



# Seven Consulting's Tools



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**SEVEN CONSULTING  
OPALS**

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## 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 manage billions of dollars of transformation programs that range in size from <\$1m to >\$500m.



## PMO Services

We provide PMO establishment and management, PMO analysis and scheduling services, and tools for some of the largest organisations in Australia. This can range from scheduling services, to running the PMO for \$1.5bn programs, to ePMO management.

**All of our clients are reference sites**



## Change Management Services

We provide program change management, adding value from the start of an initiative through to realising benefits. We also support the integration of change management at an enterprise level to improve portfolio performance.



## Delivery Consulting

We provide delivery capability uplift, sponsor and project manager training, portfolio and program reviews to assist our clients improve their program delivery. We have successfully provided these services to over 50 clients.



## Delivery Tools

Seven Consulting has designed and developed world leading tools to assist our clients optimise their portfolio, design their delivery approach and provide deep weekly delivery insights. These tools are used successfully on over \$5bn of Programs annually.

**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.*

 <b>Commonwealth Bank</b> Client Since 2005	 <b>vodafone</b> Client Since 2009	 <b>Woolworths</b> <i>Australia's fresh food people</i> Client Since 2012	 <b>nab</b> Client Since 2013	 <b>MACQUARIE</b> Client Since 2014	 <b>futurefund</b> <i>Australia's Sovereign Wealth Fund</i> Client Since 2015	 <b>Colonial First State</b> Client Since 2015	 <b>agl</b> Client Since 2017
 <b>OPTUS</b> Client Since 2017	 <b>alintaenergy</b> Client Since 2018	 <b>BNP PARIBAS</b> Client Since 2018	 <b>indue</b> Client Since 2018	 <b>ST VINCENT'S HEALTH AUSTRALIA</b> <small>UNDER THE STEWARDSHIP OF NABU ANDENHEAD INVESTMENTS</small> Client Since 2018	 <b>ASX</b> <small>AUSTRALIAN SECURITIES EXCHANGE</small> Client Since 2019	 <b>Healthscope</b> Client Since 2019	 <b>CITY OF MELBOURNE</b> Client Since 2019
 <b>THE UNIVERSITY OF SYDNEY</b> Client Since 2019	 <b>AUSTRALIAN INSTITUTE of COMPANY DIRECTORS</b> Client Since 2020	 <b>InvoCare</b> <small>Innovation Vocation Care</small> Client Since 2020	 <b>EUROPACIFIC PARTNERS AUSTRALIA</b> Client Since 2021	 <b>CSR</b> Client Since 2021	 <b>MELBOURNE GIRLS GRAMMAR</b> <small>AN ANGLICAN SCHOOL</small> Client Since 2021	 <b>NSW GOVERNMENT</b> Client Since 2021	 <b>dexus</b> Client Since 2022
 <b>Equity Trustees</b> Client Since 2022	 <b>SUPER FUTURE</b> Client Since 2022	 <b>iress</b> Client Since 2022	 <b>AEMO</b> <small>AUSTRALIAN ENERGY MARKET OPERATOR</small> Client Since 2023	 <b>COINVEST</b> <small>LONG SERVICE LEAVE</small> Client Since 2023	 <b>vic roads</b> Client Since 2022	 <b>Greater Bank</b> Client Since 2023	



# Our clients and team are our top priority

## Client Satisfaction Survey Results

Year	Satisfaction rating	Survey questions
Jan-Jun 2023	99.31%	6,206
2022	99.20%	13,191
2021	99.15%	15,932
2020	98.87%	14,455
2019	99.08%	14,949
2018	98.65%	15,450
2017	99.08%	9,691

100% of our clients are reference sites

## Team Satisfaction Survey Results

Survey Date	Satisfaction rating
Jun'23	97.66%
Dec'22	97.82%
Jun'22	98.20%
Dec'21	97.92%
Jun'21	98.40%
Dec'20	97.90%



"The team from Seven has integrated effectively with IVC and shows they understand the business."



"Seven is one of the most prestigious consultancies in Australia and most of the Seven Consultants I have come across at my current and previous organisation prove that."



"Strong program delivery capability with the flexibility to scale up and down quickly to meet program and business needs. Look to continue to bring the best of the Seven ecosystem to clients to demonstrate the value-add."



"Good people and a focus on support from the central organisation when required."



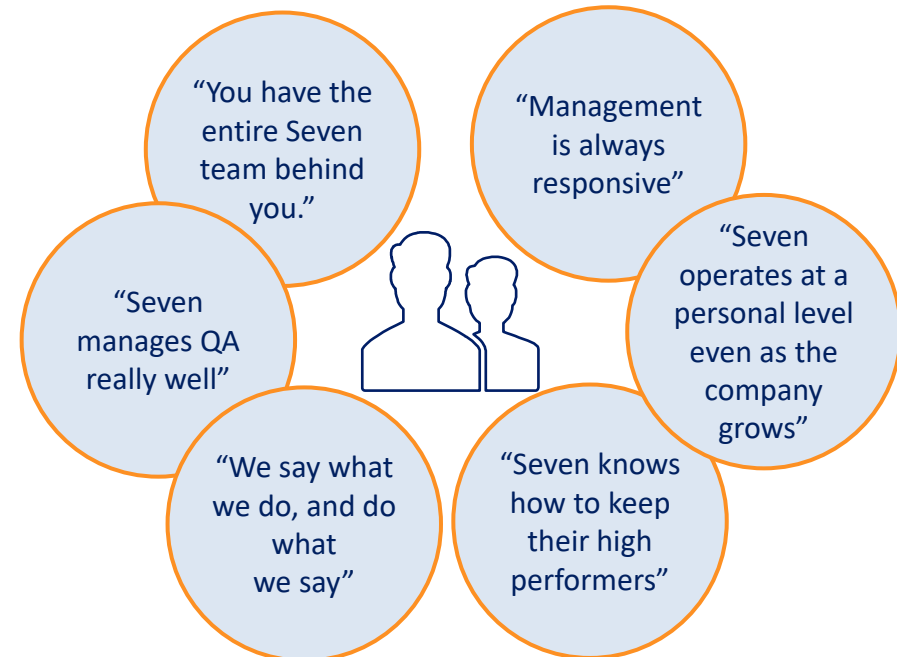
alintaenergy

"Very happy with the level of organisation and governance the Seven project/program managers bring to our more complex initiatives."



Commonwealth Bank

"Every Seven consulting person I have ever worked with has been very good at what they do."

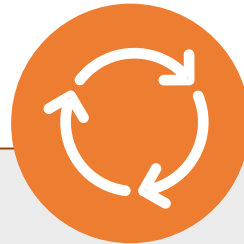


# How do we get to 98+% customer satisfaction?



## People

- 100% permanent workforce, tested extensively through a robust recruitment process.
- High employee engagement.
- Hands on owners that have delivered major programs.
- Training allowances and internal learning sessions.
- Comprehensive mentoring.
- 95% SAFe® qualified and internal trainers.



## Process

- Regular structured quality assurance of all assignments.
- Weekly review of all assignments' status.
- Industry leading Customer Satisfaction and NPS management.
- Bench support available at no cost to client.
- Holidays and illness cover for clients.



## Tools

- Dedicated project tools team.
- Program Delivery approach designed with Pathfinder.
- Delivery approach risks defined with Pathfinder.
- Schedule integrity measured with Healthcheck tool.
- Project reporting with dashboards and scorecards.
- Portfolio optimisation tool.

**All our clients are reference sites.**

# 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 strong emphasis on outcomes focuses the team and grows confidence. With a confident attitude, expert personnel and effective teams we always deliver to our client's high expectations.

# Seven Consulting's Tools

## Seven Consulting's Project Pathfinder Methodology Predictor



**UPDATE RECOMMENDATIONS NOW**

Seven Consulting recommends that your project should adopt:

**TRADITIONAL PROJ MGMT**

with the following delivery components produced:

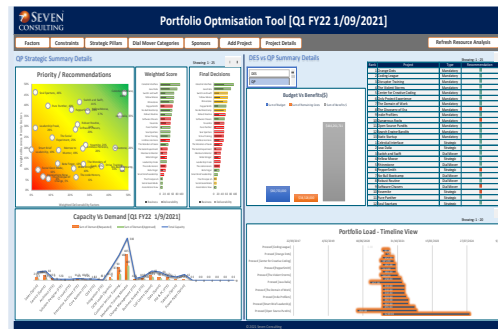
Delivery Phase	Delivery Components	Recommendation
1. Initiate	Product Vision	Recommended
	Business Case	Recommended
	Project Charter	Recommended
2. Plan	Project Plan and Stakeholder Contract Sheet	Recommended
	Project Management Plan	Recommended
	Project Scope	Recommended
	Project Risk Assessment	Recommended
	Work and Resource Estimate (WBS Matrix)	Recommended
3. Do	Project Deliverable Register	Recommended
	Control and Vendor Performance Management Plan	Recommended
	Integrated Project Schedule	Recommended
	Financial Management Plan	Recommended
	Implementation Readiness Report	Recommended
4. Close	Release Plan	Recommended
	Post Implementation Report / Retrospective	Recommended
	Project Closure Report	Recommended

We recommend applying some or all of the following best practice operating principles:

Best Practice Operating Principle	Recommendation
Use Strong Implementation	Recommended
Use Implementation	Recommended
Use Weak Implementation	Recommended

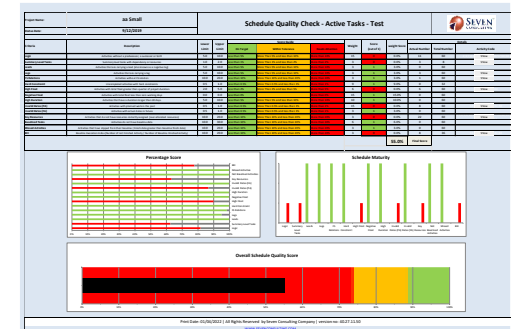
The Seven Consulting's Project Pathfinder provides guidance on how to tailor your program or project. It provides suggestions on methodology to apply, operating practices to adopt and artefacts to prepare to deliver your program or project.

## Portfolio Optimisation Tool Portfolio Planning



The Portfolio Optimisation Tool helps clients manage and prioritise their project portfolios based on a set of business priorities and deliverability constraints.

