



WHITE PAPER

The Top 6 Reports PMOs Need to Answer Stakeholder Questions

Take the Pain and Labor Out of Reporting



Ask PMOs what they dread most, and generating time consuming, painful, laborious reports are sure to be at the top of their list. While we can't wave a magic wand and remove reporting from the job description, we can make it easy, seamless and fast- right out of the box.

Projectric reports allow PMOs to consistently demonstrate their value to executive management using clear, qualitative measurements. In fact, top PMOs use our reports to show stakeholders how they boost company performance as a whole by improving organizational alignment, decrease the number of failed projects, increase ROI, and finish projects on time and on budget.

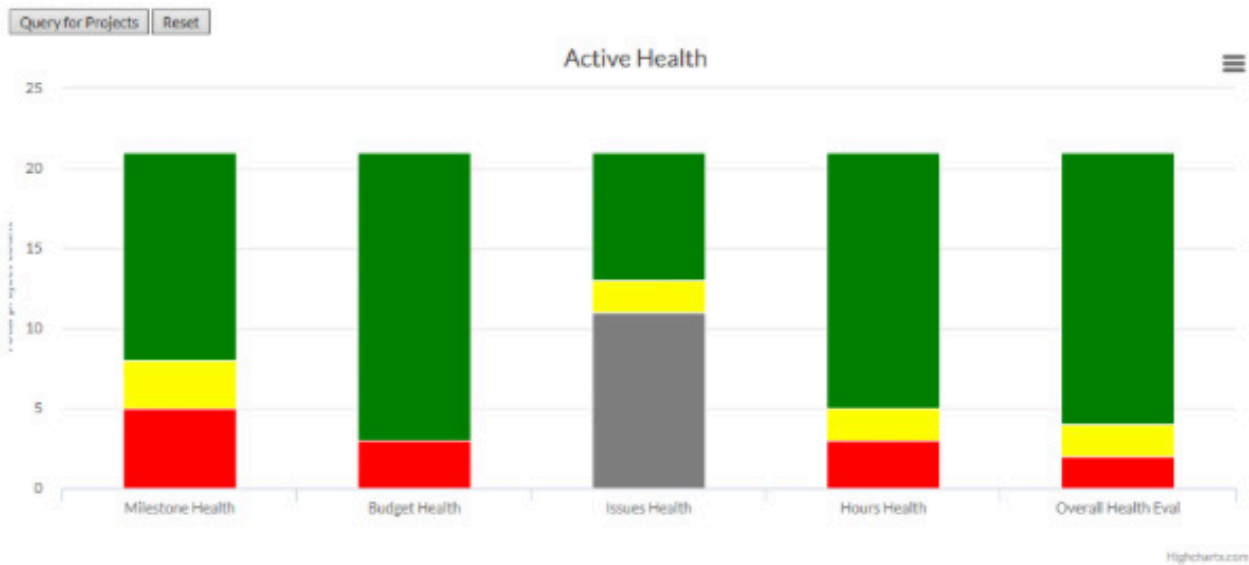
Projectric's reports are designed to answer questions that stakeholders repeatedly ask, such as:

- ***"How are we doing?"***: Overall Portfolio Health Report
- ***"Why didn't my project take priority?"***: Scoring Risk/Reward Report
- ***"Are we on time?"*** Delivery Status Report
- ***"Are we optimizing our processes?"***: Process Management & Workflow Reports
- ***"Are we optimizing our resources?"***: Resource Capacity Management
- ***"Are we on budget?"***: Budgeting Report



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Overall Project Health Report:



