

Seven Consulting EPMO Capability Overview

Australia's Best
Program Delivery Company



Official Partner
of the



1. Program Delivery



We deliver some of Australia's most complex and challenging agile, traditional and hybrid programs. We work with our clients to understand their organisational and program characteristics. These inform how we design our delivery approach to produce the best outcome for our clients. The majority of our Consultants are scaled agile (SAFe) certified and we have over \$3bn of Agile and traditional Programs under direct management.

2. PMO Services



We provide PMO establishment and management, PMO analyst and scheduling services, and tools for some of the largest organisations in Australia.

3. Delivery Consulting



We provide delivery capability uplift, sponsor and project manager training, portfolio and program reviews to assist our clients improve their program delivery.

All of our clients are reference sites

Our Clients

Seven Consulting has a proven track record delivering critical outcomes for Australian organisations across industries and domains. 100% of our clients are reference sites.



Our clients and staff are our top priority

Client Satisfaction Survey Results

Year	Satisfaction rating	Survey questions
2019	99.08%	14,949
2018	98.65%	15,450
2017	99.08%	9,691
2016	98.94%	10,336
2015	99.35%	5,655
2014	99.26%	3,520

100% of our clients are reference sites

Staff Satisfaction Survey Results

Survey Date	Satisfaction rating
Dec'19	98.30%
Jun '19	98.82%
Dec '18	96.44%
Jun '18	96.40%
Dec '17	97.50%
Jun '17	98.30%



"It is clear that you only recruit PM's that are the best in the business"



"No fuss, just good, honest and consistent project delivery"



"Highly professional staff, great support from the broader organisation. Clear about what they are good at and stick to this"



"Very professional"
"Great consulting skills"



How do we get 98%+ client satisfaction?

Why all our clients are reference sites.



Hands on ownership



High staff engagement, low turnover with no contractors



At a minimum there is monthly Quality Assurance review of the consultant's work, done by either the Founder , Managing Director or PMO Practice Lead



Bench support available to all consultants at no cost to the client



Extensive mentoring and training support, strong IP and knowledge sharing



Holiday and sick leave cover for assignments



Strong in-house tooling to support consultants , clients and quality assurance

How our values impact our delivery?



Teamwork

Teamwork has to be at the core because you can't deliver big projects without great teamwork – we focus on ensuring that the Seven team, the client team and vendors work seamlessly together.



Transparency

Assumptions and poor communications kill projects, whereas openness is the foundation of good relationships and reliable delivery. We remain a completely independent consultancy.

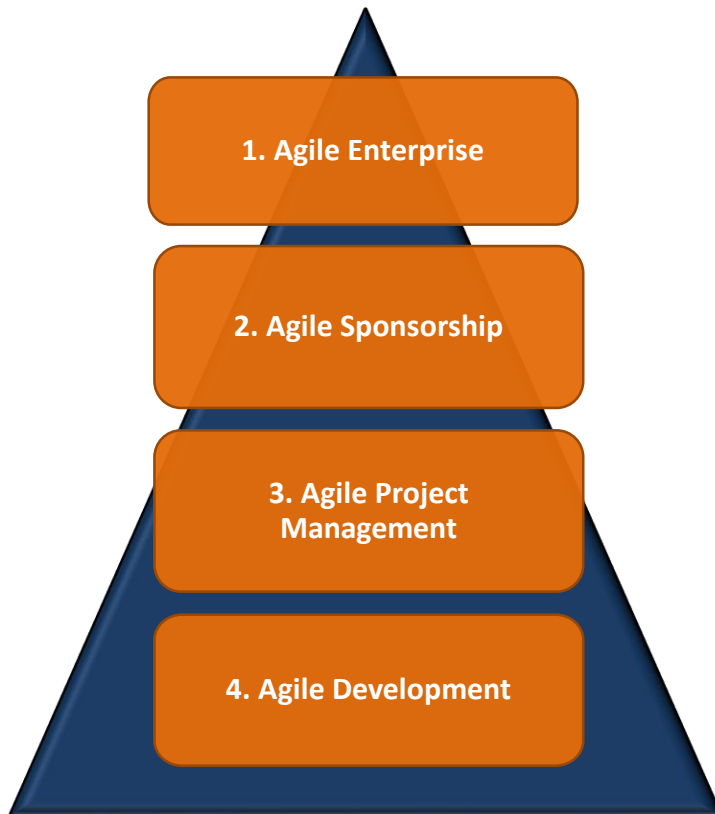


Delivery

A focus on outcomes focuses the team and grows confidence. With a confident attitude, expert personnel and effective teams we always deliver to clients high expectations.

The Integrated Agile Enterprise Framework

- Seven Consulting's Agile Project Enterprise Framework outlined below is a proven framework of integrated processes, tools and techniques focused on simpler, faster delivery & improved ongoing support of the delivered change.
- The key focus is the integration of speed of decision-making, planning and delivery of real benefits.



1. **Agile Enterprise (AE)** focuses on the cultural, procedural and people changes required to optimise, adopt, embed to sustain Agile models of project delivery. This includes an agile approach to strategic portfolio governance.
2. **Agile Sponsorship (AS)** requires executives to get closer to their projects, their project managers and their project teams. Single sponsors who must be flexible in making time available for face-to-face meetings and use simplified and face-to-face reporting lines. The Agile Sponsor is focused on benefits realisation.
3. **Agile Project Management (APM)** is an open, stakeholder-driven approach to project planning. While Scrum Masters and Product Owners focus on the detailed technical delivery, APM's must focus on stakeholder engagement, change management and related projects to ensure outwards as well as inwards management of the project.
4. **Agile Development (ADM)** involves a cultural as well as a procedural and technical change in how projects are planned and delivered. The coaching of project managers, business experts in how to setup and support Agile Development (Scrum, SAFe, etc.) is a critical factor for successful and sustained deployment of Agile Development Methods.

Traditional Program Delivery Tools

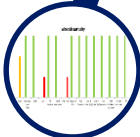
Health Check Score



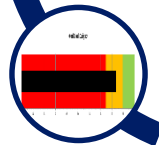
Health Check Tool

The Schedule Health Tool is designed to evaluate the quality, integrity and currency of a project schedule and suggests improvement areas.