## Schedule Health Schedule Quality



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



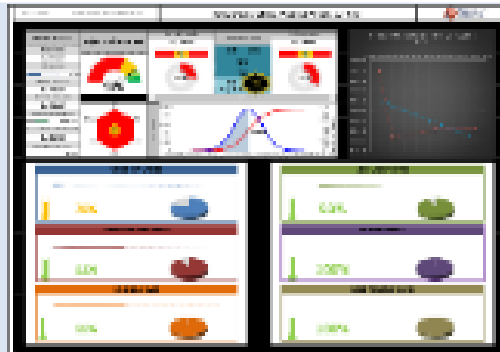
# Seven Consulting's Tools

## Schedule Dashboard Schedule Data Snapshot



The Schedule Dashboard combines a number of reports to provide a 'Dashboard', or snapshot of project progress. These include task burndown, earned value, weekly velocity, critical path management and forecast accuracy.

## Schedule Predictor Project End Date 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.

## Risk and Issue Risk & Issue Dashboard

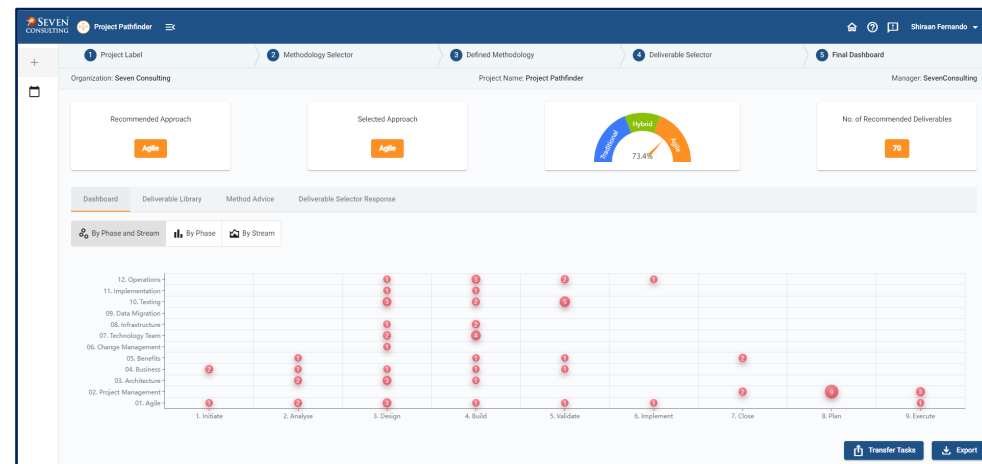
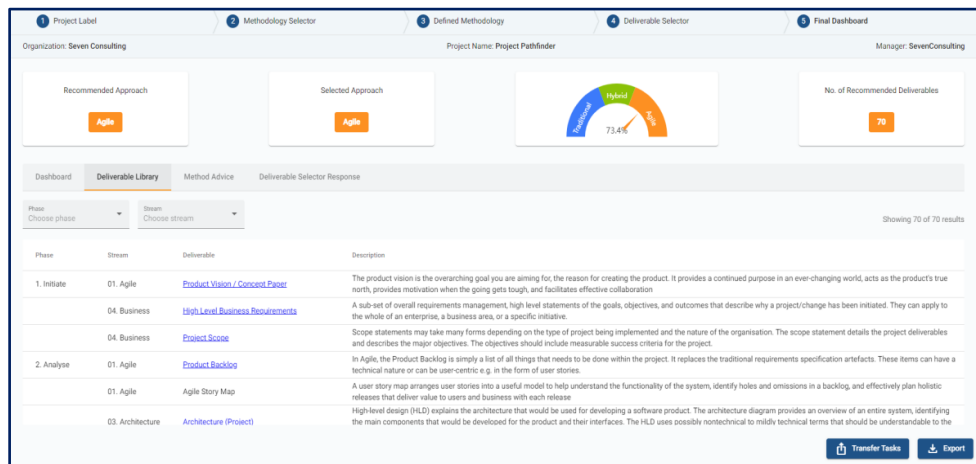


The Risk and Issue Dashboard analyses the project risk and issue registers to provide a view of key metrics that include aging, cost, quantities by project phase and severity.



# Seven Consulting's Project Pathfinder

Seven Consulting's Project Pathfinder provides guidance on how to tailor your program or project. It provides suggestions on methodology to apply, operating practices to adopt and artefacts to prepare to deliver your program or project.



- Over the last three years we have developed a tool that helps us, within 30 minutes, to create the following for any project:
  - Agree the optimized project delivery approach, Agile, Traditional (waterfall) or Blended.
  - Where the recommended approach is a blended approach, detail the customised blend.
  - Understand the residual risks and mitigations for that approach.
  - Specify the deliverables required for delivery many of which are agnostic to the Agile or Traditional approach.
  - Detail the deliverables by phase and stream.
  - Provide templates for each of the deliverables.
  - Produce a detailed delivery approach, including dependencies, mapped to a schedule.

- In 2002, Seven Consulting undertook 0 Agile projects.
- By 2010, that number had increased to 10% to 20% of our portfolio.
- Now over 60% of our projects are Agile-based.
- This aligns with the market growth of Agile adoption in Australia IT projects.
- Through these engagements, Seven Consulting has found strengths in both methods.
- We manage about \$1bn of Agile program annually and have delivered some of the largest and most successful Agile programs in Australia.
- Over 3/4 of our team is scaled agile (SAFe) qualified.
- We have two qualified SAFe trainers internally.
- However we still believe that not all programs should be delivered using Agile methodology.
- This tool helps ascertain quickly the correct delivery approach on the spectrum of Traditional to Agile.
- Use the best tool for the job!

There is no single best way to deliver a program.

From our experience of delivering billions of dollars of programs each year for some of Australia's largest organisations, we believe that different approaches are required to deliver different projects.

- This is for two sets of reasons, firstly the projects themselves are all different. Compliance and innovation projects have different characteristics.
- Secondly, organisations (technically, capability-wise and culturally) are also different.

We believe that these two sets of characteristics influence how the programs should be delivered.



# What does work?

- Assessing the organizational and project characteristics to work out the best way to deliver is the work of skilled and experienced Program Managers.
- While we don't believe in one approach, we do have a bias towards agile where sensible.
- We have spent two years codifying our collective 1000's of years of experience to allow this analysis to be done within 30 minutes.
- In addition, this Project Pathfinder tool will provide an overview of the delivery streams, phases and dependencies.
- Finally, the tool links the deliverables to templates and supporting documents, as well as creating a starting schedule based on the delivery approach.
- This tool is of best value for each of the following to assess or build delivery approach per project.
  - Portfolio Managers
  - ePMO or ITPMO Managers
  - Risk and Assurance Stakeholders and Program Reviewers
  - Project Managers stepping into larger or different roles
- We use this tool across our whole technology change portfolio with over 25 client organisations.



# **Seven Consulting's Project Pathfinder**

**4 Examples of our 28 Agile vs Traditional  
Project and Organisational Characteristics**

## Agile





- Speed, speed, speed.
- What does this work best for?
  - New products.
  - New campaigns.
  - Market testing.
  - Non-core Systems.




## Traditional



- Quality, quality, quality.
- What does this work best for?
  - Looking after people's money, medical applications, payroll etc.
  - Implementing core systems.
  - Implementing systems that impact on people's safety.
  - Best where once you release you can't rollback.

# Importance of speed to market versus quality

 **Project Pathfinder** 

1 Project Label

2 Methodology Selector

3 Defined Methodology

4 Deliverable Selector

5 Final Dashboard

Organization: Seven ConsultingProject Name: Project PathfinderManager: SevenConsulting

8 / 30

### Q8 Speed to market or speed to value are critical

☐ Strongly Agree

☒ Agree

☐ Neutral

☐ Disagree

☐ Strongly Disagree

Category: Project Benefits

**Guidance:**  
Agile methods are well suited to development of new products or services and market testing new ideas, where speed to market may be critical to the success of the initiative. Direct collaboration with customers and end users combined with short sprints results in greater speed and alignment of delivered features to user needs, albeit in feature increments. Traditional methods may be better suited where timelines are not as critical and where a significant volume of features is required before the solution is able to be used.

Restart

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## Agile



- Can deliver partial business benefits quicker.
- Get feedback from customers quickly.
- Refine and improve outputs for later cycles.
- How a child learns to walk.



## Traditional






- Best suited to majority of functionality being released in one go; e.g. a payroll program, GST introduction, currency change.



# Ability to deliver in short cycles.

 Project Pathfinder 



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## Agile





- A product owner is essential to work with the team and be available to provide quick decisions.
- On large programs, you may need multiple product owners covering different areas with one overall decision maker.
- On small projects, a part time product owner that is available daily would likely suffice.




## Traditional



- Reviews can be done in larger blocks although the time this takes clearly creates time delays versus agile.
- Can suffer from management by committee.
- There may be some advantages in seeing the end-to-end requirements, design etc.

# A knowledgeable Product Owner is appropriately assigned to the project

 Project Pathfinder 

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5 Final Dashboard

Organization: Seven ConsultingProject Name: Project PathfinderManager: SevenConsulting

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Q16 A knowledgeable and empowered Product Owner (Member of agile team responsible for defining stories and prioritizing the team backlogs) exists and could be assigned

☐ Strongly Agree

☐ Agree

☐ Neutral

☐ Disagree

☐ Strongly Disagree

Category: Flow of Knowledge

**Guidance:**

It is essential to the success of agile methods that an appropriate Product Owner be assigned to the project. The Product Owner must be knowledgeable in the project vision and product domain and be empowered to take decisions on prioritisation and acceptance of features. Traditional methods generally use group forums for deliverable review and approval and steering committees for decision making. These mechanisms are inadequate to support the demands of agile for rapid decision making and resolution of blockers.

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# Are the tools (environments, processes and data) for continuous development, testing and deployment in place?

## Agile





- Hard to move to continuous development, testing and release if the supporting elements are not in place for this.
- Many companies need time to put these in place before they can run true agile programs.
- The need for proper environment and tooling is especially true at scale and for non digital and highly integrated systems.




