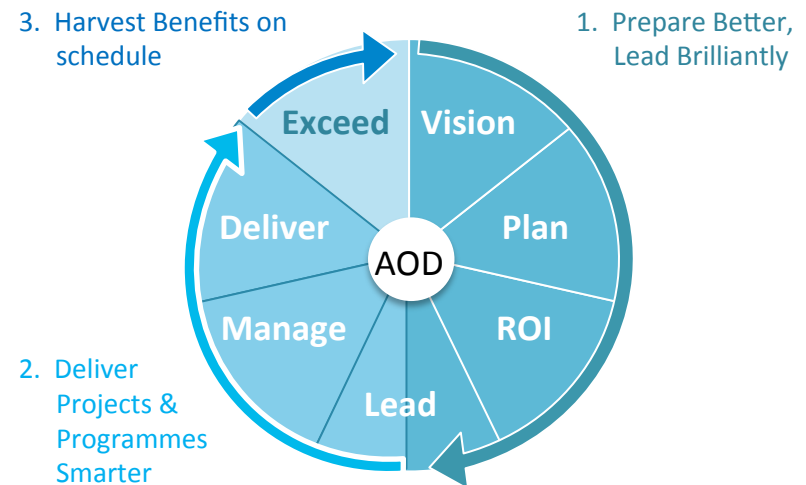
How to Accelerate  
PMO Set up and  
increase control  
effectiveness with  
AOD \* and



[www.outcomedeliverynetwork.com](http://www.outcomedeliverynetwork.com)

# Accelerating Project and Programme Set-Up....

- Learn from ODN Members experience to address the set up issues we all know
- Spend enough time planning and preparing to increase confidence and capability in the outcomes we deliver with AOD
- Using 'standardised' reporting and governance templates developed by ODN Members
- Sharing the experience and lessons from all involved.....and adding this to the proven ezPMO toolset



# ezPMO Set Up

Each element of source data updated by PMs

**Risk and Status Reporting**

This screenshot shows an Excel spreadsheet with columns for 'Risk ID', 'Description', 'Severity', and 'Status'. A callout box labeled 'Status Reporting' points to a specific cell in the 'Status' column.

Note – this process represents a – the actual control

2 PMO uses Report Control Centre to generate Powerpoint report

**Report Control Centre**

- Content of reports
- Creation of KPI and metrics

**Planning**

This screenshot shows a Gantt chart for a project named 'Wine tasting fundraiser'. The chart displays task bars with their durations and dependencies. A callout box labeled 'Planning' points to a task bar.

updates source Resource Management

**90 day plan**

This screenshot shows a 90-day plan for a 'Wine tasting fundraiser'. It includes a Gantt chart for 'Event Location' and 'Food Plan' across months from September to December. A callout box labeled 'Change the parameters of the report to see different information' points to a dropdown menu. Another callout box labeled 'Show RAG status for activity' points to a table of activities with RAG (Red, Amber, Green) status indicators.



4

Additional ad-hoc materials added to report

Report issued for use in relevant forum

- Board
- Workstream
- Project



Reporting uses a PowerPoint template file that contains the branding for the design of reports that are generated.

Pre-built templates, incorporating SMEs Right to Left Plans, Tipping Points and reporting frameworks, resource schedules and PMO analytical tools.....How would you like to start change programmes with these and AOD on day1



# How AOD and ezPMO will help improve your outcome delivery successes

- Benefit from tried and trusted project management artefacts, built around the AOD methodology.
- Turn-key solution that uses the technology in situ - with simple configuration to provide the information and format needed.
- View information in the right context –
  - what are the risks associated with a specific “Show Me”?
  - what plan activity contributes to CashPoints?
- Remove PMO set up cost and reduce report preparation time through automation.



# AOD ezPMO Report Template :

## Contents

Section	Page
Programme Plan Analysis	3
Programme 1	3
Programme Finance Analysis	4
Programme 1	4
Project Timeline	5
Project 1.2	5
Project 1.3	6
Project 1.4	7
Project 1.1	8
Overdue Plan Activity	9
Plan Activity Exceptions (Red/Amber)	10
Project Resource (Bandwidth) Analysis	11
Programme and Project Risk Analysis – vs ROI Connect Table	12



# AOD Reporting Overview

Using AOD's Sharepoint site, create Show Me Events, Tipping Points and Milestones, and set up inter-relationships:

Select a Show Me Event (using the select column), to see related Tipping Points. Then select a Tipping Point (using the Select column) to see related Milestones.