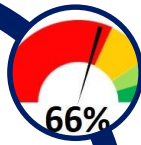
Schedule Maturity



Overall Schedule Quality Score



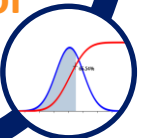
Project Confidence Level



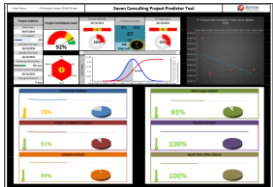
Critical Path Analysis



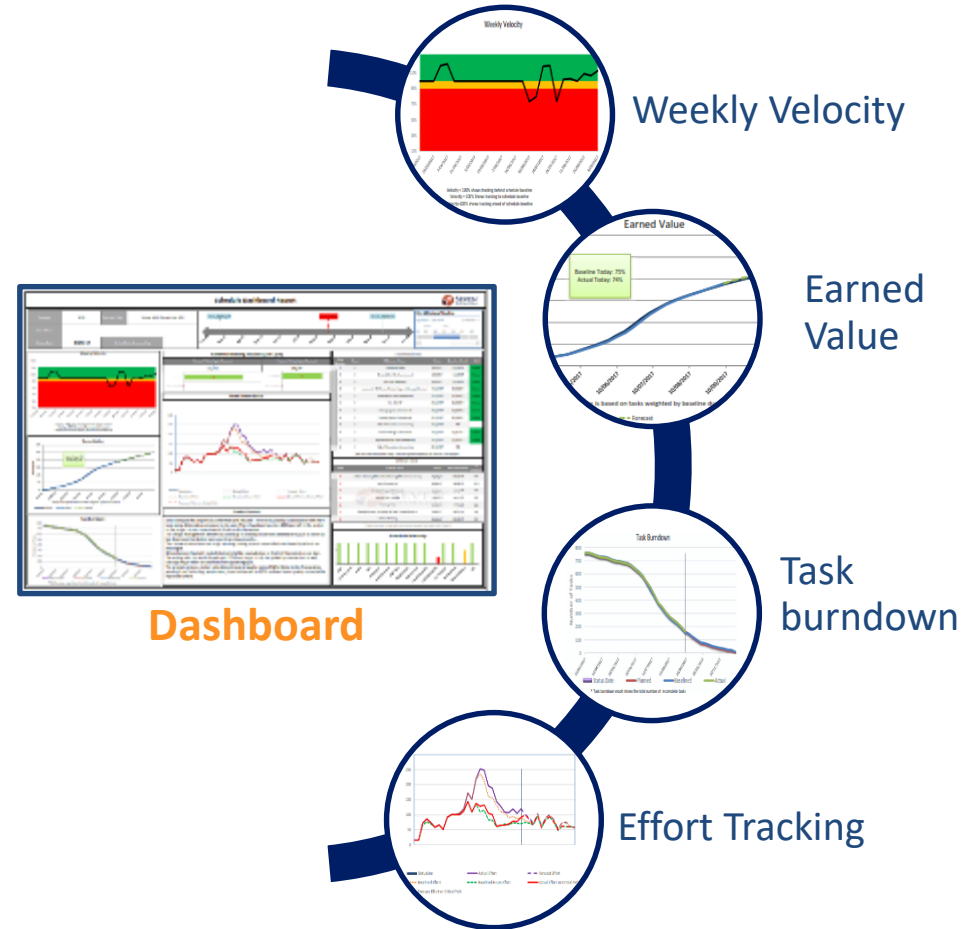
Cumulative Probability



Schedule Predictor

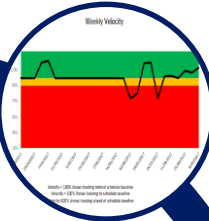


The Schedule Predictor Tool uses advanced algorithms to evaluate the precision of project forecast date and PM expectation finish date according to their actual performance. It provides a prediction trend line to suggest improvement areas.



Dashboard

Weekly Velocity



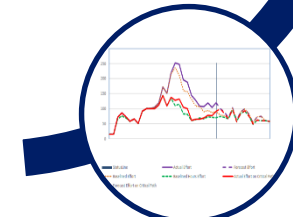
Earned Value



Task burndown



Effort Tracking



The Schedule Dashboard combines a number of reports to provide a 'Dashboard', or snapshot of agile projects progress. These include Weekly velocity, Earned Value, Task burndown and Effort Tracking.

Common PMO Challenges

Every PMO in every client receives a tailored solution. However our experience indicates that there are common themes in the issues clients experience.

Common Problems	Frequent Root Causes	Common Solutions	Services – How we can help
Poor project or program delivery	<ul style="list-style-type: none"> • Poor PMO control • Poor schedule control of lack of understanding of critical path 	<ul style="list-style-type: none"> ▪ Supplement PMO or delivery staff ▪ Upskilling PMO and project staff ▪ Better schedules 	<ul style="list-style-type: none"> ▪ PMO & Delivery support ▪ Outsource / Virtual PMO ▪ PMO Capability & Uplift ▪ Training & Tools
Lack of capability, capacity or a transient need for PMO	<ul style="list-style-type: none"> ▪ Unexpected or shorter term transformation workload ▪ Project or program workload that is unusual or outside normal expertise 	<ul style="list-style-type: none"> ▪ Supplement PMO or delivery staff 	<ul style="list-style-type: none"> ▪ PMO & Delivery support ▪ Outsource / Virtual PMO
Perceived lack of value or poor return on PMO investment	<ul style="list-style-type: none"> ▪ High base costs ▪ Ineffective processes or processes not followed ▪ Global or offshore teams not supported well ▪ Lack of clarity from Sponsors 	<ul style="list-style-type: none"> ▪ Cost reduction without impacting quality ▪ Improve processes or process compliance ▪ Improve PMO coverage 	<ul style="list-style-type: none"> ▪ PMO & Delivery support ▪ Outsource / Virtual PMO ▪ PMO Capability & Uplift ▪ Training & Tools
PMO not adding value or seen as “just policemen”	<ul style="list-style-type: none"> ▪ PMO not thinking strategically ▪ Lack of PMO focus on business benefits ▪ PMO too focussed on the “how” not the “why” 	<ul style="list-style-type: none"> ▪ PMO maturity development 	<ul style="list-style-type: none"> ▪ PMO Capability & Uplift ▪ PMO & Delivery support ▪ PMO Maturity Development

Seven Consulting's PMO Experience



CommonwealthBank

Netbank Replacement and Operations – Seven Consulting provided program management and PMO services for this \$70M+ replacement of the Bank's internet banking platform.

Core Banking Modernisation – Seven Consulting provided a range of services consisting of Program Management Office (PMO) including Scheduling services, Solution Architecture, Release and Migration Management, Business Readiness and Warranty Management. Seven Consulting also played a lead role in the Solution Centre. The program was valued at \$1.5B.

Delta – Seven Consulting managed the Program Office and provided the Technical Lead for the outsourcing of the Bank's credit card operations to HP (EDS) valued at \$50M.

E2E Home Loans Program – Seven Consulting managed the Program Office and provided the Technical Lead for this major revamp of the Bank's home loan processes and systems, a program valued at \$300M.

Nexus – Seven Consulting managed the PMO as well as providing Scheduling services for a program valued at \$70M.

Runway – Seven Consulting provided the Program Director, PMO management and Scheduling services for a program valued at \$100M.

Multi-Currency on Core – Seven Consulting provided Scheduling and

PMO services for a program valued at \$50M.

Supervisory and Monitoring (SAM) – Seven Consulting provided Program and PMO Management services for this major program for Colonial First State.

Regulatory Reform Program – Seven Consulting provided Release Management and Master Scheduling services.

Consumer Lending Program – Seven Consulting provided Technical and Program Office Leads.



Online Transformation Program – Seven Consulting provided the core Program Management team from Business Case to the first two releases (inc Program Director, PMO Director, Release Manager, Change Manager, Business Program Manager, Interfacing Systems Program Manager, Test Manager, Implementation Manager). This was the largest SIP (Strategic Investment Priority) program valued at \$300M.

Perimeter Security Program – Seven Consulting provided PMO Management and Scheduling services in support of the Bank's Program Manager.

BankSmart – Seven Consulting provided Master Scheduling services to this desktop transformation program.

HP New Operating Model – Seven Consulting managed the program office for the insourcing of mortgage processing from HP.

Seven Consulting's PMO Experience (Cont.)



Insurance Remediation Program - Seven Consulting provided program management services.



Blaze - Seven Consulting provided PMO management and scheduling services.

StrongerSuper Reporting Disclosure Program – Seven Consulting conducted a program assurance review and provided program management and PMO management services.

eRollovers – Seven Consulting conducting a project assurance review and provided program management and portfolio level scheduling services.



Project Mambo - Seven Consulting managed the BPAY Program Office, as well as the Business Readiness workstream and the Requirements / Solution Delivery workstream. Seven Consulting also established the program schedules.



PMO Establishment - Seven Consulting established project management governance process, tools and templates for Hutchison 3G Australia.

IT Outsourcing Consolidation – Seven Consulting provided a team (Program Director, PMO Manager, Project Managers, IT Service Management Consultant, Master Scheduler) to manage the transition of IT Support Services from IBM, Ericsson, HP, TCS to Tech Mahindra (multi-hundred million dollar outsourcing agreement).

IT (Data Centre) Transformation – Seven Consulting managed the start-up of a major program to transform VHA's IT cost base, including migration / outsourcing of all VHA infrastructure to new data centres as well as implement new virtualisation technology.



Catalina - Seven Consulting provided PMO management, end-to-end planning services and master Scheduling services for this major upgrade program being delivered by Ericsson to VHA.



Columbus (Structural Separation Program) – Seven Consulting provided PMO management services.

Seven Consulting's PMO Experience (Cont.)



Summit - Seven Consulting provided PMO Management and IT Management services for this business transformation program.

PMO Design and Implementation - Seven Consulting implemented PMO methodology (PMLC and SDLC), processes and governance framework for the incoming CIO and provided training to Project Managers and PMO.



Seven Consulting provided Enterprise PMO services as well as project managed their Credit Card Reconciliation project.