## Traditional



- Simpler for traditional projects as they have more time in parallel with requirements, design and build, to put these items in place where they don't exist.
- Fewer and less complex tooling generally required for traditional projects.

# Are the tools (environments, processes and data) for continuous development, testing and deployment in place?

 Project Pathfinder 



1 Project Label

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3 Defined Methodology

4 Deliverable Selector

5 Final Dashboard

Organization: Seven ConsultingProject Name: Project PathfinderManager: SevenConsulting

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### Q25 The development tools necessary for continuous software integration are in place

☐ Strongly Agree

☐ Agree

☐ Neutral

☐ Disagree

☐ Strongly Disagree

Category: Presence of Enablers

Guidance:


Agile methods utilise short duration sprints to deliver working outputs (software) for implementation or feedback. Productivity is paramount and is best enabled using a continuous integration approach. This approach requires specific tools and development practices which must be fully available early in the project. Traditional methods can also benefit from continuous integration techniques, however, there is generally time available whilst requirements and design phases are underway to establish the required tools and practices.




Restart

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# Project Pathfinder - Selected Approach

 Project Pathfinder



1 Project Label

2 Methodology Selector

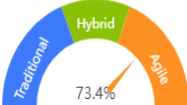
3 Defined Methodology

4 Deliverable Selector

5 Final Dashboard

Organization: Seven ConsultingProject Name: Project PathfinderManager: SevenConsulting

Recommended Approach



Agile Readiness Score: 78.1%

Agile Suitability Score: 69.2%

Risks to go Agile

Risks to go Traditional

Risks to go Hybrid

3 item(s)


Question	Response	Advice
Project viability or outcomes are uncertain	Strongly Agree	Identify sub-sets of functionalities that would benefit from early feedback from the business and/or the customers. These sub-sets will be parts of the solution that are either the key or highest risk that need to be handled earliest.
The risk of breaking existing working system or business process functionality is low	Strongly Disagree	Agile methods do not necessarily require that feature increments are implemented to production as they are developed. It is possible to use sprints to develop features which are then "batched up" to create a deployable release. In this context, an appropriate Product Owner and access to users/customers remains important.
Project delivery is impacted by other programs of work operating in the same space	Agree	Consider use of Scrum of Scrums approach to cross-team communications. Project team can structure planning & iterations to support dependency development. Conduct interface design as required (in Business Case, Iteration 0 or later)




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Start Deliverable Selector

# Project Pathfinder - Selected Approach

 **Project Pathfinder**

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1 Project Label

2 Methodology Selector

3 Defined Methodology

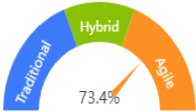
4 Deliverable Selector

5 Final Dashboard

Organization: Seven ConsultingProject Name: Project PathfinderManager: SevenConsulting

Recommended Approach

Agile



Agile Readiness Score: 78.1%

Agile Suitability Score: 69.2%

Risks to go Agile

Risks to go Traditional

Risks to go Hybrid

25 item(s)



Question	Response	Advice
The scope of the project is able to be changed once it has begun	Strongly Agree	Traditional planning tends to prefer stable scope. If scope materially varies this triggers assessments and replanning which adds overhead. This overhead could cause a reluctance to replan which could cause missed opportunities to deliver additional value as opportunities arise
The requirements for the project are well known or not likely to change	Strongly Disagree	Traditionally planned projects are best set to deliver a fixed scope and there is little opportunity to expand and include "nice to have" requirements without increasing cost or time.
There are more requirements than can or should be delivered (nice-to-have requirements)	Strongly Agree	Traditionally planned projects set to deliver a set scope and there is little opportunity to expand and include "nice to have" requirements without increasing cost or time
The project is critical to business operations	Strongly Disagree	
Scope flexibility is required to adapt to changing market conditions	Strongly Agree	The more stable the context the more appropriate a traditional approach becomes. Changed conditions in a traditional project usually trigger re-planning and re-work, though this can be partially mitigated by adopting a rolling wave approach
The effort required to complete the project can be easily estimated	Strongly Disagree	A small scale proof of concept or pilot project can be used to validate assumptions and increase accuracy of estimates but this can increase the overall timelines
Speed to market or speed to value are critical	Strongly Agree	Traditional approaches prioritise complete solutions over speed to delivery so may not suit where time is a driving factor or market conditions require significant changes to scope and approach. Consider breaking into releases.
This project only requires changes to one application or platform?	Agree	



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Start Deliverable Selector

# Project Pathfinder - Selected Approach

 Project Pathfinder 

+



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5 Final Dashboard

Organization: Seven ConsultingProject Name: Project PathfinderManager: SevenConsulting

Recommended Approach

Agile



Agile Readiness Score: 78.1%

Agile Suitability Score: 69.2%

Risks to go Agile

Risks to go Traditional

Risks to go Hybrid

13 item(s)

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Start Deliverable Selector




Not every delivery decision is resolved by working out whether we should deliver via an agile, traditional or blended approach.

There is a second series of questions to be considered, such as:

- Do we need to do a parallel run?
- Do we need to test operability of the new system?
- Do we need to do performance, DR/BCP, or Security testing?
- Do we need to perform a dress rehearsal?
- Do we need to do a pilot?

# Project Pathfinder - Agile / Traditional agnostic question examples

 Project Pathfinder 

1 Project Label

2 Methodology Selector

3 Defined Methodology

4 Deliverable Selector

5 Final Dashboard

Organization: Seven ConsultingProject Name: Project PathfinderManager: SevenConsulting

Project Name  
Project Pathfinder

Project Manager  
SevenConsulting

Recommended Approach  
Agile

Selected Approach  
Agile

Architecture

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01. Is the new system critical to business operations within 24 hours of an outage?

NO ☒ YES

02. Is Disaster Recovery and Business Continuity Plan critical for new /changed systems?

NO ☐ YES

03. Is the project impacting a mission critical application environment?

NO ☒ YES

04. Is there high impact to operations?

NO ☒ YES

05. Is a proof of concept an option?

NO ☒ YES

└ 05.a Are there adequate and appropriate resources to support a proof of concept?

NO ☐ YES

└ 05.b Will the time line allow for running a proof of concept?

NO ☒ YES

└ 05.c Is there sufficient budget to support running a proof of concept?

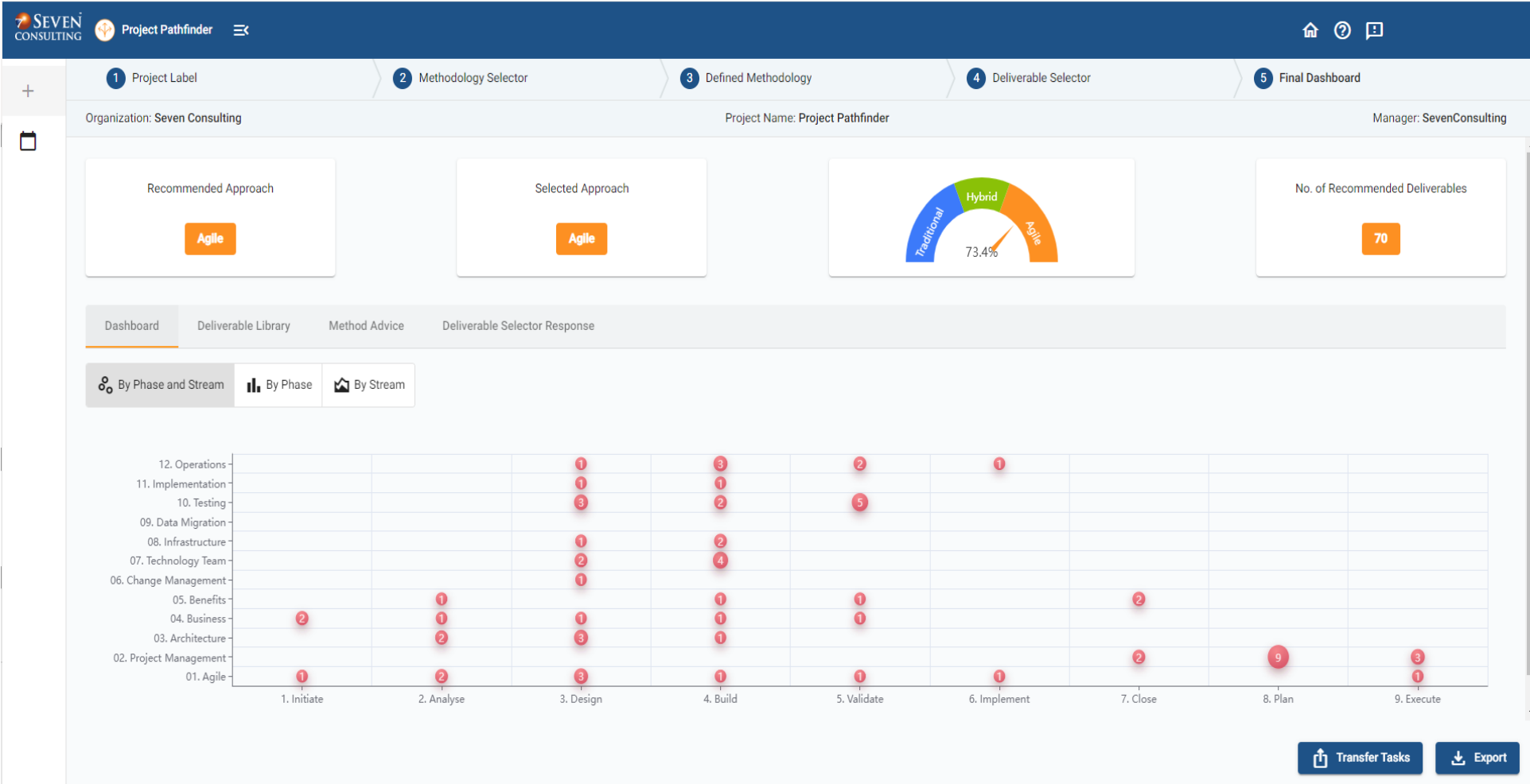
NO ☐ YES

RestartRestart Current Step

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# Project Pathfinder - Example Output