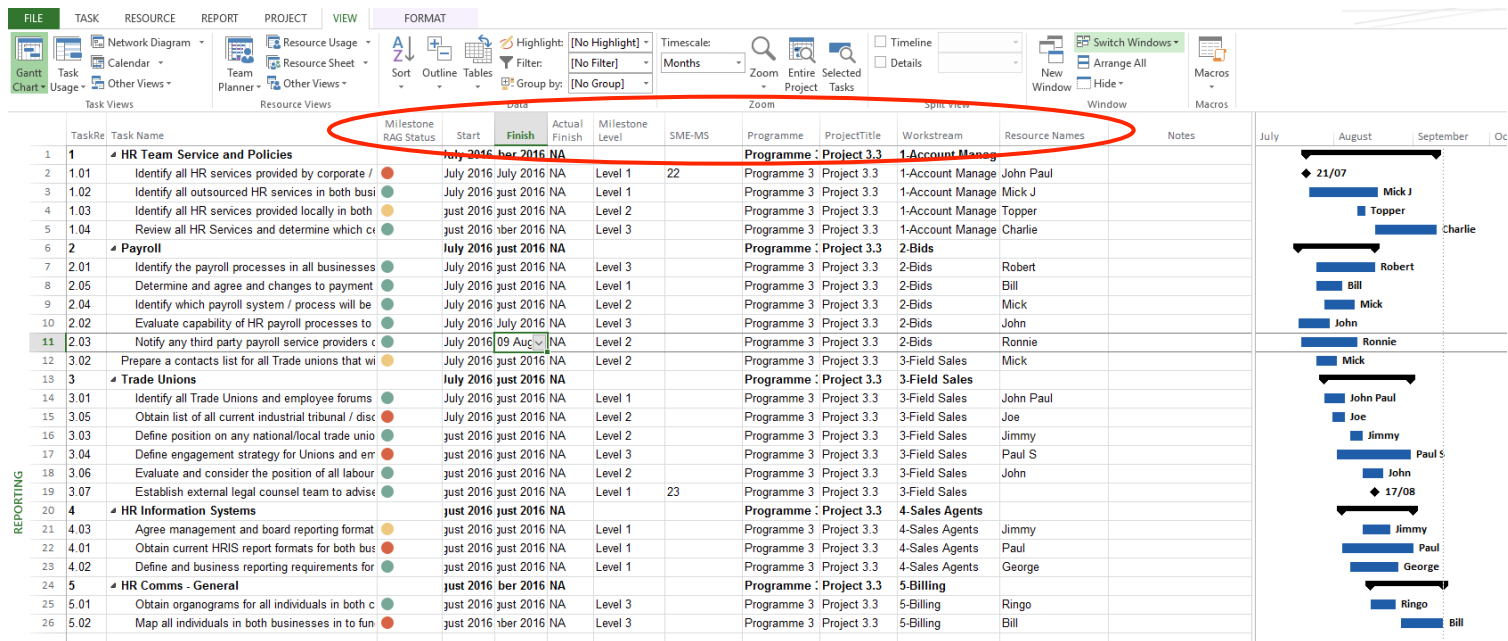
Show Me Events				Associated Tipping Points		Associated Milestones	
Select	Ref	Area	Title	Select	ID	ID	Milestone
<input checked="" type="checkbox"/>	1	Business Improvement & Innovations	Innovation improves performand and profitability.	<input checked="" type="checkbox"/>	1	1	Challenge workshop recommendations agreed.
<input checked="" type="checkbox"/>	2	Business Improvement & Innovations	Bright Ideas drives improvements.	<input checked="" type="checkbox"/>	2	2	Challenge workshop feedback day complete.
<input checked="" type="checkbox"/>	3	Lean	Back Office operations improvements.	<input checked="" type="checkbox"/>	6	3	Workshop prep included all ideas.
<input checked="" type="checkbox"/>	4	Lean	Stage Gate Automated Workflow.			4	Workshop prep included costs of failure.
<input checked="" type="checkbox"/>	5	Lean	BMS improves performance.				
<input checked="" type="checkbox"/>	6	Expert	Change Leadership and accountability for Delivering Change.				
<input checked="" type="checkbox"/>	7	Expert	AOD increases confidence.				
<input checked="" type="checkbox"/>	8	Expert	Project Change Design Authority.				
<input checked="" type="checkbox"/>	9	Trusted	Full utilisation of BIM across all prpject phases.				
<input checked="" type="checkbox"/>	10	Trusted	BIM reduces costs and duration.				
<input checked="" type="checkbox"/>	11	Trusted	Materials received (via mobile devices).				
<input checked="" type="checkbox"/>	12	Safety	Safety record used as BB USP.				
<input checked="" type="checkbox"/>	13	Safety	Mobile devices used effectively by site engineers.				

Then, using the pre-prepared Sharepoint Status Updates / Risk / Issues / Action logs, tag an item to a Show Me Event, Tipping Point or Milestone as well as a Programme or Project:

Office 365 interface showing a detailed view of a Show Me Event. The event is titled "Resourcing" and is associated with the "Stage Gate Automated Workflow" Tipping Point and the "MD FT&D personal endorsement" Milestone. The event description is "Risk: increasing supplier costs due to separation of group contracts." The event is assigned to Andy Thomas and has a risk status of Active. The event is categorized as "21 Category2" and has a due date of 9/16/2015 at 12:00:00 AM. The event is related to the "SPM induction primer defined" Milestone.