Loyalty program - Seven Consulting provided Program Management and Scheduling services.



Information Management Program - Seven Consulting conducted an initial Assurance Review, and then provided Program and PMO Management turnaround services for this critical program supporting Oil Search's joint venture with Exxon.



Outsourcing Program - Seven Consulting provided program management, PMO Management and Master Scheduling services.



Core Banking Transformation Program - Seven Consulting provided PMO Management services and Release Director for a \$250M SAP Implementation.



ANZ / National Bank Merger - Seven Consulting provided Program Director and PMO Management services.

PMO Creation



Delivery Turnaround at Stockland



Stockland had experienced an unsatisfactory level of projects being delivered late, over budget or failing to meet objectives.



Seven Consulting established a PMO framework and capability tailored to the Stockland culture and environment, and worked with staff and stakeholders to bring them on the journey.



Key business stakeholders see the benefits and become active champions of the PMO. Poor project delivery and 'Red' projects are a rarity.

Core Banking Platform



Transforming Core Banking at CBA



The largest banking platform program in a generation was planned to propel CBA ahead of the competition, still languishing on their 1970s based platforms.



For 6 years, Seven Consulting provided a variety of critical services to this massive \$1.5bn undertaking, from running the Program Management Office, to release and deployment planning, to project managing key releases of the program.



The new platform is a huge success, as customers love the real time banking, the simpler product set and the ease of the enhanced self service facilities, while staff enjoy simpler processes to release new products, and speedier resolution of issues on the front line.

Core Banking Replacement

Global Banking Group

Building the Core Banking Platform



Multiyear Core Banking Transformation to replace legacy systems with a single modern platform, including building new capabilities such as Payments Engine and new Banking products.



Seven consulting has been and continue to be a key player in providing services to the \$350m program from Project Managing key releases, Program Office Management, Release and Deployment planning and management.



The Core Banking Transformation has enabled the Bank to build a centralise platform for loans and deposits products, support a new payments capability and expand in Retail, Business and Mortgage businesses.

Appendix A - EPMO

Key Objectives of a EPMO

- **Effectively govern projects inline with the Enterprise Program Management approach and coordination team policy.**
- **Identify and develop project management methodology, best practices and standards.**
- **A clearing house and management for project policies, procedures, templates and other shared documentation.**
- **A central office for operation and management of project management tools, such as enterprise-wide project management software.**
- **Maintain an accurate baseline and audit trail of approved projects, monitoring project timelines and budgets at a programme level.**
- **Monitor and report programme status by defining standard management tracking and reporting processes.**
- **Act as the point of contact about all project related activities to both internal and external stakeholders.**

Typical EPMO Services

Programme Control

Metrics generation and Programme level reporting

Balanced Scorecard & Reporting

Programme Master Schedule maintenance

Resource Management (scheduling, tracking & forecasting)

Expense tracking and SOW reconciliation

Configuration Management

Manage set-up & configuration of PMIS tool

PM Coaching / Mentoring (tools, templates & processes)

Project Health Checks

Exit Phase Gate Reviews

Programme Reviews

Post Implementation Review

Programme Management Analysts

Support generation of detailed work plans

Programme Baselines (Dollars, Dates, Deliverables)

Deliverable Tracking (QA and Sign Off)

Detailed work plan progress tracking and maintenance

Metrics analysis & performance / status reporting

Financial Tracking (Actuals, ETC, EAC & variances)

Programme Issue and Risk Management

Programme Scope Change Management

PM Coaching / Mentoring (tools, templates & processes)

Support and Administration

Logistics (PCs, Desks, Security etc)










Communications and actions tracking

PPMC Tool Administration / Configuration

Appendix B – EPMO Review

EPMO Review - Scope

- Interview of 15-20 key stakeholders to establish current capability.
- The diagram below is an example of the format of the capability report.

Core Portfolio Key Management	RAG Status	Current State		
Status Reporting		<ul style="list-style-type: none"> Multiple reports Self Assessment 	<ul style="list-style-type: none"> Misaligned project RAG status Portfolio reports differ by segment 	<ul style="list-style-type: none"> Limited analysis capability Lot of ad-hoc reporting
Compliance Monitoring (Including standards)		<ul style="list-style-type: none"> Multiple govern groups Out of date processes 	<ul style="list-style-type: none"> Variation across Divisions Roles & resp not clearly documented 	<ul style="list-style-type: none"> No impact for non-compliance No quality assurance
Project prioritisation, Strategic Intent, ROI		<ul style="list-style-type: none"> Little influence on pipeline No ability to challenge 	<ul style="list-style-type: none"> Limited or no tech assessment on ROI or impacts to capacity 	<ul style="list-style-type: none"> 20% of projects not aligned to roadmaps
Dependency, Inter-Program contention		<ul style="list-style-type: none"> No group portfolio view Focus on projects only 	<ul style="list-style-type: none"> No project inter-dependency management at a portfolio level 	
Implementation, Release Mngt, Change Mngt		<ul style="list-style-type: none"> No release schedule more than 4 weeks out 	<ul style="list-style-type: none"> No authority to challenge status 	<ul style="list-style-type: none"> No go decision late in life cycle (CAB/CRW boards)
Escalation Management		<ul style="list-style-type: none"> No portfolio escalation process 		
Capacity Management		<ul style="list-style-type: none"> No portfolio capacity management 	<ul style="list-style-type: none"> No formal process for SM to engage at early stage (idea) 	<ul style="list-style-type: none"> No portfolio level view of resource or release schedule hotspots
Risk Management		<ul style="list-style-type: none"> No portfolio risk profile 	<ul style="list-style-type: none"> Focus on risks not issues 	
Recovery		<ul style="list-style-type: none"> No project recovery function 	<ul style="list-style-type: none"> GPP team lacks experienced practitioners 	

- Presentation of background, current state, impact on current delivery, PMO structural options and recommended approach including scope, target operating model, benefits, costs and schedule for implementation.
- A communication plan will be produced which outlines the recommended approach.

Appendix C – Virtual PMO

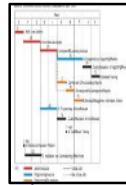
What is a Virtual PMO?

The Seven Consulting Virtual PMO is an on-site outsourced PMO providing PMBOK aligned Project Management and PMO services to a portfolio of projects and programs:

Project Management



Project Scope and Change Management



Project Time Management (including Schedule Management)



Project Cost Management (including Budget and Timesheet Management)



Project Human Resource Management (including Mobilisation and Demand Management)



Project Communications Management (including Stakeholder and Operational Communications)



Project Risk Management (including Issues, Assumptions and Dependencies Management)



Project Procurement Management (including General Administration)

Governance

Supporting Functions

Virtual PMO – One Page Overview

How It Works

- An experienced, qualified team managed by a dedicated Seven Consulting Project / PMO Manager:
 - Reporting directly to the client executive responsible for all (in scope) projects
 - Reporting indirectly to the Enterprise PMO Manager
 - Responsible for ensuring all Services Levels met (or exceeded)
- Staffed by experienced Project and PMO practitioners from Seven Consulting, mostly based at the client's site:
 - Project Managers
 - Master Scheduler(s)
 - PMO Analysts
 - PMO Co-ordinators

Key PMO Deliverables

- Project Schedule
- Project Budget, Forecast and Actuals
- Project DAIR (Dependencies, Assumptions, Issues and Risks) Register
- Project Change Register
- Project Resource Plan
- Regular status reports