No. of Recommended Deliverables

70

Dashboard

Deliverable Library

Method Advice

Deliverable Selector Response

By Phase and Stream

By Phase

By Stream

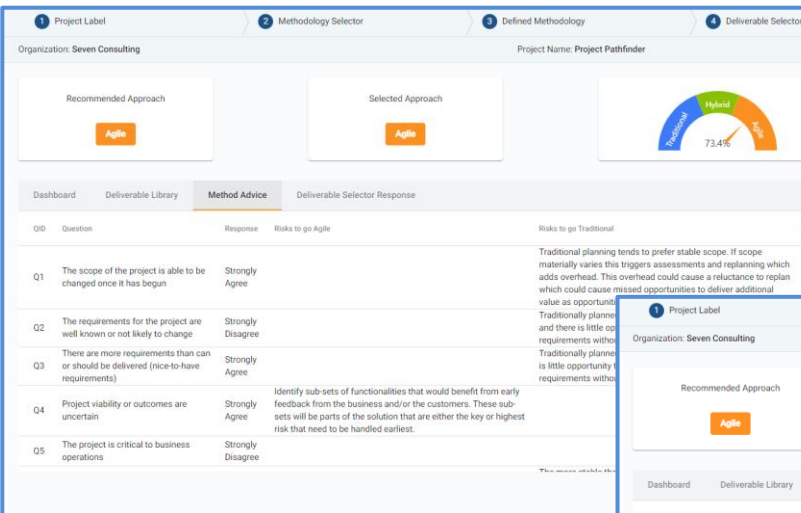
Transfer Tasks

Export

# Project Pathfinder Example Output

## Component Library

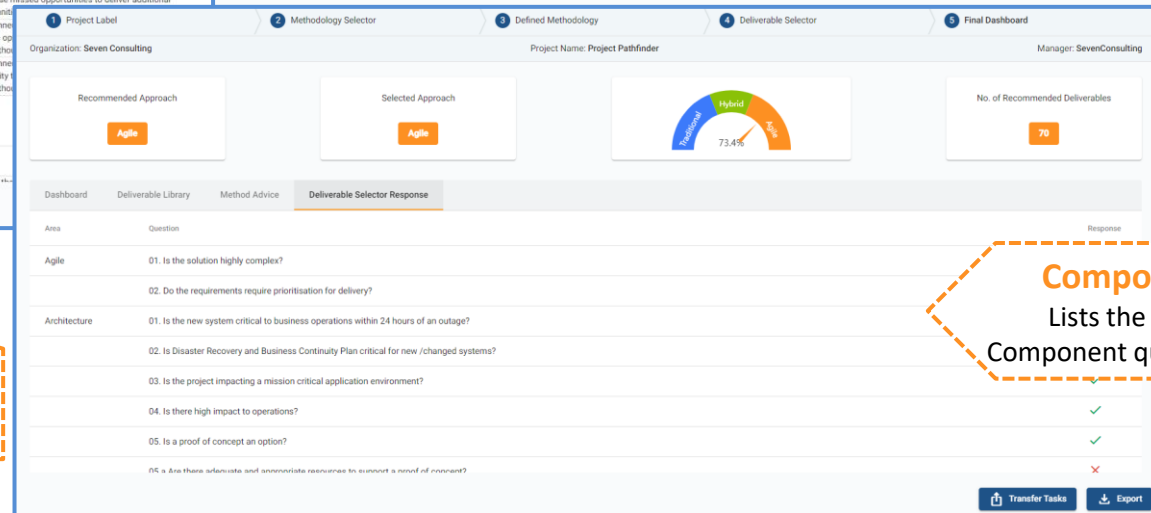
Lists suggested deliverables and activities by phase and stream



The screenshot shows the 'Method Advice' tab of the Project Pathfinder interface. It displays a table with five rows of questions (Q1-Q5) related to project scope, requirements, and business operations. Each row includes a 'Question', a 'Response' (e.g., 'Strongly Agree', 'Strongly Disagree'), and a 'Risks to go Agile' section. The 'Risks to go Agile' section provides detailed advice based on the response, such as 'Traditional planning tends to prefer stable scope' for Q1 or 'Identify sub-sets of functionalities that would benefit from early feedback' for Q4.

## Methodology Advice

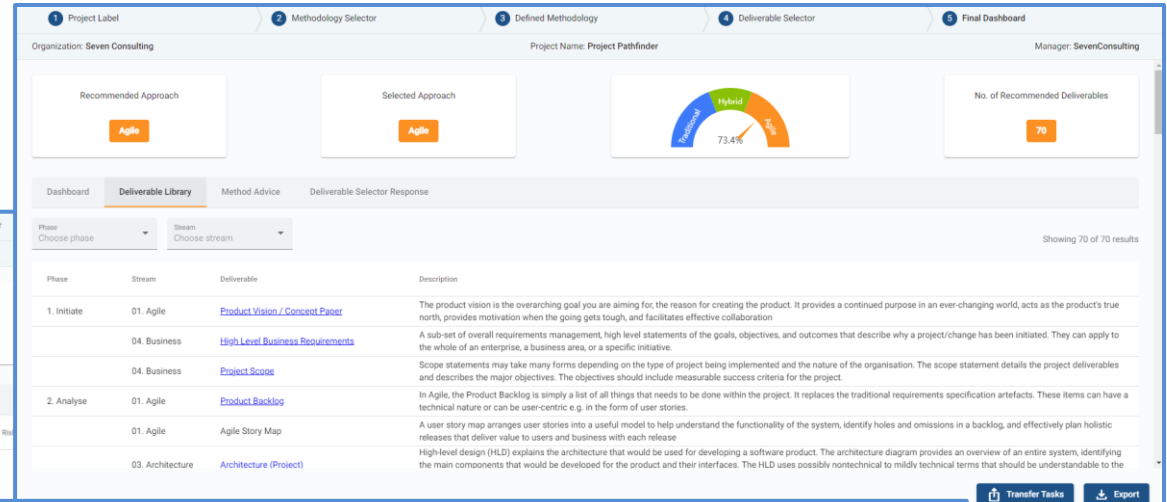
Lists the responses to the Methodology questions and displays advice as appropriate



The screenshot shows the 'Deliverable Selector Response' tab of the Project Pathfinder interface. It displays a table with five rows of questions (Q1-Q5) related to project complexity, requirements, and business operations. Each row includes a 'Question', a 'Response' (e.g., 'Strongly Agree', 'Strongly Disagree'), and a 'Risks to go Agile' section. The 'Risks to go Agile' section provides detailed advice based on the response, such as 'Traditional planning tends to prefer stable scope' for Q1 or 'Identify sub-sets of functionalities that would benefit from early feedback' for Q4.

## Component Selector

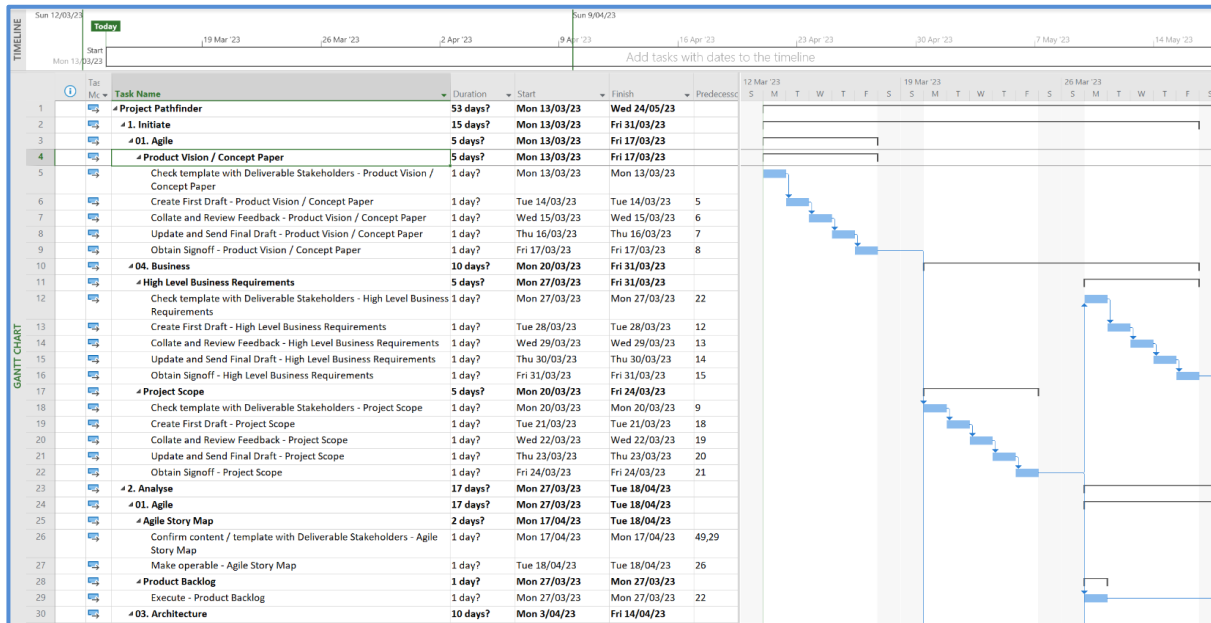
Lists the responses to the Component questions for reference



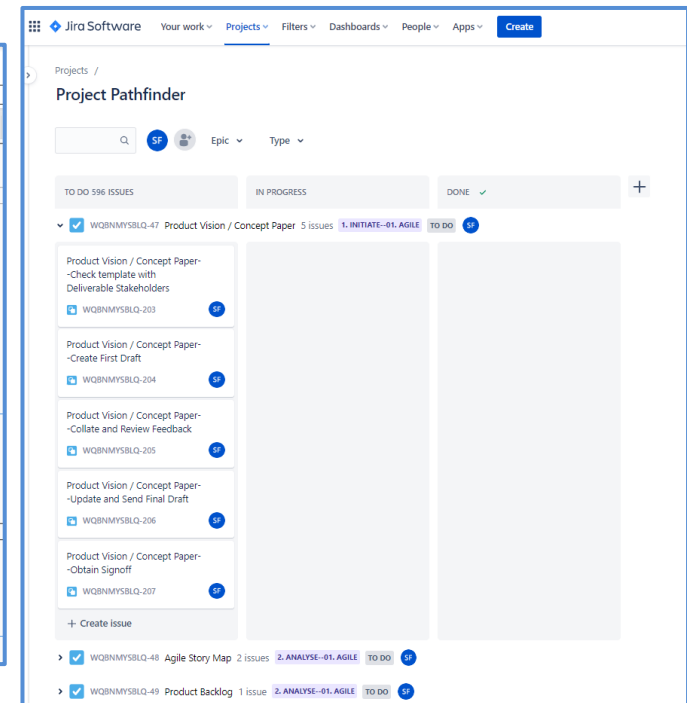
The screenshot shows the 'Deliverable Library' tab of the Project Pathfinder interface. It displays a table with five rows of questions (Q1-Q5) related to project scope, requirements, and business operations. Each row includes a 'Question', a 'Response' (e.g., 'Strongly Agree', 'Strongly Disagree'), and a 'Risks to go Agile' section. The 'Risks to go Agile' section provides detailed advice based on the response, such as 'Traditional planning tends to prefer stable scope' for Q1 or 'Identify sub-sets of functionalities that would benefit from early feedback' for Q4.