List Chart Active Health

21 Items - Show 10 Items

| Project Title | Number | Life Cycle | Priority | Project Manager | M | B | I | H | Ox | Original Roll Out | Current Roll Out | % |
|------------------------------------|--------|------------|----------|-----------------|---|---|---|---|----|-------------------|------------------|-------|
| Add 401k Management to Intranet | 136104 | Active | 🟢 | Agnes Church | 🔴 | 🟢 | 🟢 | 🔴 | 🟢 | 2014-01-16 | 2013-11-30 | 45.00 |
| New development project | 87888 | Active | 🟡 | Nelly Grosman | 🟢 | 🟢 | 🟢 | 🟢 | 🟢 | 2013-05-16 | 2013-09-02 | 35.00 |
| Upgrade Water Cooler | 1030 | Active | 🟡 | Roy Haynes | 🟡 | 🟢 | 🟢 | 🔴 | 🟢 | 2013-06-28 | 2013-07-01 | 15.00 |
| Expand CRM to West Coast | 5009 | Active | 🟢 | Brooks Daniel | 🔴 | 🟢 | 🟢 | 🟢 | 🟡 | 2013-04-01 | 2013-06-21 | 45.00 |
| Renew IT Licenses | A102 | Active | 🟡 | Jackie Allen | 🟢 | 🔴 | 🟢 | 🟢 | 🟢 | 2013-05-15 | 2013-06-14 | 65.00 |
| Bug Check Project | 1020 | Active | 🔴 | Beth Daniel | 🟢 | 🟢 | 🟡 | 🟢 | 🟢 | 2013-05-28 | 2013-06-01 | 55.00 |
| ERP Data Conversion | 1022 | Active | 🟡 | Beth Daniel | 🔴 | 🔴 | 🟢 | 🟢 | 🟡 | 2012-07-10 | 2013-06-01 | 60.00 |
| Internet Cluster Manager (ICM) | 1012NC | Active | 🔴 | Tom Haas | 🟡 | 🟢 | 🟢 | 🟢 | 🟢 | 2012-12-04 | 2013-05-15 | 35.00 |
| Product Allocation Redesign | 992210 | Active | 🟡 | Tim Henman | 🔴 | 🔴 | 🟡 | 🟢 | 🟢 | 2013-03-15 | 2013-05-01 | 55.00 |
| Adding new projects - June 28 test | 01012 | Active | 🔴 | John Coblenz | 🟢 | 🟢 | 🟢 | 🟢 | 🟢 | 2018-07-19 | | 0 |

The Portfolio Health report is designed to quickly answer the most common stakeholder question: “So, how are we doing?”, by giving you a top down view of all your projects.

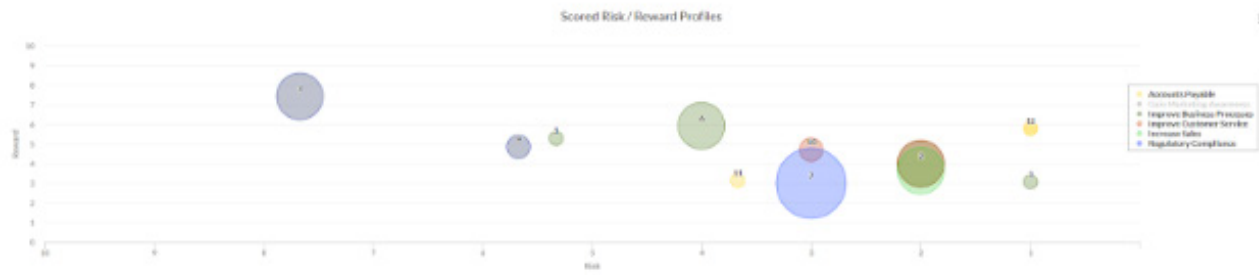
This report also helps PMOs:

- Identify and focus on low performing projects
- Quickly make informed decisions
- Spot potential issues or trends



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Scoring Risk/Reward Report:



List Chart Risk Reward

12 Rows - Show 10 Rows

| # | Project Title | Number | Project Manager | Work Flow State | Original Score | Risk Score | Reward Score | Initial Conditions |
|---|--------------------------------|--------|-----------------|-----------------|----------------|------------|--------------|--------------------|
| 1 | AD-403 Management to HR and | 136324 | Agnes Chait | initiated | 145.00 | 2.00 | 2.04 | Medium |
| 2 | Buy Order Project | 1307 | Beth Ouel | initiated | 220.00 | 2.00 | 4.00 | Medium |
| 3 | ERP Data Conversion | 1302 | Beth Ouel | initiated | 180.00 | 1.00 | 3.07 | Medium |
| 4 | Expand CRM for New Cases | 3007 | Brenda Ouel | initiated | 200.00 | 3.07 | 7.07 | Medium |
| 5 | Install Web to Host for Change | 094208 | Beth Ouel | initiated | 200.00 | 3.00 | 3.00 | Medium |
| 6 | Internal Order Manager (COM) | 332242 | Tom Kuo | initiated | 270.00 | 4.00 | 5.00 | Medium |
| 7 | New Development Limited | 17000 | Heidi Ostromer | initiated | 120.00 | 3.00 | 3.00 | High |
| 8 | New Employees Subcontractors | 094200 | 2020-10-01 | initiated | 200.00 | 4.00 | 5.00 | High |
| 9 | Product Marketing Redesign | 94270 | Tia Hannon | initiated | 170.00 | 3.47 | 4.04 | Low |