# AOD Reporting Overview

MS Project plan templates ensure the relevant fields are available to support reporting. Tasks can be associated with a Show Me Event Milestone:





# AOD Reporting Overview

ezPMO reporting provides a simple, easy to use, configurable tool that transforms disparate sources of data into meaningful intelligence that can provide an insight into a Show Me Event, Programme or Project

**1. Import Data\***

**2. Apply any filters needed**

**3. Generate formatted, high quality report reports**

The interface includes sections for:
 

- Data Import:** Import All Data (Latest full import: 09/05/2016 12:24), Import Single Area (Select data: SPIssues, Latest import: 12/05/2016 13:52).
- Key Programme Info:** Name, Date 1, Date 2, Date 3.
- Filters:** Show Me Event, Tipping Point, Hierarchy 3, WBS Filter, Programme, Project, Workstream, Graph Dates (Start, Finish).
- Reports:** Schedule reporting (Period Units: Weeks, Period length: 1, Report Date: 16/05/2016), Full Governance Report, Single Section Report, Report Section: Programme Finance Analysis.
- Show Data Tabs:** Show Report Config Tabs, Show Data Config Tabs, Show Slide Config Tabs, Show Other Config Tabs.

The reporting process takes minutes from a press of a button. Data is consolidated, enabling reports to be viewed through differing lenses, for example:

### Show Me Event Summary

Back Office operations improvements

Show Me Event

Event	Description	FI Date	LI Date	Total MS	Open	Prod	Amber
Back Office operations improvements	I am showing how our back office operators provide intelligent information, proactive challenge and support to the project teams to enable them to deliver to time, budget and with excellent client satisfaction.	30-11-15	09-03-16	7	7		

Tipping Points

Tipping Point	Description	Total MS	Open	Prod	Amber
Challenge: Virements changes signed off	Our challenge workshop feedback day was well received with attendees from all functions who agreed the proposed changes.	0	0		
Accurate estimates for senior stakeholders	We got senior stakeholders group confirmation that the proposed process changes would enable them to deliver accurate estimates.	4	4		
Intelligent information provided for back office	Law support has our back office challenge, provide intelligent information, proactive challenge and support to the project teams to enable them to deliver to time, budget and with excellent client satisfaction.	3	3		

SME Timeline

Project Title	Workstream	22 AUG 15	29 AUG 15	05 SEP 15	12 SEP 15	19 SEP 15	26 SEP 15	03 OCT 15
Project 1.1	1-Account Management			▲	▲	▲	▲	▲
	2-Sales			▲	▲	▲	▲	▲
	3-Field Sales			▲	▲	▲	▲	▲
Project 1.2	1-Account Management			▲	▲	▲	▲	▲
	1-Account Management			▲	▲	▲	▲	▲
Project 2.3	4-Sales Agents			▲	▲	▲	▲	▲

Risks

Project	Risk	P	I
Project 1.1	Separation Supplier Costs	High	High
Project 1.2	Bank Code change	High	High
Project 1.3	Payments TSA Internal Approval	High	High

Issues

Project	Issue	Conf	Res
Project 1.2	Lack of resources	High	High
	Business Engagement	High	High
	Client consent and objections	High	High
	Payments TSA Regulatory Approval	High	High

8/16 Summary: 12/06/16  
Filtered for All Items

### Programme Plan Analysis (Programme 1)

Activity by Project

RAG Status

Plan Activity By Level

Project Title	16-SEP-15				23-SEP-15				30-SEP-15				07-OCT-15			
	Plan	Open	Prod	Amber	Plan	Open	Prod	Amber	Plan	Open	Prod	Amber	Plan	Open	Prod	Amber
Project 1.1	75	23	23	3	8	21	21	1	7	4	18	18	3	2		
Project 1.2	17	0	0	0	1	10	10	2	2	2	2	2	1	1		
Project 1.3	18	0	0	0	2	4	4	3	3	7	7	1	2			

8/16 Summary: 12/06/16  
Filtered for Programme 1

# AOD Resource Analytics

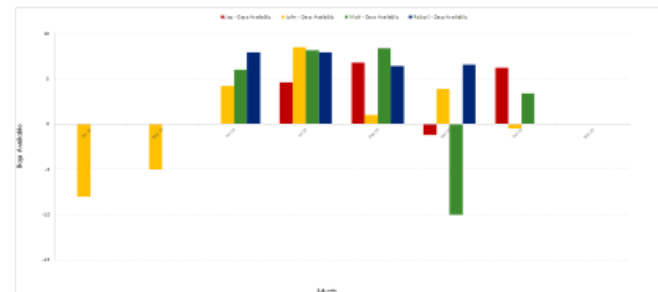
Assign resources to an MS Project plan using the standard functionality. Use the Group and Code fields to indicate the resource's resource type and source.