# Tool Outputs within 30 minutes

1. Recommended delivery approach for your program.
2. The risks with that approach and suggested mitigants.
3. Deliverables by phase and workstream.
4. Automatically created schedule / tasks including dependencies in either MS project or JIRA.

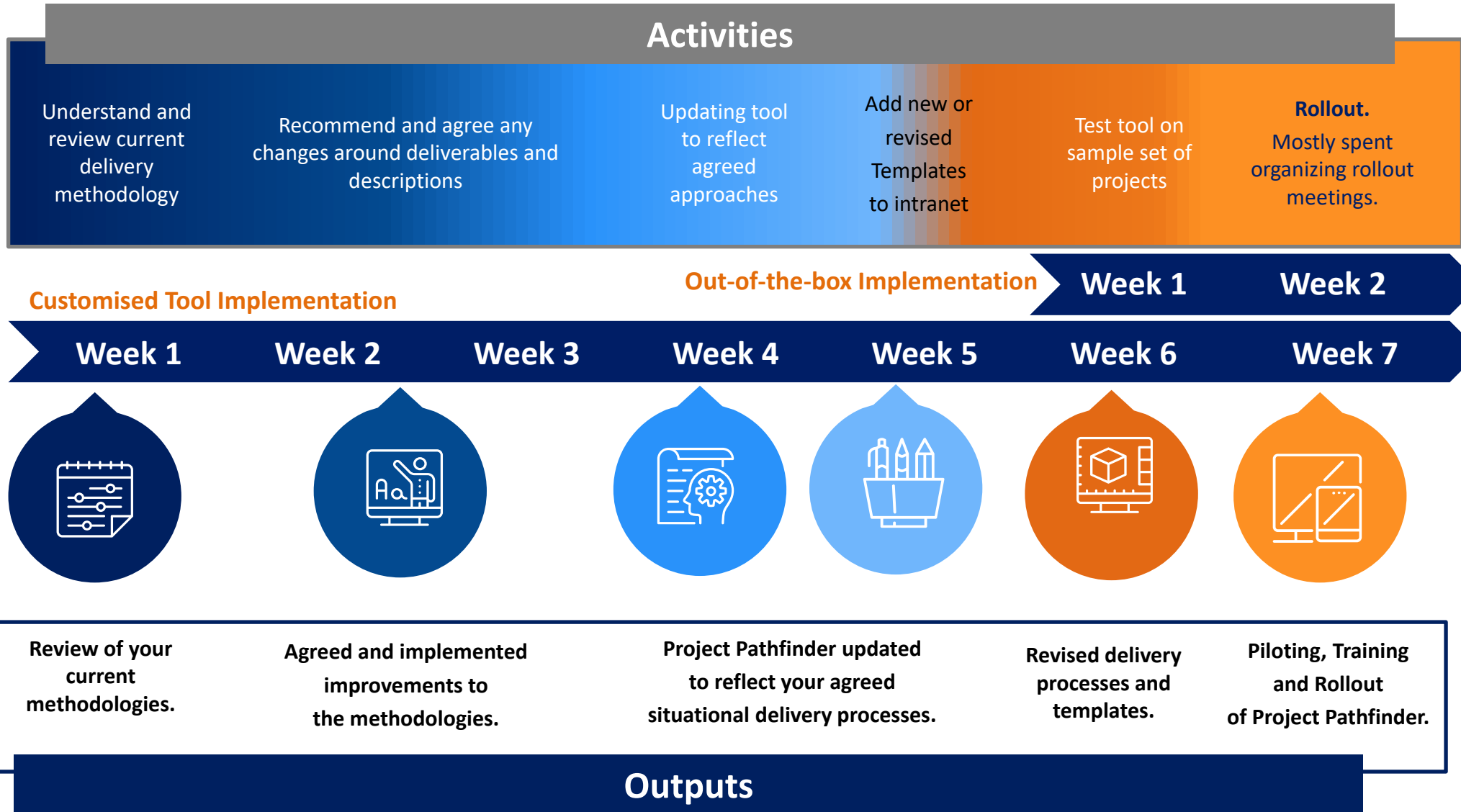


MS Project Tasks , Schedule & Dependencies



JIRA Epics with Sub-task

# Tool implementation steps and median durations

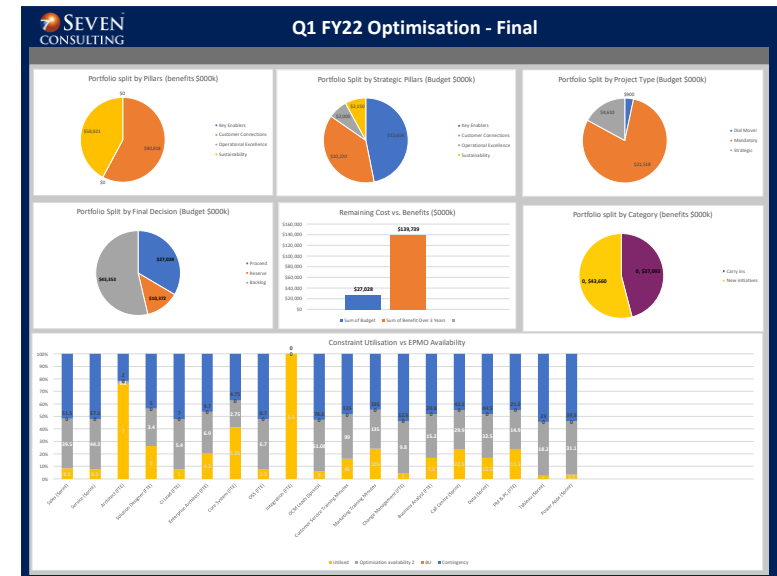
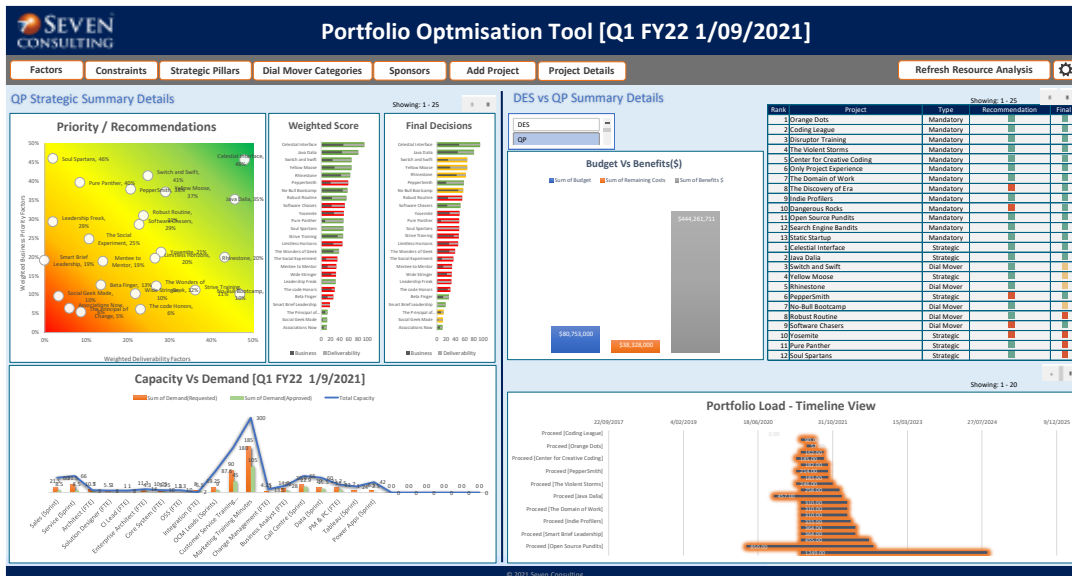


1. Using a consistent approach to have your project delivery customised and optimised based on its and your organisation's characteristics within your portfolio.
2. Increased ability to define delivery approach far more quickly.
3. Reduced level of project management oversights or omissions.
4. Leading to better project outcomes.



# Portfolio Optimisation Tool

The Portfolio Optimisation Tool helps clients manage and prioritise their project portfolios based on a set of business priorities and deliverability constraints.