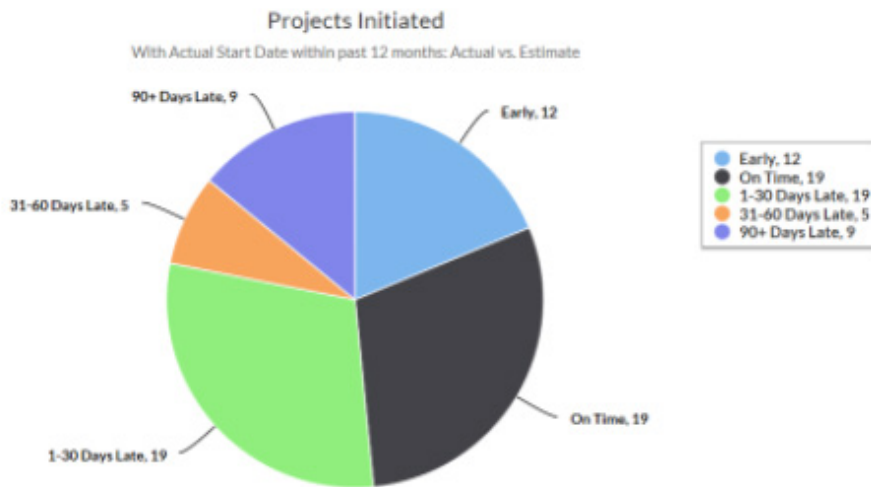
Equipping your PMO with an out-of-the-box scoring system that can be customized to your goals, is essential. Scoring takes the guesswork out of choosing and prioritizing projects by applying the same objective criteria to each project.

The Scoring Risk/Reward report helps PMOs answer the dreaded question, “Why didn’t my project take priority?”, by explaining which projects are most beneficial to the overall organization. Picking the wrong projects will cost the organization time, energy, and money.



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Delivery Status Report:



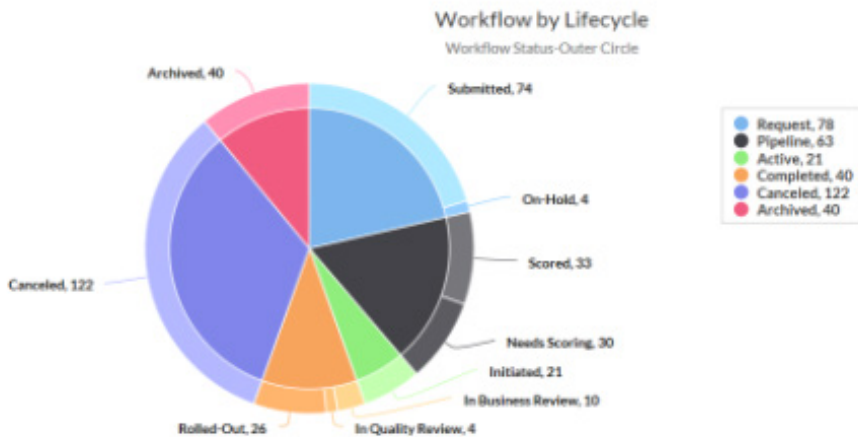
PMOs can face scope creep and other obstacles that make it tough to deliver on time. The Delivery Status report is designed to show the performance of completed projects based on their original time goals, and to identify projects that have fallen behind.

This report can also help PMOs adjust their goal setting to be more realistic from the start by looking at historical goals and trends.



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Process Management & Workflow Reports:



Workflow reports help answer questions around process optimization, milestones and project obstacles. With Projectric you can quickly see the number of projects by workflow and lifecycle stage, allowing for results oriented follow up.