PMO Services

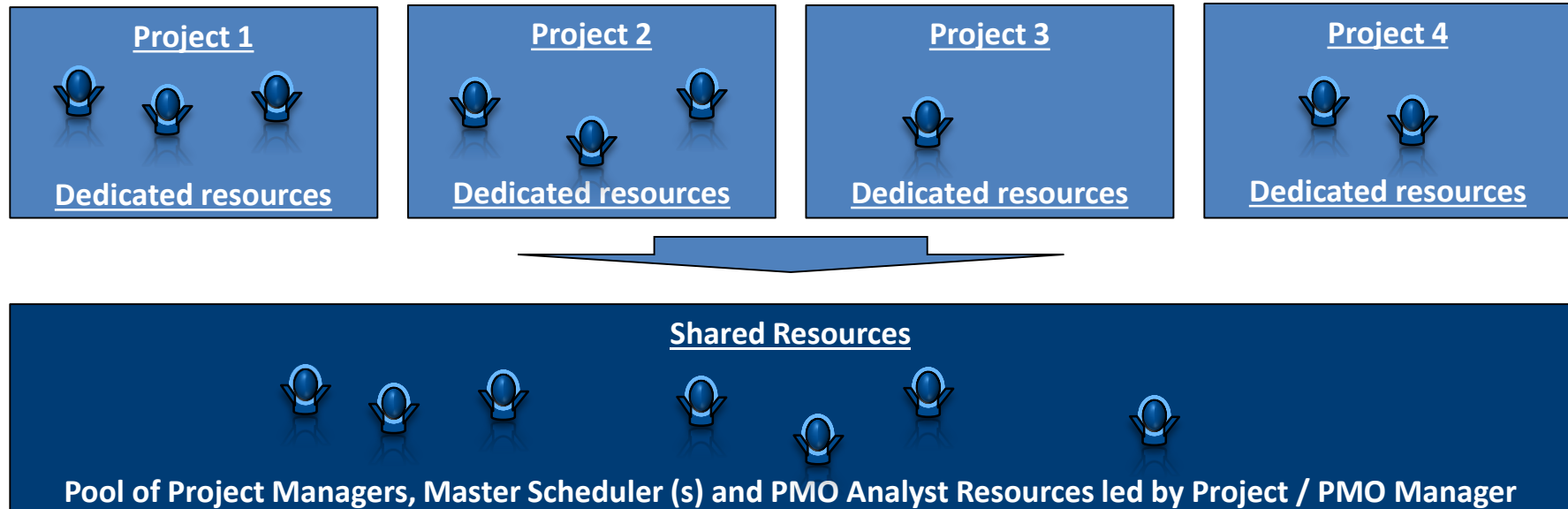
- Change Management, including managing Change Register
- Schedule Management – maintain up to date, integrated schedule
- Issue Management – Ensure up-to-date and being actioned
- Risk Management – Ensure up-to-date and being actioned
- Assumptions Management – Ensure up-to-date and actioned
- Financial Management – budgeting, actual, invoice approvals
- Resource Tracking
- Status Reporting
- Communications
- Documentation and optimisation of project management processes
- Logistics Management (facilities, security, assets, etc)
- Meeting support and logistics

Service Levels and Commercials

- Every Service has at least one associated Service Level, which together define the Service Level Agreement.
- Charges based on client specific Tiers of Project and PMO Services and Deliverables, related to project parameters such as risk, mission criticality, scale, complexity

Benefits of a Virtual PMO

- The traditional model for organisations who have implemented a project based PMO is to resource that capability per project. This generates significant wastage as resources are duplicated within each project and spare capacity from under-utilised resources is not shared.



- A Seven Consulting Project Delivery Office staffed by a pool of highly skilled specialists focussed on efficiently delivering agreed Project and PMO services to the specified service level:
 - More effective – PMO Analysts specialised in particular PMO functions support multiple projects, leveraging best practice across the projects.
 - More efficient – Resources can be shared across projects
 - Continuous Improvement – The Virtual PMO will identify areas for improvement/adaption, and can take responsibility for updating client project management documentation (if required).

Benefits of the Virtual PMO

- **Key benefits to our client of the Seven Consulting Virtual PMO include:**
- **Consistency – Common approach to PMO functions across projects improves senior management visibility, enabling better comparison of project performance.**
- **Flexibility – Project and PMO Services can be engaged, disengaged or changed instantly.**
- **Focus – Project and PMO resource recruiting, management, utilisation, training etc. is no longer a client responsibility.**
- **Measurable – Service Level Agreement based approach provides metrics to measure efficiency and effectiveness of the Virtual PMO.**
- **Shared Risk – KPIs tied to SLAs linked to Service Credits ensure “skin in the game”.**
- **Consistent Quality.**
- **Ease of implementation – utilise Seven Consulting existing best practice Project Management Life Cycle (PMLC) framework, processes and templates (as required).**
- **Best practice project management governance framework.**
- **Improved accuracy and constant visibility of project performance will allow earlier intervention and rectification of project issues to increase on time, on budget project performance.**

Virtual PMO – Service Tailoring

Seven Consulting Virtual PMO Services are tailored to suit the scale, complexity and risk profile of individual projects to ensure an effective and efficient level of support to each project:

- Tiers of Services and Deliverables will allow optimisation for each project, maximising value for money.
- At commencement, each project is put through a “triage” process to determine the level of PMO Support required. Triage parameters would include project size, complexity, business criticality, risk profile, etc
- Based on this Triage process, each project will be designated a level of PMO support (and hence cost), e.g.:
 - “Full” – All PMO Services and Deliverables
 - “Medium” – Major subset of Services and Deliverables
 - “Lite” – Minimum set of Services and Deliverables

Services	Lite	Medium	Full
Project Scope and Change Management		✓	✓
Project Time Management	✓	✓	✓
Project Cost Management	✓	✓	✓
Project Human Resource Management			✓
Project Communications Management			✓
Project Risk Management	✓	✓	✓
Project Procurement Management			✓

Deliverables	Lite	Medium	Full
Project Schedule	✓	✓	✓
Project Budget, Forecast and Actuals	✓	✓	✓
Project DAIR Register	✓	✓	✓
Project Change Register		✓	✓
Project Resource Plan			✓
Regular Status Reports	✓	✓	✓

Scope and Change Control Management

Support projects in the capture and governance of scope Change Requests

Domain: Change Control

Domain Description	Value Add
<ul style="list-style-type: none"> Project Scope Change Control is concerned with: <ul style="list-style-type: none"> Assessing the impact of potential scope changes Prioritising potential scope changes Determining a course of action for potential changes <p>Project changes are modifications to the project scope or major changes to milestones as defined in the project baseline.</p>	<ul style="list-style-type: none"> The scope change control process will ensure that changes to project scope and subsequent impacts on cost, and schedule receive proper recognition, analysis, and approval A consistent approach to scope change control ensures all projects are treated fairly Scope change requests can be aggregated at a portfolio level to gauge potential portfolio/capital budget impacts

Core Services	Deliverable/Output	SLAs
<ol style="list-style-type: none"> Document request in Scope Change Request Log Determine if request should be considered Determine and communicate disposition if request should not be considered Analyse the change and its impact if request will be considered Distribute assessment Determine and communicate final disposition Update project plans 	<ul style="list-style-type: none"> Updated change log- Within 1 working day(Should be on a weekly cycle) Advise if agreed change control process needs to be pursued (updated change log) including impact of assessment effort Analyse change and it's impact (updated change log) Communicate final disposition Update project plans 	<ul style="list-style-type: none"> Within 1 working day(Should be on a weekly cycle) Within 2 working days of change request received. Within 5 days of submission (dependent on SME availability/effort required) Within 6 working days of submission By next planned schedule updates

Key Assumptions

Change control triggers and process agreed.

Out of Scope

Initial definition of project scope, requirements capture

Time Management (including Schedule Management)

Support projects in the establishment, maintenance and reporting of their delivery schedules

Domain: Schedule Management

Domain Description

■ Supports projects in the establishment, maintenance, and reporting for their delivery schedules. Service will be provided on a regular basis, support by analysis and reporting functions related to the schedule management.

Value Add

- Ensures consistent repeatable approach to scheduling across projects
- Ensures that currency of schedules across projects is maintained with centralised visibility if this is not the case.
- The ability of external dependencies between major projects to be defined consistently with an integrated team of schedulers working together to identify changes and effects.
- Ability to maintain the schedules in a centralised repository.

Core Services

1. Schedule maintenance supporting the update, revision, and progressing of schedules and their corresponding delivery.
2. Schedule reporting for delivery progress
3. Schedule reporting for health of the control and level of detail
4. Schedule scenario analysis, and alternate delivery model analysis
5. External dependency management

Deliverable/Output

- **Updated core milestone and task dates** - Weekly progress updates for activities in the project schedule.
- **Dependency registers** - Identification of inter-dependencies between the project and other initiatives (both upstream and downstream).
- **Critical path and related activities defined** - Slippage analysis for activities, particularly for activities that have downstream dependencies.
- **Progress reports** - On delivery and deliverable completion

SLAs

- Within 1 working day(Should be on a weekly cycle)
- By next planned schedule updates
- By next planned schedule updates
- Within 1 working day(Should be on a weekly cycle)

Key Assumptions

Use of schedule management software, preferably MS Project.