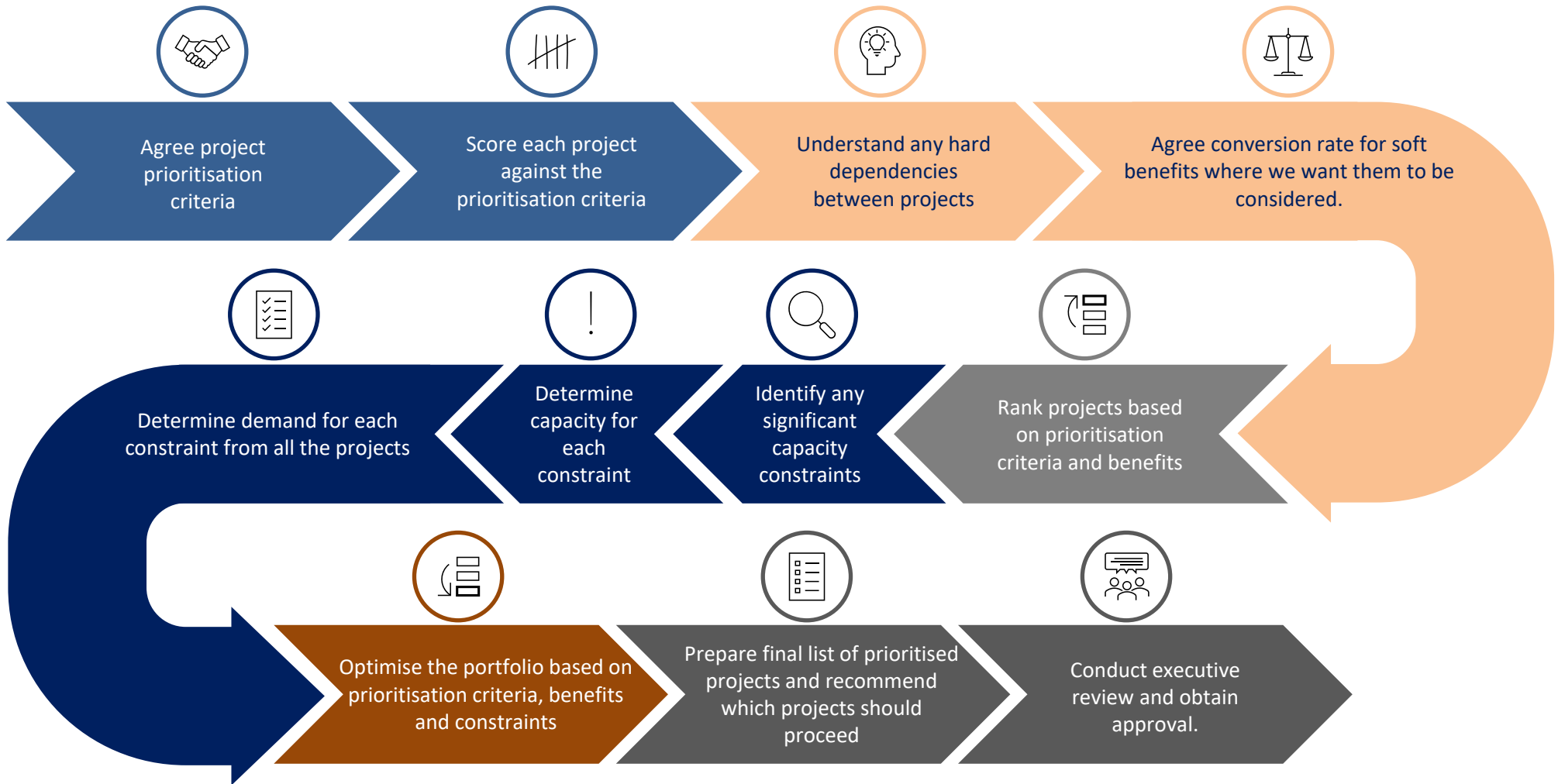


The Portfolio Optimisation Tool helps clients manage and prioritise their project portfolios based on a set of business priorities and deliverability constraints.

Key features of the Portfolio Optimisation Tool include:

- Capture business and deliverability factors, constraints and strategic pillars used for determining prioritization
- Collect key project information used for prioritization including dependency with other projects
- Provide recommendation on project prioritization according to alignment to organisational objectives with an overlay of available capacity
- Provide summary dashboard for leadership view on project ranking and business versus deliverability factors.
- Allows executives to override prioritization recommendation and reflect group's final prioritization but showing loss of benefits and resource gaps.

# Portfolio Optimisation Process





- provides a base set of business priority factors and deliverability factors which can be customised for each organisation
- includes draft weightings of each factor which can be adjusted for each organisation
- provides an input form to capture the key characteristics of a project
- calculates a weighted score for each project based on the business priority and deliverability factors
- produces a ranking of projects based upon their weighted scores
- provides a summary dashboard of project's business priority vs deliverability
- assists in calculating the revised capacity of the organisation based on a set of constraints
- assists in aligning the revised portfolio with the revised capacity
- captures management decisions regarding project priorities discussed in prioritisation sessions

# Sample Project prioritisation factors

*For each project, the project related factors to be considered during the project prioritisation include:*

Business Factors (fixed, cannot be deleted)	Deliverability Factors
<ul style="list-style-type: none"><li>• Speed to value</li><li>• Benefits over remaining costs</li><li>• Alignment to IT Roadmap.</li></ul>	<ul style="list-style-type: none"><li>• Delivery risk (0%-100%)</li><li>• Benefit Risk (0%-100%)</li><li>• Support Risk (0%-100%)</li><li>• Peak Resource Requirements (FTE)</li><li>• # of Programs it is dependent on</li></ul>

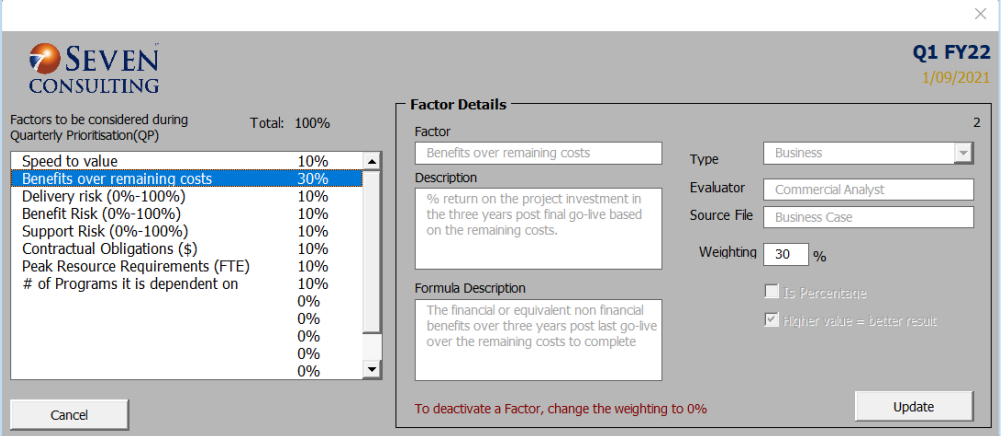
Additional business and delivery factors can be added for each client environment. Seven Consulting will work with our clients to configure the tool for your environment, projects, factors and constraints.

The following slides provide some examples of the data captured in the Portfolio Optimisation Tool and some of the graphs/reports it produces.

# Capturing factors and constraints

## Prioritisation Factors

Lists the factors that should be used to prioritise projects. Each factor can be weighted to reflect its relative importance..



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Factors to be considered during Quarterly Prioritisation(QP) Total: 100%

Factor	Weight
Speed to value	10%
<b>Benefits over remaining costs</b>	<b>30%</b>
Delivery risk (0%-100%)	10%
Benefit Risk (0%-100%)	10%
Support Risk (0%-100%)	10%
Contractual Obligations (\$)	10%
Peak Resource Requirements (FTE)	10%
# of Programs it is dependent on	0%
	0%
	0%
	0%
	0%

**Factor Details** 2

Factor: Benefits over remaining costs Type: Business

Description: % return on the project investment in the three years post final go-live based on the remaining costs.

Evaluator: Commercial Analyst Source File: Business Case

Weighting: 30 % ☐ Is Percentage ☒ Higher value = better result

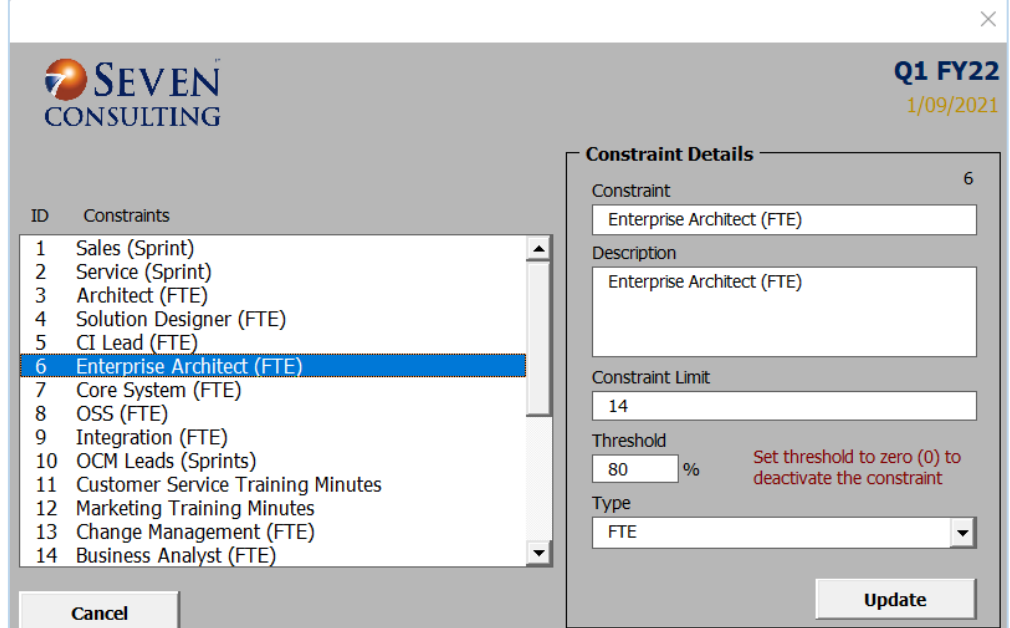
Formula Description: The financial or equivalent non financial benefits over three years post last go-live over the remaining costs to complete

To deactivate a Factor, change the weighting to 0%

Cancel Update

## Portfolio Constraints

Lists the constraining factors that may prevent successful delivery of your projects.