Task ID	Task Name	Start	Finish	Level	Resource	Group	Code
1	HR Team Service and Policies	July 2016	July 2016	NA	John Paul	PM	Supplier 1
1.01	Identify all HR services provided by contractor	July 2016	July 2016	NA	Mick J	PM	Supplier 1
1.102	Identify all enhanced HR services in both busi	July 2016	July 2016	NA	Paul	PM	Supplier 1
1.103	Identify all HR services provided locally in both	July 2016	July 2016	NA	George	PM	Supplier 1
1.104	Review all HR Services and determine which to	July 2016	July 2016	NA	Ringo	PM	Supplier 1
2	Payroll	July 2016	July 2016	NA	Charles	PM	Supplier 2
2.01	Identify the payroll processes in all business	July 2016	July 2016	NA	Mick J	PM	Supplier 2
2.05	Determine and agree on changes to payroll	July 2016	July 2016	NA	Bill	PM	Supplier 2
2.04	Identify which payroll system/process will be	July 2016	July 2016	NA	Mick	PM	Supplier 2
2.002	Evaluate capability of HR payroll processes to	July 2016	July 2016	NA	John	PM	Supplier 2
3.03	Identify any third party payroll service providers	July 2016	July 2016	NA	Robert	PM	Supplier 2
3.02	Prepare a contract for all third parties that are	July 2016	July 2016	NA	Mick	PM	Supplier 2
3	Trainees	July 2016	July 2016	NA	John Paul	PM	Supplier 2
3.01	Identify all Trainee Liaison and employee forms	July 2016	July 2016	NA	John Paul	PM	Supplier 2
3.05	Obtain list of all current related industrial relat	July 2016	July 2016	NA	John	PM	Supplier 2
3.03	Define position as any non-industrial trade and	July 2016	July 2016	NA	John	PM	Supplier 2
3.04	Define engagement strategy for liaison and co	July 2016	July 2016	NA	John	PM	Supplier 2
3.06	Evaluate and consider the position of all labor	July 2016	July 2016	NA	John	PM	Supplier 2
3.07	Establish internal right counsel teams to advise	July 2016	July 2016	NA	John	PM	Supplier 2
4	HR Information Systems	July 2016	July 2016	NA	John	PM	Supplier 2
4.03	Obtain management and board reporting format	July 2016	July 2016	NA	John	PM	Supplier 2
4.01	Obtain current HRIS report formats for both bus	July 2016	July 2016	NA	John	PM	Supplier 2
4.02	Define and business reporting requirements for	July 2016	July 2016	NA	John	PM	Supplier 2
5	HR Contract General	July 2016	July 2016	NA	John	PM	Supplier 2
5.01	Obtain organizational for all individuals in both	July 2016	July 2016	NA	John	PM	Supplier 2
5.02	Map all individuals in both businesses to a ter	July 2016	July 2016	NA	John	PM	Supplier 2

Resource Name	Type	Material	Group	Code	Min Units	Std. Rate	Ovt. Rate	Cost/Use	Accru At	Base Calendar	Add New Column
John	Work		PM	Supplier 1	100%	£25.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Paul	Work		PM	Supplier 1	100%	£100.00/hr	£0.00/hr	£0.00	Prorated	Standard	
George	Work		PM	Supplier 1	100%	£125.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Ringo	Work		PM	Supplier 1	100%	£50.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Mick J	Work		PM	Supplier 1	100%	£75.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Robert	Work		PM	Supplier 1	100%	£100.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Charles	Work		PM	Supplier 2	100%	£25.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Bill	Work		PM	Supplier 2	100%	£75.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Topper	Work		PM	Supplier 2	100%	£75.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Joe	Work		PM	Supplier 2	100%	£100.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Mick	Work		PM	Supplier 2	100%	£25.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Paul S	Work		PM	Supplier 2	100%	£100.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Jimmy	Work		PM	Supplier 3	100%	£125.00/hr	£0.00/hr	£0.00	Prorated	Standard	
John Paul	Work		PM	Supplier 3	100%	£50.00/hr	£0.00/hr	£0.00	Prorated	Standard	
Robert	Work		PM	Supplier 3	100%	£75.00/hr	£0.00/hr	£0.00	Prorated	Standard	

Standard pre-configured reports can be generated that aggregate resources and provide an insight into over-allocations or availability:

Resource Availability (Singer)



# Example : Back Office Operations Summary Report

## Show Me Events:

Workstream	Show Me Event	FI Date	LI Date	Total MS	Open	Red	Amber
Back Office operations improvements.	I am shown how our back office operations provide intelligent information, proactive challenge and support to the project teams to enable them to deliver to time, budget and with excellent client satisfaction.	30-11-15	09-02-16	7	7	3	

## Tipping Points:

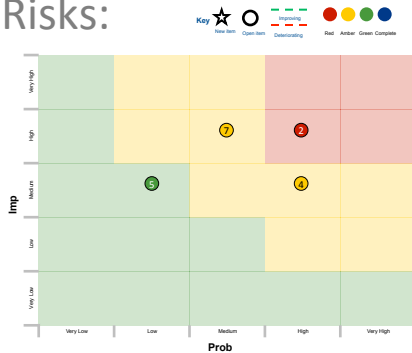
Tipping Point	Description	Total MS	Open	Red	Amber
Challenge Workshops changes signed off.	Our challenge workshop feedback day was well received with attendees from all functions whp agreed the proposed changes	0	0		
Accurate estimates for Senior Stakeholders.	We got senior stakeholder group confirmation that the proposed process changes would enable them to develop accurate estimates	4	4	3	
Intelligent information provided for back office ops,	I am shown how our back office operations provide intelligent information, proactive challenge and support to the project teams to enable them to deliver to time, budget and with excellent client satisfaction.	3	3		

## SME Timeline:

Milestones ▲ L1 ▲ L2 ▲ L3 ▲ L4 ▲ L5 → Dependency → Variance to baseline → RAG Red Yellow Green Complete Not Announcement Report Date Day 1 Day 2