Out of Scope

Enterprise project and program management software rollout

Financial Management (including Budget and Timesheet Management)

Domain: Cost Management

Support projects in their financial management

Domain Description		Value Add	
<ul style="list-style-type: none"> ■ Supports projects in establishing initial baseline and budget and subsequently tracking against said. Also provides support with regards 'enabler' processes such as PO establishment and approval, invoice payment, timesheet tracking and reconciliation between actuals and forecast. 		<ul style="list-style-type: none"> ■ Ensures consistent repeatable approach to finance across projects ■ Finance and procurement whilst important, is time consuming and can divert attention from addressing delivery issues. ■ Opportunity to produce portfolio dashboards for overall performance across projects. ■ Some time commitment required from program/project lead required for monthly review and PO/invoice approval (~2 hours per week). 	
Core Services		Deliverable/Output	SLA
<ol style="list-style-type: none"> 1. Initial establishment of baseline budget and resource profile. 2. Assist projects to track timesheet entries from team members 3. Track other project 'actuals' ongoing, tracks accruals. 4. Assist projects to generate monthly financial summaries including overall estimate of actual + forecast to complete and spend to date against budget. Identifies variances and flags, generates brief 'highlights' presentation. 5. Maintains resource forecasts on behalf of projects. 		<ul style="list-style-type: none"> ■ Baseline budget ■ Timesheet tracking ■ Accruals ■ Forecasts ■ Variances ■ Overall summary including highlights 	<ul style="list-style-type: none"> ■ Appointment of Project Manager +15 working days ■ By COB Tuesday next working week ■ Month end -5 days assuming accruals advised by Project Manager ■ Month end -1 day assuming forecasts received from stream leads ■ Month end +2 days ■ Month end +5 days
Key Assumptions		Time sheeting system available for tracking, access to system for PO entry and tracking.	
Out of Scope		Scenario modeling based on capital/release allocation. Scenario modeling across projects.	

Project Risk Management (including Issues and Assumptions)

Domain: Issues, Risks, and Assumptions

Support projects in the management and reporting of project controls

<i>Domain Description</i>	<i>Value Add</i>	
<ul style="list-style-type: none"> ■ Supports projects in the management and reporting of the project controls of Issues, Risks, and Assumptions. 	<ul style="list-style-type: none"> ■ Ensures consistent repeatable approach to project control management across projects ■ Analysis of the control profiles and risk exposure of delivery ■ Consistent rating of impact assessment across projects ■ Ensures currency of project controls and regular review thereof. ■ Ability to maintain the project controls in a centralised repository. 	
<i>Core Services</i>	<i>Deliverable/Output</i>	<i>SLA</i>
<ol style="list-style-type: none"> 1. Management of the registers and control records contained within 2. Assessment of new issues, risks, assumptions 3. Issue action and resolution reporting 4. Management of the Risks register and control records contained within 5. Risk action and mitigation reporting 6. Management of the Assumptions register and associated control records. 7. Assumption validation reporting 8. Control profile reporting for project Issues and Risks 	<ul style="list-style-type: none"> ■ Issue profile for project ■ Risk profile for project ■ Throughput analysis of action and closure of project controls ■ Identification of Issues, and actions related to Risks and Assumptions 	<ul style="list-style-type: none"> ■ Weekly updates to project controls received ■ Weekly updates to project controls. Articulation of mitigation strategies to manage risks advised by projects weekly. ■ Weekly updates to project controls. Articulation of closure of project controls advised by projects weekly. ■ Due for either completion or update advised by projects weekly.
<i>Key Assumptions</i>	Some form of share/repository for sharing controls.	
<i>Out of Scope</i>	Resolution management (should be owner of issue, risk, assumption)	

Project Communications Management (Stakeholder Management)

Domain: Communications

Support projects to establish and deliver a Communications Plan

Domain Description	Value Add	
<ul style="list-style-type: none"> ■ Supports projects in formulating and delivery a communications strategy to support their technical delivery. This is a separate activity to the business change management stream although often works closely together with it. 	<ul style="list-style-type: none"> ■ Ensures consistent repeatable approach to communications across projects ■ Can range from ‘hands off’ provision of stakeholder ‘pick lists’ through and document templates through to ‘hands on’ consultative writing of a full communications plan and assistance with preparation of other communications material. ■ Projects with identifiable business impact or requiring consultation with a number of business stakeholders will usually have a business change management stream. This function would work closely with the change management stream to coordinate stakeholder engagement 	
Core Services	Deliverable/Output	SLA
<ol style="list-style-type: none"> 1. Supports projects to first if all establish their communications plan by assisting in stakeholder identification 2. Assists in identifying best methods of engagement with stakeholder groups e.g. ‘brown bag’ sessions, newsletters, all hands meetings etc 3. Provides templates for communications plan. Potentially assists in writing the communications plan. 4. Provides templates for ongoing communications activities to ensure project covers off commonly required content in such material 	<ul style="list-style-type: none"> ■ Stakeholder identification ■ Stakeholder communications matrix ■ Full communications plan ■ General communications deck 	<ul style="list-style-type: none"> ■ Once request for identification received, ‘pick list’ sent out within 1 working day. ■ Once stakeholders and stakeholder groups identified, stakeholder communication matrix produced within 5 working days. ■ Post planning meeting with project lead, change lead and other relevant stream leads, draft 5 working days. ■ Once request received, template sent out within 1 working day
Key Assumptions	Access to key client SMEs for initial stakeholder identification.	
Out of Scope	Delivery of communications activities (should come from project)	

Project Communications Management (Operational Communications)

Domain: Project Reporting

Support projects in meeting their regular reporting requirements

Domain Description

Value Add

- Ensuring work stream reports are obtained from work stream leads on a weekly basis. Ensuring the relevant information sources are collated into the weekly project report and report issued out to relevant stakeholders. Production of other management reporting on ad hoc basis.

- Ensures a consistent reporting format across all major projects
- Will require close engagement with projects to collate reports, follow up on schedule queries, issues and risks queries as well as support for work stream and project meetings. Therefore there will be a time commitment for both PMO and Project Lead (1 day per week for work stream meetings and a day per week for PMO follow-up).

Core Services

Deliverable/Output

SLA

1. Email work stream leads weekly and remind of need to produce work stream reports. Follow up and raise exceptions where no report received. Ensure work stream reports packs ready to support work stream meetings
2. Collate schedule information, issues and risks summaries, financial summary when required, and project updates and other relevant dashboards into project report and issue to stakeholders
3. Update of Enterprise PMO system executive summary
4. Production of other executive summaries (i.e. board level summaries)

- **Work stream reports**
- **Issue of project report**
- **Enterprise PMO system update**
- **Ad hoc summaries**
- **Steering Support**

- Follow up on weekly basis, flag by 9am morning of work stream meeting no report received
- Issue weekly. Within 1 working day of Steering.
- Update within 1 working day of overall project report issue
- 1 working day of request
- Pack issued by COB before Steering Committee

Key Assumptions

Enterprise system available if enterprise input required.