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ID Constraints

1	Sales (Sprint)
2	Service (Sprint)
3	Architect (FTE)
4	Solution Designer (FTE)
5	CI Lead (FTE)
<b>6</b>	<b>Enterprise Architect (FTE)</b>
7	Core System (FTE)
8	OSS (FTE)
9	Integration (FTE)
10	OCM Leads (Sprints)
11	Customer Service Training Minutes
12	Marketing Training Minutes
13	Change Management (FTE)
14	Business Analyst (FTE)

**Constraint Details** 6

Constraint: Enterprise Architect (FTE)

Description: Enterprise Architect (FTE)

Constraint Limit: 14

Threshold: 80 % Set threshold to zero (0) to deactivate the constraint

Type: FTE

Cancel Update

# Capturing the key characteristics of each project

Portfolio and Project Details

**Portfolio Summary**

Total Budget \$	TBD	Projects	Budget	Remaining Budget
\$80,753,000		0	0	0
Total Remaining Budget \$	Proceed	20	27,028,000	17,358,000
\$38,328,000	Reserve	6	10,372,000	6,570,000
	Backlog	12	43,353,000	14,400,000

Projects	Budget	Remaining Budget	ADVIC
Mandatory 13	21,518,000	14,928,000	At least 1 constraint exceeded. Revise Final selection
Strategic 25	59,235,000	23,400,000	

☐ DES  
☒ QP

ID	Projects	Type	Rank	Demand State	Final Decision
38	Orange Dots	Mandatory	1	Proceed	Proceed
39	Coding League	Mandatory	2	Proceed	Proceed
13	Disruptor Training	Mandatory	3	Proceed	Proceed
32	The Violent Storms	Mandatory	4	Proceed	Proceed
31	Center for Creative Coding	Mandatory	5	Proceed	Proceed
37	Only Project Experience	Mandatory	6	Proceed	Proceed
36	The Domain of Work	Mandatory	7	Proceed	Proceed
25	The Discovery of Era	Mandatory	8	Backlog	Proceed
6	Indie Profilers	Mandatory	9	Proceed	Proceed
26	Dangerous Rocks	Mandatory	10	Backlog	Proceed
9	Open Source Pundits	Mandatory	11	Proceed	Proceed
5	Search Engine Bandits	Mandatory	12	Proceed	Proceed
7	Static Startup	Mandatory	13	Proceed	Proceed
8	Celestial Interface	Strategic	1	Proceed	Proceed
10	Java Dalia	Strategic	2	Proceed	Proceed
23	Switch and Swift	Dial Mover	3	Proceed	Reserve
16	Yellow Moose	Strategic	4	Proceed	Reserve
11	Rhinestone	Dial Mover	5	Proceed	Reserve
29	PepperSmith	Strategic	6	Backlog	Proceed
12	No-Bull Bootcamp	Dial Mover	7	Proceed	Reserve
24	Robust Routine	Dial Mover	8	Proceed	Backlog
27	Software Chasers	Dial Mover	9	Backlog	Proceed
17	Yosemite	Strategic	10	Backlog	Backlog

**Q1 FY22**  
1/09/2021

Project Summary | Factors | Demand Constraints | Dependency | Constraints

**Input Project Summary**

Project Name  
Orange Dots

Description

Project Manager  
Spencer Tracy

Sponsor  
Charlize Theron

Portfolio Lead  
Leo McCarey

Phase  
QP

Type  
Mandatory

Category  
New

Pillars  
Customer Connections

Project Start  
9 5 2021

Project Finish  
5 5 2023

Market Launch  
5 7 2021

Benefit Start  
4 9 2021

Project Duration (mons)  
23.87

Remaining Duration (mons)  
20.09

% Confidence  
100 %

Project Code  
A71

Dial Mover Category

Discovery  
Yes

Total Budget (WoL)\$  
2,360,000 \$

Remaining Cost (WoL)\$  
0 \$

In Year Benefits  
0 \$

Benefit Over 3 yrs Post Go Live \$  
0 \$

P and L  
No

**Make FINAL DECISION**

Selection  
Proceed

Demand State  
Proceed

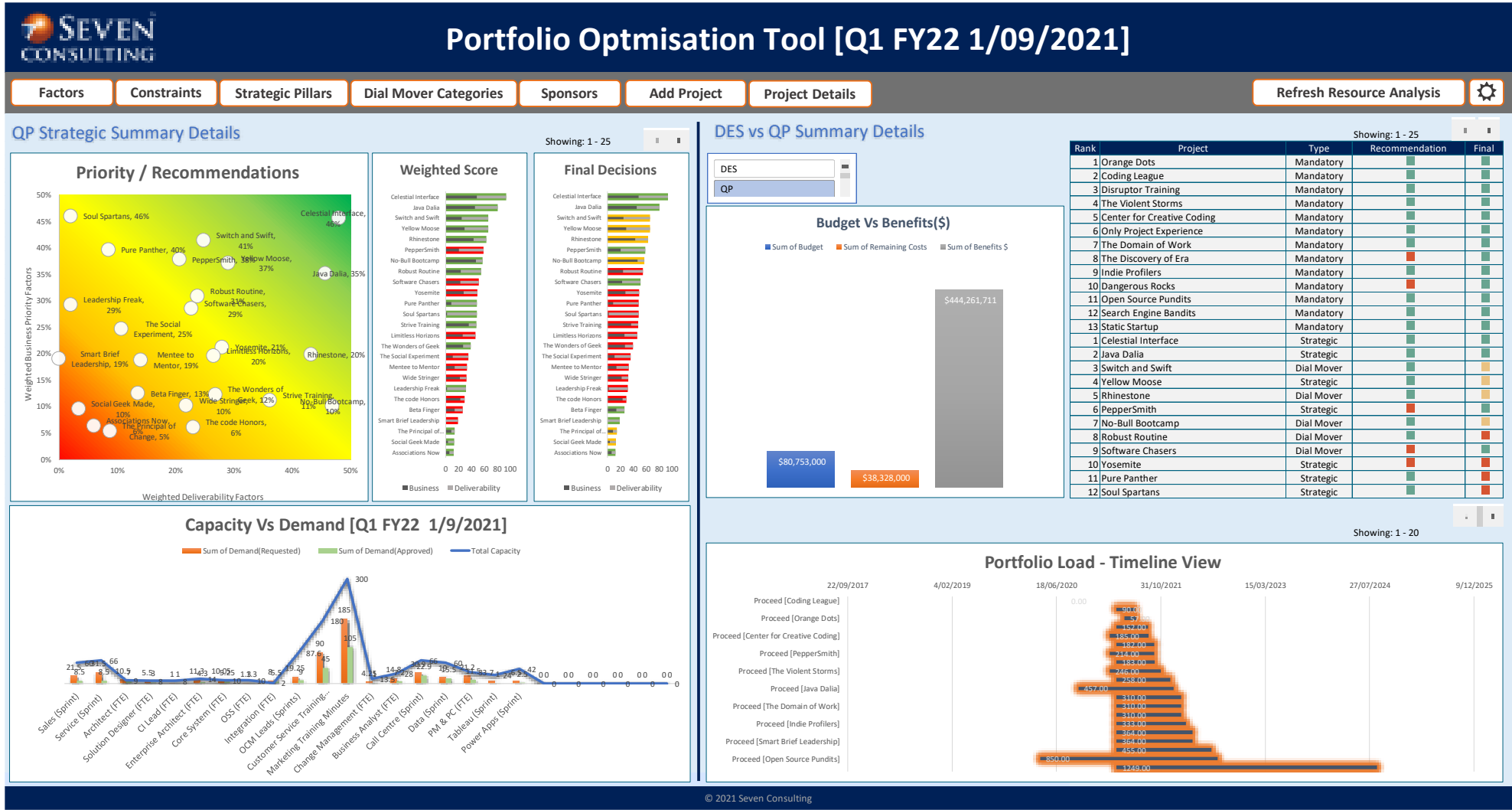
Rank  
1

Score  
-21.99

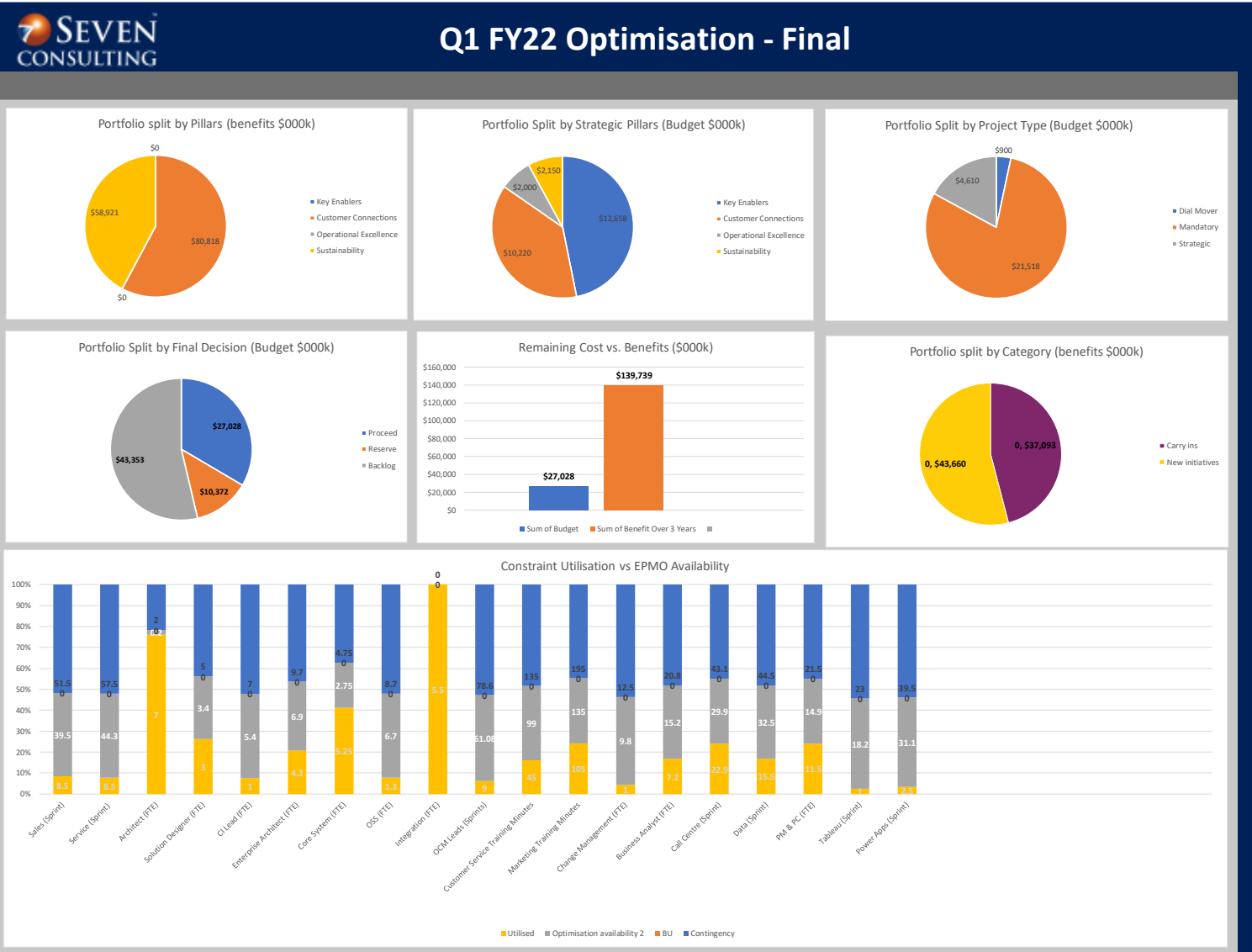
Decision Commentary

Cancel | Update Details | Delete Project

# Portfolio Optimisation Tool - Sample Dashboard



# Portfolio Optimisation Tool - Sample Report



# Expected Outcomes from the Portfolio Review

- Prioritised view of the project portfolio – projects will have been prioritised based on a set of weighted criteria agreed with stakeholders
- Decisions will have been made on which projects should be started, stopped or deferred
- Updated view on the delivery capacity of the organisation to deliver projects in the current environment
- Increased management confidence that the organisation is spending its funding on the right projects in the current environment
- An ongoing framework which can be reviewed on a regular basis to confirm that funding and resourcing is still be allocated to the most important projects

# Portfolio Optimisation Tool - indicative implementation

## Activities

Understand and agree weighted priorities and constraints.