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Resource Capacity Management:

Resource Utilization

All Departments | All Roles/Skills | All Projects | Update

41 Resources | Include Leads from Pipeline(*)

View Load Hours | View Monthly

Utilization

| Resource | Dept | Main Role/Skill | 05/28 | 06/04 | 06/11 | 06/18 | 06/25 | 07/02 | 07/09 | 07/16 | 07/23 | 07/30 | 08/06 | 08/13 | 08/20 |
|--|---------------------|--------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Tim Henman | IT | Project Manager | 100% | 130% | 130% | 130% | 130% | 130% | 130% | 130% | 130% | 130% | 130% | 130% | 100% |
| Active Projects: | | | | | | | | | | | | | | | |
| Install TVs in teacher lounge | | | 6% | 30% | 30% | 30% | 30% | 30% | 30% | 30% | 30% | 30% | 30% | 30% | 0% |
| Product Allocation Redesign 2013-05-01 | | | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Upgrade Water Cooler 2013-07-01 | | | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Internet Cluster Manager (CM) 2013-05-15 | | | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Ted Nash | Support Services | Support Services Analyst | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| David Allen | IT | Project Manager | 70% | 70% | 70% | 70% | 70% | 70% | 70% | 70% | 70% | 70% | 70% | 70% | 70% |
| Frank Black | Business | AAA | 60% | 60% | 60% | 60% | 60% | 60% | 60% | 60% | 60% | 60% | 60% | 60% | 60% |
| Maria Schneider | Network Engineering | Infrastructure | 40% | 32% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Jo Rose | Business | Developer | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% |
| Roy Haynes | IT | Project Manager | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% | 20% |
| Rex Stewart | IT | Developer | 14% | 35% | 35% | 35% | 35% | 35% | 35% | 35% | 35% | 35% | 35% | 35% | 0% |
| Howard Lederer | External | Infrastructure | 10% | 25% | 25% | 25% | 25% | 25% | 25% | 25% | 25% | 25% | 25% | 25% | 0% |
| Marty Fish | Business | Administration | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Tom Haas | Business | Business Systems Analyst | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

The term resource can refer to different types of assets, here we are focused on the most important one, your people. Firms today are under increasing pressure to deliver projects with shrinking timelines and budgets. As a result, it's more important than ever for resources to be fully utilized.

The Resource Capacity report shows stakeholders:

- A realistic view of both demand and capacity to deliver
- A view of what resources are needed for future projects, so they can facilitate headcount and make better hiring decisions
- How you are optimizing resources by prioritizing high value work with available resource capacity



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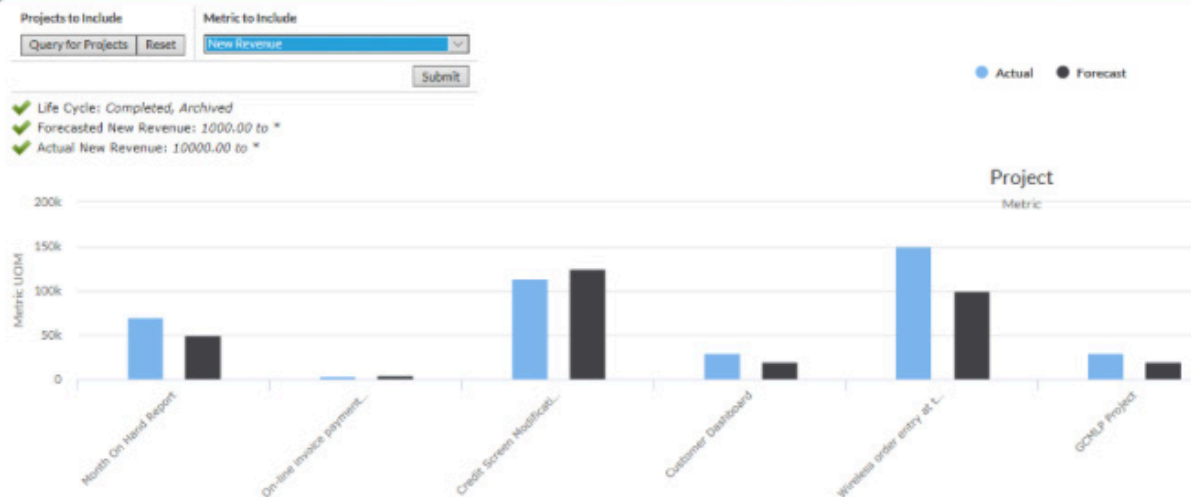
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Budgeting Report:

Metrics

Forecasted vs. Actual Metric Values (Completed projects with Current Rollout date within the past twelve months from today)



Budget plays an essential role in project and portfolio management. Improved financial control and spend tracking allows your organization to tackle more projects, and reach more goals. As part of the initial project setup, Project Managers need to define/baseline the project budget. This report will allow PMOs to quickly answer questions related to the cost of the project and to make sure they are alerted before costs get out of control.

With Projectric you get the most comprehensive, most actionable reports and analytics across all your portfolio management activities from start to finish. Want to see Projectric in action?

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