Out of Scope

Actual creation of status reports should be done by stream leads/project leads

Project Human Resource Management (Demand Management)



Domain: Resource Demand Management

Support projects in the management of their resource demand and support of the requisitioning process

Domain Description		Value Add
<ul style="list-style-type: none"> ■ Supports projects in the management of their resource demand, and support of the agreed resource requisitioning process. Extends to facilitation of the agreed resource demand planning process 		<ul style="list-style-type: none"> ■ Ensures consistent approach to identification of required resources for project delivery ■ Provides a single interface point for the engagement resource managers / owners with project teams. ■ Identification of excess resource capacity across program of work. ■ Support (but not replacement) for HR functions including duration of engagement.
Core Services	Deliverable/Output	SLA
<ol style="list-style-type: none"> 1. Management of the resource allocation to projects 2. Management of the resource requisitioning process 3. Facilitation for projects in the resource demand planning and forecasting process 4. Resource demand reporting 5. Workforce reporting 	<ul style="list-style-type: none"> ■ Resource demand profile for project ■ Resource requests for project ■ Resource allocation release for project ■ Workforce reports 	<ul style="list-style-type: none"> ■ Monthly (at a minimum) update for resource demand. Collated monthly. ■ Regular updates for resource requisitions ■ Regular updates for resource allocation release ■ Notification of when resource allocation is met by vendor partners.
Key Assumptions	Central HR function present.	
Out of Scope	Resource search and selection	

Project Human Resource Management (Resource Mobilisation)

Support projects in the mobilisation and de-mobilisation of project resources

Domain: Resource Mobilisation Management

Domain Description	Value Add
<ul style="list-style-type: none"> ■ Supports projects in the mobilisation and demobilisation (along with associated logistics) for project resources. 	<ul style="list-style-type: none"> ■ Economies of scale for the logistics supporting mobilisation and demobilisation. ■ Single interface point for projects with core supporting functions across organisation. ■ Better allocation for organisation assets, and reduction of wasteful asset purchases. ■ Consistent process for mobilisation and demobilisation.

Core Services	Deliverable/Output	SLA
<ol style="list-style-type: none"> 1. Onboarding of project resources 2. Offboarding of project resources 3. Management of centralised asset registers for supporting equipment 	<ul style="list-style-type: none"> ■ Project resources mobilised ■ Project resources de-mobilised ■ Project assets recycled 	<ul style="list-style-type: none"> ■ Advance notification of mobilisation requirements (+15 working days) ■ Advance notification of de-mobilisation requirements (+10 working days) ■ Return of organisation assets for redistribution or decommissioning

Key Assumptions	Supporting functions available for HR setup, hardware and software provision, security access.
------------------------	--

Out of Scope	Resource search and selection
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Project Procurement Management (including General Administration)



Domain: Resource Mobilisation Management

Support projects in centralisation of general administration requests

Domain Description	Value Add
<ul style="list-style-type: none"> ■ Supports projects by providing a single point for the centralisation of general administrative requests out to other service areas of the company. 	<ul style="list-style-type: none"> ■ Able to aggregate requests to internal service providers and provide a single point of contact for them ■ Ensure required internal controls and processes are adhered to

Core Services	Deliverable/Output	SLA
<ol style="list-style-type: none"> 1. PC requisition 2. Software requisition 3. Property management/facilities management requests 4. Raises POs on behalf of projects and tracks through to approval. 5. With appropriate authorisation, pay invoices on behalf of projects. 6. Specific printing 7. Document management 	<ul style="list-style-type: none"> ■ Supply of laptops/PCs ■ Supply of required software ■ Supply of desks/security access ■ 'Off boarding' of above ■ PO entry, invoice payment ■ Specialist printing undertaken ■ Creation of document repositories 	<ul style="list-style-type: none"> ■ Advance notification of onboarding (+15 working days) ■ See above. ■ See above. ■ Advance notification of leaving (+10 working days). ■ 1 working day of receiving PO or invoice ■ Several days notice of printing requirement ■ Several days notice of repository requirement, assume standard structure

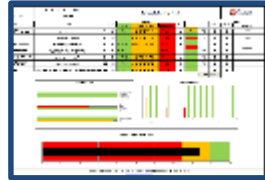
Key Assumptions	Centralised HR, Facilities and Security functions accessible.
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Out of Scope	Vendor search and selection. Initial sourcing and negotiation process.
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Appendix D – PMO Tools

Traditional Program Delivery Tools

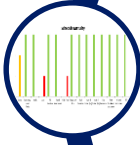
Health Check Score



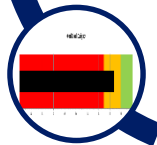
Health Check Tool

The Schedule Health Tool is designed to evaluate the quality, integrity and currency of a project schedule and suggests improvement areas.

Schedule Maturity



Overall Schedule Quality Score



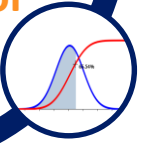
Project Confidence Level



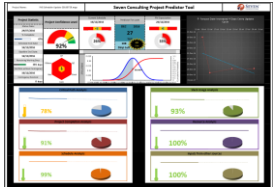
Critical Path Analysis



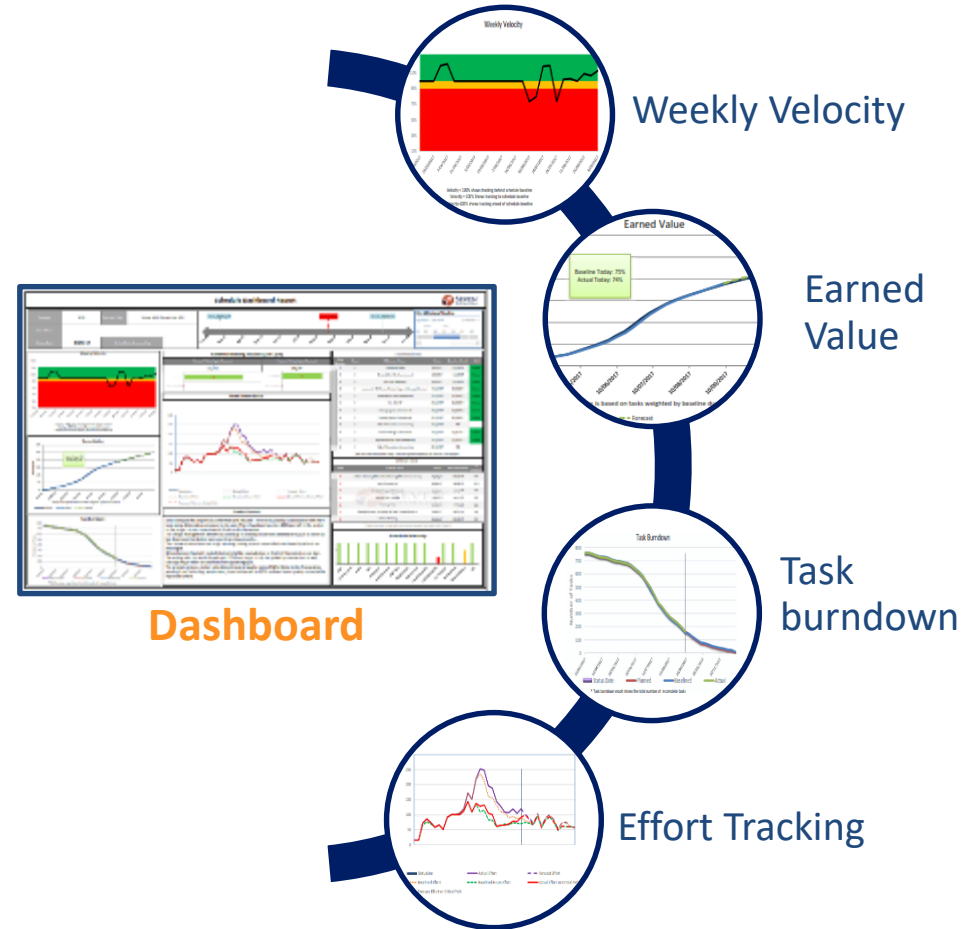
Cumulative Probability



Schedule Predictor

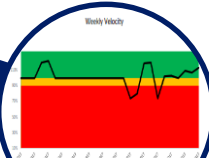


The Schedule Predictor Tool uses advanced algorithms to evaluate the precision of project forecast date and PM expectation finish date according to their actual performance. It provides a prediction trend line to suggest improvement areas.



Dashboard

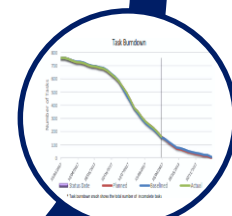
Weekly Velocity



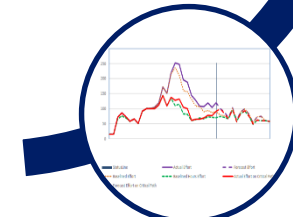
Earned Value



Task burndown



Effort Tracking



The Schedule Dashboard combines a number of reports to provide a 'Dashboard', or snapshot of agile projects progress. These include Weekly velocity, Earned Value, Task burndown and Effort Tracking.