Programme	ProjectTitle	22 AUG 16	29 AUG 16	05 SEP 16	12 SEP 16	19 SEP 16	26 SEP 16	03 OCT 16
Programme 1	Project 1.1			▲ Determine the extent to which joint account planning can be entered in to prior to Day 1 (08/09) ▲ Obtain bid management processes for both businesses (08/09) Brief sales team regarding selling techniques and guidelines (03/10)				▲
	Project 1.2			▲ Agree the impact of the enlarged group on the average Balance Sheet spreads and margins (06/09)				
Programme 2	Project 2.3		▲ Identify all HR services provided by corporate / group parents in both businesses and evaluate the implications of the deal on these services. (25/08) Agree management and board reporting formats and for New Co. (16/09)					

## Risks:



Programme	Project	Risk	P	I
Programme 1	Project 1.1	Separation Supplier Costs	Red	Yellow
		Transformation	Yellow	Red
	Project 1.2	Bank Code change	Red	Red
	Project 1.3	Payments TSA: Internal approval	Green	Yellow

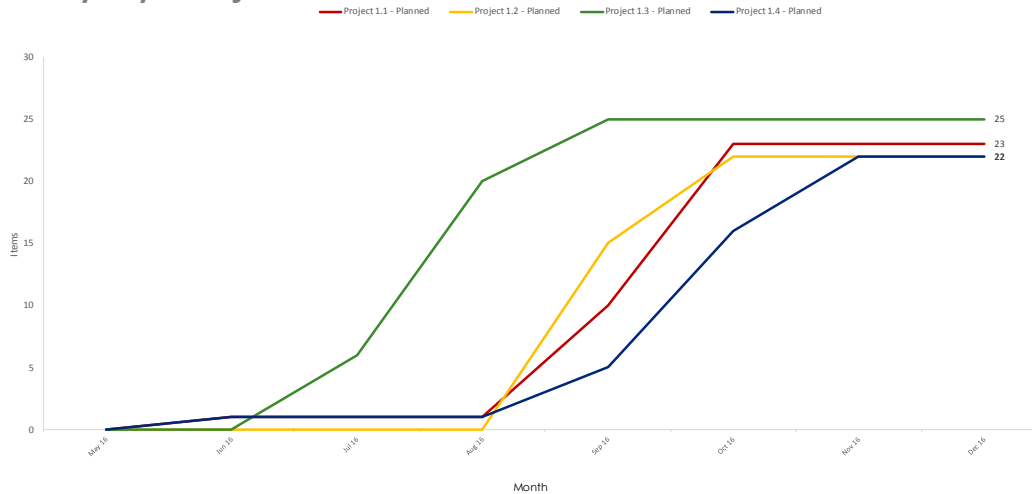
## Issues:



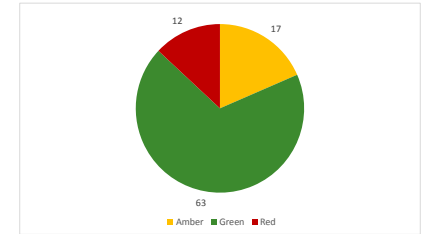
Programme	Project	Issue	Control	Imp
Programme 1	Project 1.2	Lack of resources	Red	Red
		Business Engagement	Red	Green
		Client consent and objectors	Red	Green
		Payments TSA: Regulatory Approval	Red	Yellow

# Programme Plan Analysis (Programme 1)

## Activity by Project:



## RAG Status:



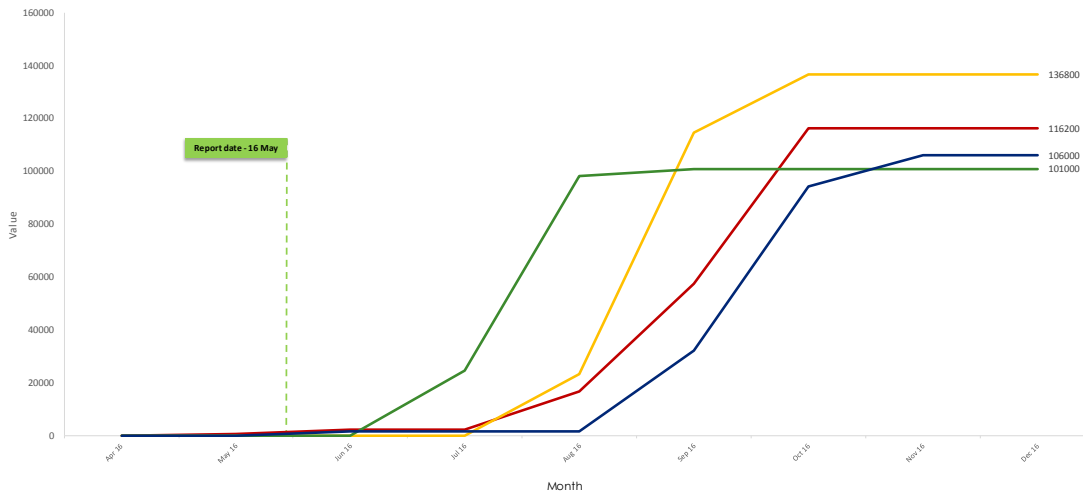
## Plan Activity By Level:

Total # of Tasks	% Complete	Level 1						Level 2						Level 3					
		Total	Open	Comp.	Late	Amber	Red	Total	Open	Comp.	Late	Amber	Red	Total	Open	Comp.	Late	Amber	Red
72		23	23			3	5	31	31			9	4	18	18			5	2
		Level 1 % complete				Level 2 % complete				Level 3 % complete									