Schedule Health / Schedule Quality Assessment; Example

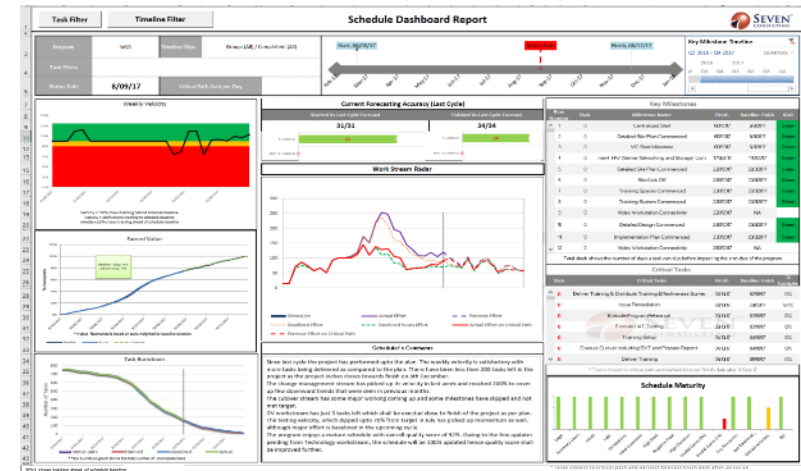
Criteria	Description	Target Type	Lower Limit	Upper Limit	Score Guide			Weight	Score (out of 3)	weight Score	Details		
					On Target	Within Tolerance	Needs Attention				Actual Number	Total Number	Activity Code
Logic	The number of activities that are missing a predecessor, a successor or both.	Minimize	5.0	10.0	Less than 5%	More Than 5% and less than 10%	More than 10%	15	3	15.0%	13	678	3;10;18;33;56;295;328;403;484;519;574;583;808
Summary Level Tasks	No dependency or resources assigned to summary level tasks	Minimize	1.0	2.0	Less than 1%	More Than 1% and less than 2%	More than 2%	5	1	1.7%	51	208	Results are more than 20
Leads	This check identifies activities that are carrying a lead (also known as a negative lag)	Minimize	5.0	10.0	Less than 5%	More Than 5% and less than 10%	More than 10%	3	1	1.0%	91	678	Results are more than 20
Lags	This check identifies activities that are carrying a lag	Minimize	5.0	10.0	Less than 5%	More Than 5% and less than 10%	More than 10%	3	1	1.0%	71	678	Results are more than 20
FS Relations	The Number of Activities without FS relation	Minimize	10.0	20.0	Less than 10%	More Than 10% and less than 20%	More than 20%	3	3	3.0%	43	678	Results are more than 20
Hard Constraint	Number of activities with hard or two-way constraints	Minimize	0.5	1.0	Less than 0.5%	More Than 0.5% and less than 1%	More than 1%	9	1	3.0%	71	678	Results are more than 20
High Float	Number of activities with total float greater than quarter of project duration.	Minimize	2.0	5.0	Less than 2%	More Than 2% and less than 5%	More than 5%	6	1	2.0%	62	678	Results are more than 20
Negative Float	Total activity that is incomplete and total float is less than zero working days	Minimize	0.0	0.0	Less than 0%		More than 0%	15	1	5.0%	127	678	Results are more than 20
High Duration	Total number of activities that have a duration longer than one months	Minimize	5.0	10.0	Less than 5%	More Than 5% and less than 10%	More than 10%	10	3	10.0%	19	678	13;104;110;116;118;134;141;156;455;463;594;596;600;610;627;636;658;824;846
Invalid Dates	All activities with planned work in the past. There should not be any invalid dates in the schedule	Minimize	0.5	1.0	Less than 0.5%	More Than 0.5% and less than 1%	More than 1%	20	3	20.0%	1	562	485
Key Resources	Number of activities that do not have resources correctly assigned (over-allocated resources)	Minimize	10.0	20.0	Less than 10%	More Than 10% and less than 20%	More than 20%	3	1	1.0%	678	678	Results are more than 20
Missed Activities	Number of activities that have slipped from their baseline dates	Minimize	10.0	20.0	Less than 10%	More Than 10% and less than 20%	More than 20%	5	1	1.7%	578	678	Results are more than 20
BEI	Baseline Execution Index (Number of Actual Finished Activity/ Numebr of Baseline Finished Activity)	Minimize	10.0	20.0	Less than 10%	More Than 10% and less than 20%	More than 20%	3	1	1.0%	49	165	Results are more than 20
								100		65.3%	Final Score		

Seven's Schedule Reporting Dashboard

- **What we offer:**
 - **Customisable dashboard which provides** rich detail on leading indicators at the program, project and work stream level
 - The dashboard is designed so it **can be used at all levels** from Executive Sponsors through to Portfolio Directors/Heads of Delivery, Program Directors, PMO Leaders, Project Managers and Workstream Leads.
- **Benefits for you:**

The Dashboard provides a snapshot through which management can determine:

 - The performance of program or its section:
 - against the baseline;
 - against the forecast;
 - Where the challenges are;
 - Where to focus attention and effort to recuperate the slipping tasks.
- The dashboard is based on detailed calculated schedule dates and shows whether the team is getting through the overall workload and critical path tasks as expected. *(Note: this is a different view of progress to a status report as it is based on detailed information captured in the schedule.)*

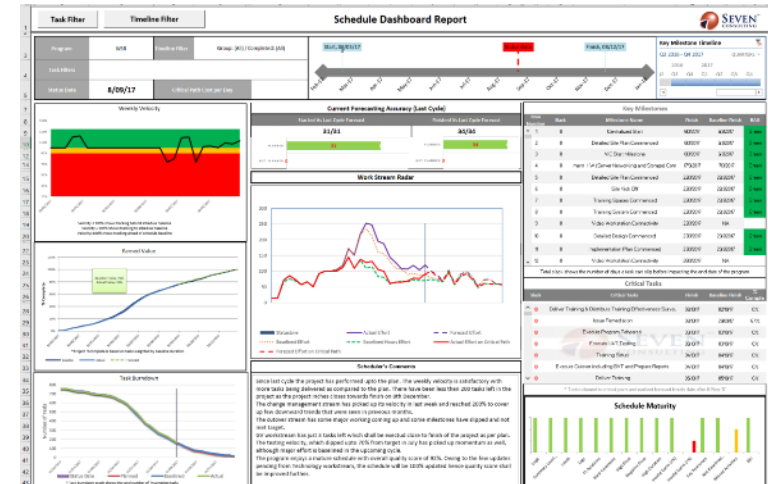


[See Appendix 1](#) – example of a reporting dashboard

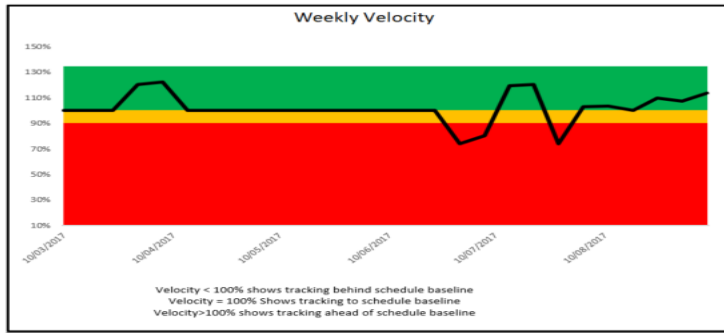
Seven's Schedule Reporting Dashboard

The dashboard provides insight into:

- The cumulative progress of the Program, Project, Release or Workstream against baselined plan.
- The velocity (speed versus planned speed by week) of a Program, Project, Release or Workstream
- The progress of task completion in a Program, Project, Workstream or Release against the overall plan and forecast.
- The most urgent critical path tasks and their progress against the baseline.
- Schedule Maturity, based on best practice standards (established by the Defence Contract Management agency, USA) which are a key indicator of the projects likelihood of success
- The amount of effort exerted and planned to be exerted by Program or Workstream.
- The status of key milestones of Project, Program or value stream.
- Summary of the Program Timeline.
- Project risks, opportunities insights through the Scheduler's Comments