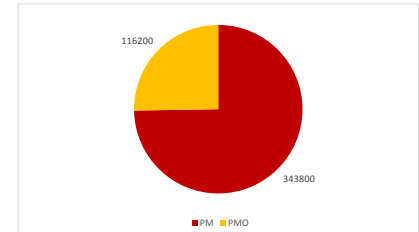
ProjectTitle	Total # of Tasks	% Complete	Level 1						Level 2						Level 3					
			Total	Open	Comp.	Late	Amber	Red	Total	Open	Comp.	Late	Amber	Red	Total	Open	Comp.	Late	Amber	Red
Project 1.2	17		5	5			1	1	8	8			1	2	4	4			1	1
Project 1.3	20		8	8			1	1	7	7			3		5	5			1	
Project 1.4	17		5	5			1	1	10	10			2	2	2	2			1	1
Project 1.1	18		5	5				2	6	6			3		7	7			2	

# Programme Finance Analysis (Programme 1)

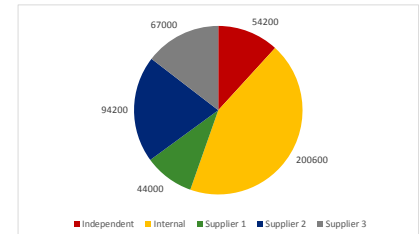
Finances by Project:



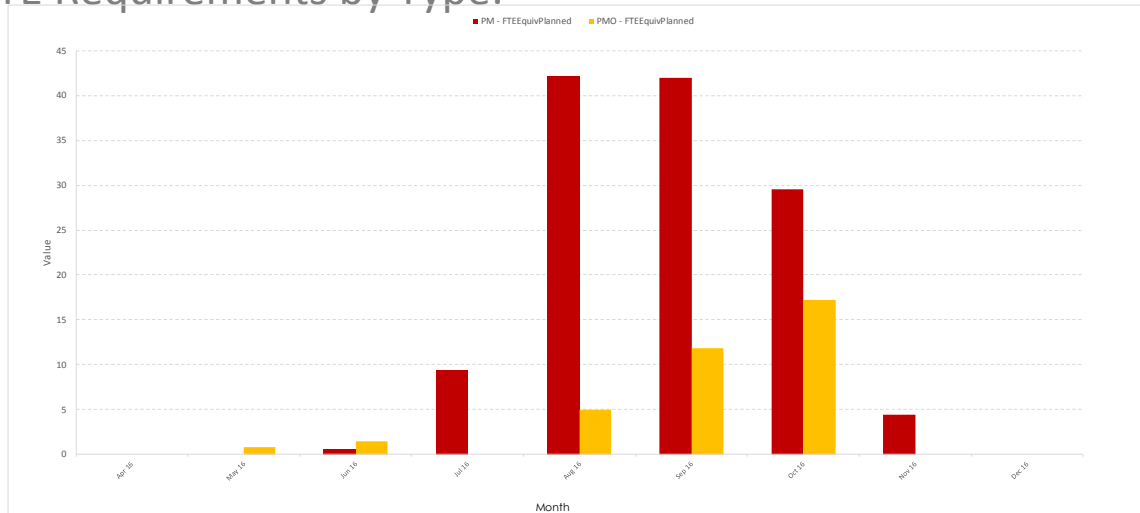
Finances by Type:



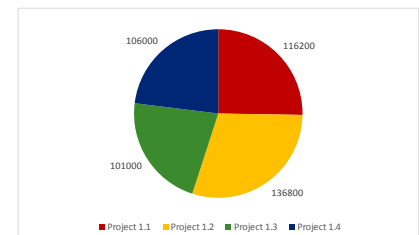
Finances by Source:



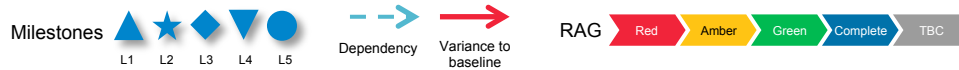
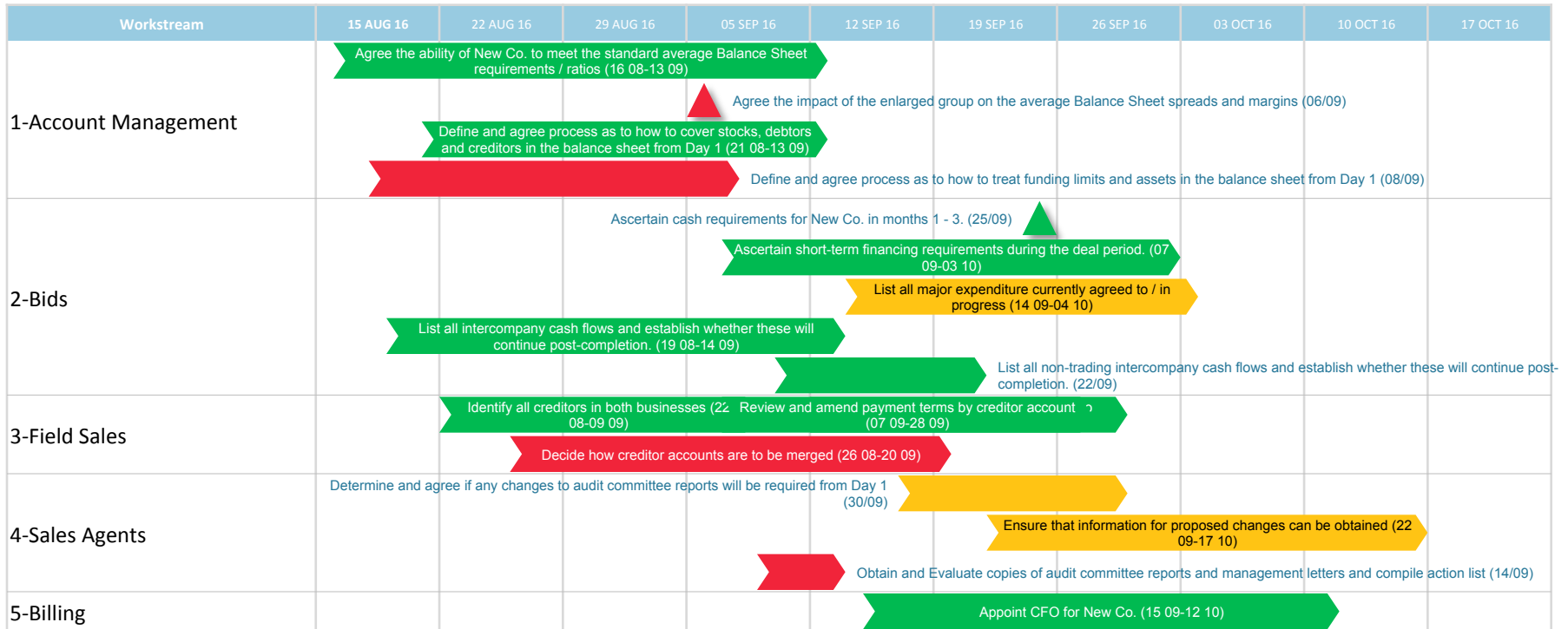
FTE Requirements by Type:



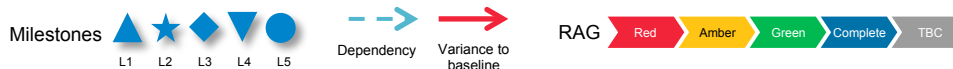
Finances by Project:



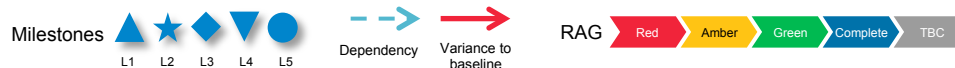
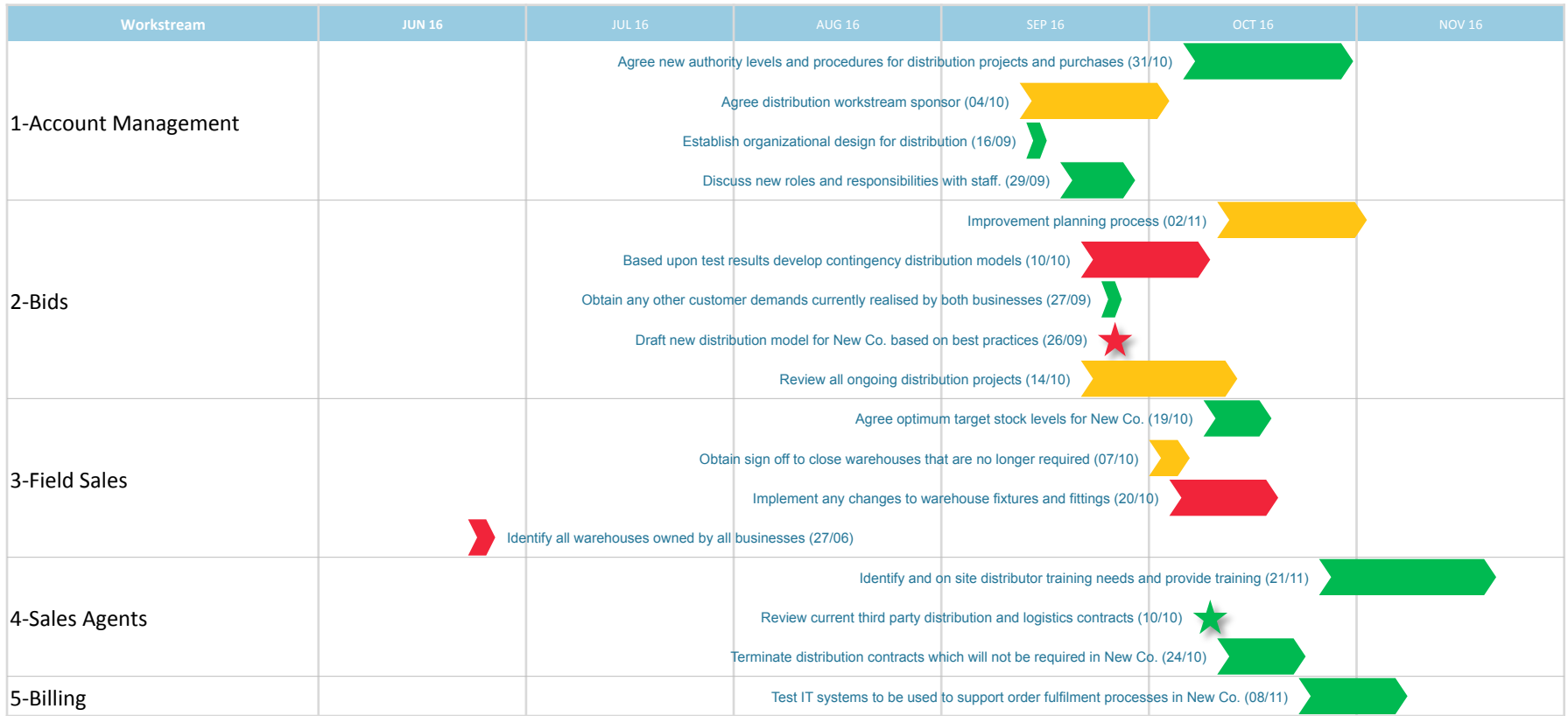
# Project Timeline (Project 1.2)