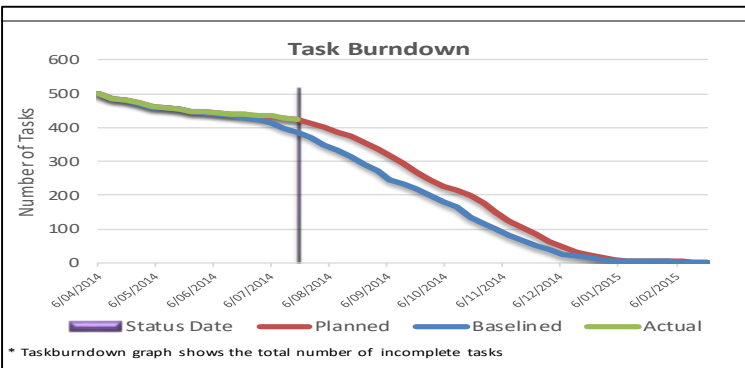
Seven's Schedule Reporting Dashboard



1. **Weekly Velocity:** The capacity to complete number tasks in a period interval is termed as velocity. This component compares planned velocity with actual velocity and shows a progress line. The progress line passing through red area indicates the velocity of project during that period has remained less than 90% (i.e The number of tasks actually completed is less than 90% of the number of tasks planned during the reporting cycle). The amber is acceptable and the green area shows actual progress is equal to or better than the planned progress during the reporting cycle

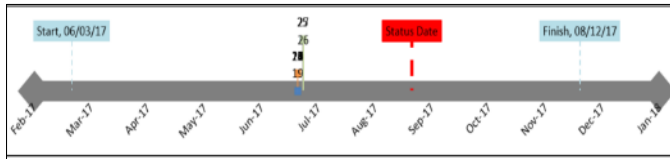


2. **Earned Value:** This component gives insight into project, program or workstream progress. The dotted green line (after status date) shows the forecast whereas the purple and blue lines show baseline and actual progress respectively. The small box just above the lines show Actual and Baseline progress percentage.

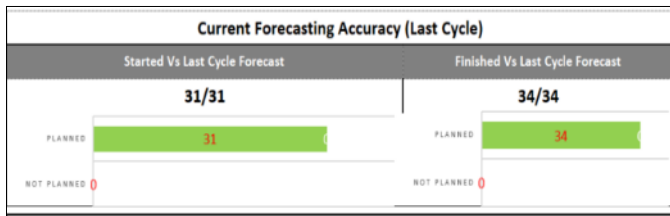


3. **Task Burndown:** This Graph shows the burn rate of activities according to baseline, forecast and actual. The ideal scenario will be actual/plan graph overlapping the baseline or appearing below/ left to the baseline progress graph. The actual / plan graph appearing above/right to the baseline progress indicates project missing its target completion

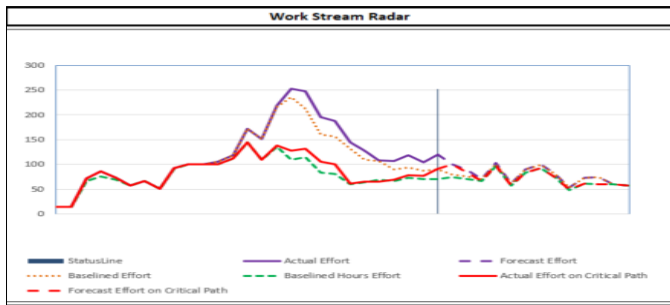
Seven's Schedule Reporting Dashboard



4. **Program Timeline:** The program timeline draws the timeline from Program start and finish and marks the status date. It also displays milestones shown in the 'Key milestones' section of the dashboard.



5. **Current Forecasting Accuracy:** This component provides the forecasting accuracy of the project. The number of tasks started versus number of tasks planned to be started and number of tasks finished versus number of tasks planned to be finished in the current reporting cycle. The report also shows any non-baselined tasks present in the schedule.



6. **Work Stream Radar:** The work stream radar compares effort along critical path and total project effort with respect to baseline, actual and forecast. The area where total project effort is coinciding with critical path effort is a high risk area. The area with wider gap between critical path effort and total Project or Program effort shows less risk areas over the period of time.

Scheduler's Comments

Since last cycle the project has performed upto the plan. The weekly velocity is satisfactory with more tasks being delivered as compared to the plan. There have been less then 200 tasks left in the project as the project inches closes towards finish on 8th December.
 The change management stream has picked up its velocity in last week and reached 200% to cover up few downward trends that were seen in previous months.
 The cutover stream has some major working coming up and some milestones have slipped and not met target.
 GV workstream has just 3 tasks left which shall be exected close to finish of the project as per plan. The testing velocity, which dipped upto 70% from target in July has picked up momentum as well, although major effort is baselined in the upcoming cycle.
 The program enjoys a mature schedule with overall quality score of 92%. Owing to the few updates pending from Technology workstream, the schedule will be 100% updated hence quality score shall be improved further.

7. **Scheduler's Comments:** This section provides the Master Scheduler's insights into schedule's risks and issues. The scheduler may raise any upcoming risks, opportunities or issues in the schedule and critical path.

Seven's Schedule Reporting Dashboard

Key Milestones					
Row Number	Slack	Milestone Name	Finish	Baseline Finish	RAG
1	0	Key Milestone: W-ER18.2 Release Registration Confirm	27/9/2017	27/9/2017	Green
2	0	Draft HLSI - MAAS	31/10/2017	31/10/2017	Green
3	0	Key Milestone: HLSI - MAAS (Ver 1.0) Signed Off	1/12/2017	17/11/2017	Red
4	0	Obtain Master Product List Sign off	10/1/2018	10/11/2017	Red
5	0	System Test Environment Available	15/1/2018	15/1/2018	Green
6	0	Key Milestone: Initial DRA complete	22/1/2018	22/1/2018	Green
7	0	AWD MLC/Processor (SIT ENV - SIT2)	25/1/2018	25/1/2018	Green
8	0	AWD MLC/Processor (UAT ENV - SIT2)	25/1/2018	25/1/2018	Green
9	0	Capsil (SIT ENV - TMCICS(MLCB))	25/1/2018	25/1/2018	Green
10	0	Capsil (UAT ENV - TMCICS(MLCB))	25/1/2018	25/1/2018	Green
11	0	Compass (SIT ENV - 65T)	25/1/2018	25/1/2018	Green
12	0	Compass (UAT ENV - 65T)	25/1/2018	25/1/2018	Green

Total slack shows the number of days a task can slip before impacting the end date of the program

8. **Key Milestones:** This section shows the list of key milestone for the Program, Project, or Workstream. The report also shows RAG (Red, Amber or Green) status based on their proximity to critical path and slippage from baseline. The green colour shows the milestone has completed on time. The amber colour shows delayed milestone on non-critical path whereas red colour shows delay in milestone on critical path

Critical Tasks					
Slack	Critical Tasks	Finish	Baseline Finish	% Complete	
0	Deliver Training & Distribute Training Effectiveness Survey	02/10/17	02/10/17	0%	
0	Issue Remediation	02/10/17	28/09/17	67%	
0	Execute Program Rehearsal	03/10/17	03/10/17	0%	
0	Execute UAT Testing	03/10/17	03/10/17	0%	
0	Training Setup	04/10/17	04/10/17	0%	
0	Execute Cutover including BVT and Prepare Reports	04/10/17	04/10/17	0%	
0	Deliver Training	05/10/17	05/10/17	0%	

* Tasks closest to critical path and earliest forecast finish date after 8-Sep-17

9. **Critical Tasks:** This section lists future critical and near critical tasks. Progress of tasks listed in this section must be closely monitored to ensure critical tasks are managed appropriately. The section is enabled with a scroll bar to browse through upcoming critical or near critical tasks.



10. **Schedule Maturity:** shows the maturity of schedule against a set criteria of best practice scheduling. (Defence Contract Management Agency, USA). The green bars show the criteria is exceeding the satisfaction threshold. The amber bars shows the criteria under acceptable limits whereas red bars shows where the schedule is not meeting the criteria

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