# Project Timeline (Project 1.3)



# Project Timeline (Project 1.4)





# Project Timeline (Project 1.1)



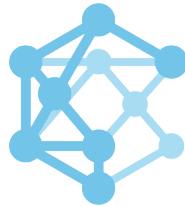
# Plan Activity Exceptions (Red/Amber)

ProjectTitle	Workstream	Ref	Activity	Start	Finish	Status	Comment	Owner
Project 1.1	1-Account Management	1.02	Obtain details of all customer accounts, segmentation processes, KPIs and sales channels	10-09-16	14-09-16	●		George
	2-Bids	2.01	Obtain bid management processes for both businesses	08-09-16	08-09-16	●		
		2.03	Sign off bid processes for New Co.	28-09-16	14-10-16	●		Ronnie
	3-Field Sales	3.04	Brief sales team regarding selling techniques and guidelines	03-10-16	03-10-16	●		Joe
		3.03	Define and Agree selling techniques and guidelines timetable and inputs for New Co.	24-08-16	15-09-16	●		Topper
		3	Field Sales	31-05-16	14-06-16	●		Paul S
	4-Sales Agents	4.01	Decide if New Co. will use sales agents	02-10-16	03-10-16	●		Joe
5-Billing	5.01	Receive notification from Fiance / IT confirming any changes to billing systems for Day 1	03-10-16	13-10-16	●		Paul	
Project 1.2	1-Account Management	1.04	Agree the impact of the enlarged group on the average Balance Sheet spreads and margins	06-09-16	06-09-16	●		
		1.01	Define and agree process as to how to treat funding limits and assets in the balance sheet from Day 1	18-08-16	08-09-16	●		John
	2-Bids	2.03	List all major expenditure currently agreed to / in progress	14-09-16	04-10-16	●		Mick
	3-Field Sales	3.02	Decide how creditor accounts are to be merged	26-08-16	20-09-16	●		Mick J
	4-Sales Agents	4.02	Determine and agree if any changes to audit committee reports will be required from Day 1	17-09-16	30-09-16	●		Paul S
		4.03	Ensure that information for proposed changes can be obtained	22-09-16	17-10-16	●		George
4.01		Obtain and Evaluate copies of audit committee reports and management letters and compile action list	09-09-16	14-09-16	●		Paul	
Project 1.3	1-Account Management	1.02	Identify all outsourced HR services in both businesses and evaluate the implications of the deal on these services.	17-07-16	19-07-16	●		Jimmy

# Plan Activity Exceptions (Red/Amber)

ProjectTitle	Workstream	Ref	Activity	Start	Finish	Status	Comment	Owner
Project 1.3	3-Field Sales	3.05	Obtain list of all current industrial tribunal / disciplinary matters identified as part of due diligence.	26-07-16	11-08-16	●		Joe
		3.03	Define position on any national/local trade union and staff representation agreements	02-08-16	25-08-16	●		Bill
		3.06	Evaluate and consider the position of all labour contracts currently under negotiation.	07-08-16	19-08-16	●		Charlie
		3.04	Define engagement strategy for Unions and employee forums	28-07-16	03-08-16	●		George
	4-Sales Agents	4.01	Obtain current HRIS report formats for both businesses	30-07-16	22-08-16	●		Ringo
Project 1.4	1-Account Management	1.01	Agree distribution workstream sponsor	12-09-16	04-10-16	●		Ronnie
	2-Bids	2.05	Improvement planning process	11-10-16	02-11-16	●		Topper
		2.04	Based upon test results develop contingency distribution models	21-09-16	10-10-16	●		John
		2.03	Draft new distribution model for New Co. based on best practices	26-09-16	26-09-16	●		Charlie
		2.01	Review all ongoing distribution projects	21-09-16	14-10-16	●		John Paul
	3-Field Sales	3.02	Obtain sign off to close warehouses that are no longer required	01-10-16	07-10-16	●		Paul
		3.03	Implement any changes to warehouse fixtures and fittings	04-10-16	20-10-16	●		Mick
		3.01	Identify all warehouses owned by all businesses	23-06-16	27-06-16	●		Robert





Outcome  
Delivery  
Network

# Can EZPMO Accelerate your controls? Contact us:

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