Understand and agree current and potential projects, associated delivery requirements and alignment to organizational priorities.

Updating tool to reflect organizational priorities.

Hold initial review meeting.

Issue draft portfolio report and review with key stakeholders.

**Final Report.**  
Issue final report for sign-off. Give notice to projects to proceed

**Week 1**

**Week 2**

**Week 3**

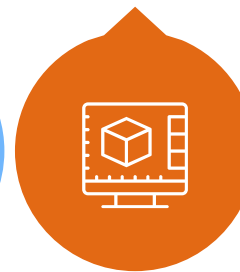
**Week 4**

**Week 5**

**Week 6**

**Week 7**

**Week 8**



List weighted decision-making factors.

List of current projects, their plans and risks.

Updated tool and initial weighted project score.

Hold initial review meeting.

Draft Portfolio Delivery Report.

Final Portfolio Delivery Report.

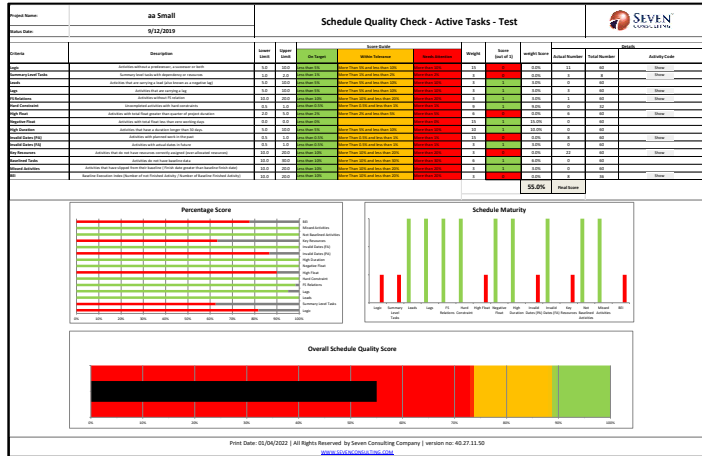
## Outputs





# Other Seven Consulting Tools

## Health Check Tool



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

Key features include:

- Health check
- Schedule maturity
- Overall schedule quality score

## Schedule Dashboard

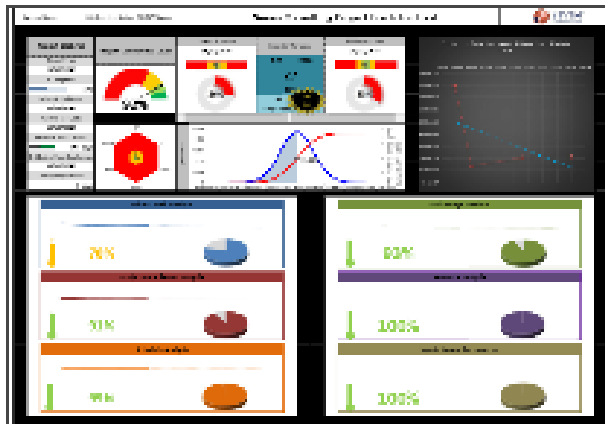


The Schedule Dashboard combines a number of reports to provide a 'Dashboard', or snapshot of Agile projects progress.

Key features include:

- Weekly velocity
- Earned Value
- Task burndown
- Effort Tracking

## Schedule Predictor

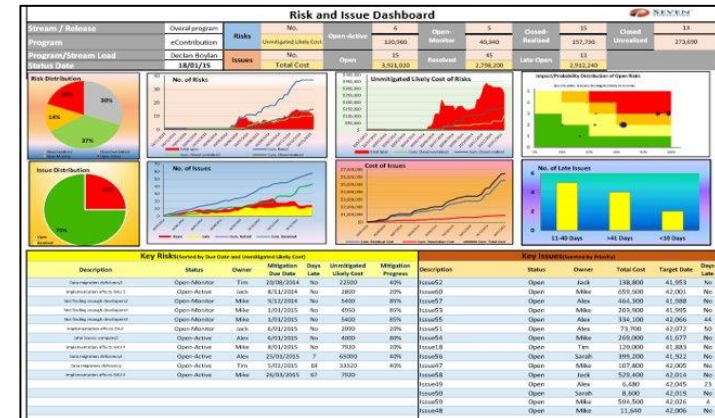


The Schedule Predictor Tool uses advanced algorithms to evaluate the precision of project forecast date and PM expectation finish date according to their actual performance. It provides a prediction trend line to suggest improvement areas.

### Key features include:

- Project confidence level
- Critical path analysis
- Cumulative probability

## Risk and Issues Dashboard



The Risk and Issue Dashboard analyses the project risk and issue registers to provide a view of key metrics that include aging, cost, quantities by project phase and severity.

### Key features include:

- Issue tracking by status, cumulative issues over time, number of late issues, estimated cost of issues
- Risk tracking by status, cumulative risks over time, likely cost of unmitigated risks, impact/probability distribution of open risks

# Improve Project Success Rates with Pathfinder

1. Follow a consistent approach to customise and optimise project delivery based each project's and organisation's key characteristics.
2. Reduce the level of project management oversights or omissions.
3. Identify delivery approach risks and mitigants.
4. Create a draft schedule in MS project or JIRA with streams, phases, deliverables, tasks and dependencies.
5. Enable better project outcomes.
6. All in 30 minutes or less.



Visit us for more information:

<https://www.sevenconsulting.com/project-pathfinder/>

## Our projects so far:

**2007**  
Villawood Detention Centre  
(Sydney)

**2008**  
South Australian Detention Centre  
(Sydney)

Seven Consulting regularly gives back to the wider community, supporting our team and their families in voluntary projects to assist those who find themselves in need of help.

**2011**  
Cambodian School Build (Sydney)



**2012**  
Barnardos Kingston House (Sydney)



**2013**  
Youth off the Streets (Sydney)



**2015**  
• Jesuit Refugee House – Blaiket (Syd)  
• Hanover Crisis Centre (Melb)



**2019**  
• Avalon Centre (Melbourne)  
• Dignity.org.au (Sydney)  
• Bahay San Jose –House with No Steps Foundation (Manila)



**2018**  
• Erin's Place (Sydney)  
• Concordia Childrens Services (Manila)  
• Mad Women Foundation (Melb)



**2017**  
• Launch Housing (Melbourne)  
• Cerebral Palsy Foundation (MNL)



**2016**  
Marian Villa (Sydney)



**2020 – DONATION DRIVE**  
Project 7 gave back to the community, by donating \$104,000 across 29 charities, enabling these organisations to create real change in the lives of those who need it most.



### 2021 – Mini Project 7

In 2021, Seven Consulting continued to acknowledge the importance of fostering a community presence. Seven Consulting team members across three cities were able to participate in multiple mini projects this year to see our Project 7 commitment through.

### 2022

- M.A.D. Woman (Melbourne) *The pencil case challenge*
- Bahay ni Maria and Tahanan ng Pagmamahal (Manila)







# SEVEN CONSULTING DELIVERY SUMMIT



The purpose of the Seven Consulting annual Delivery Summit is to share our clients' best practice in program and project delivery. It also serves as a celebration of success and a thank you, training and networking opportunity for our clients and their selected delivery leads.

## Some of the Delivery Summit Speakers include:

**Richard Heeley**, CIO – Head of Technology, Macquarie BFS; **Jacqui Visch**, Chief Technology and Data Officer, AMP; **Tanya Graham** Alinta Energy – Chief Transformation Officer; **Bob Hennessy** Lendlease Group CIO; **Malcolm Pascoe** Former SAI Global, Sydney Trains – CIO; **Owen Eaton**, Business Transformation & Strategy Executive, NAB; **Bob McKinnon**, Co-Founder & Director, Mirin Digital; **Mel Parks**, Chief Transformation Officer, QBE; **Clive Dickens**, VP Product Development, TV and Content, OPTUS; **Dr. Catriona Wallace**, CEO, Ethical AI Advisory; **Mirella Robinson**, CITO – Chief Information; Technology Officer, CBUS; **Nicole Pelchen**, Chief Technology Officer, Link Group; **Seth Holmes**, Chief Transformation, Government Relations & Corporate Services, VicRoads; **Sarah Rees-Williams**, Executive Director, Macquarie Bank; **Nikki Watts**, Division Director, Macquarie Group; **Abdullah Khan**, Former Director, Group Technology, AMP

The 2023 Seven Consulting Delivery Summit received an **NPS of 73**.

## Some of our Delivery Summit Supporting Organisations



Visit us for more information:

[www.sevenconsulting.com/seven-consulting-delivery-summit](http://www.sevenconsulting.com/seven-consulting-delivery-summit)

# Seven Consulting is a proud sponsor of Australia's National Football side, the CommBank Matildas and Australia's Women's Basketball team, the Seven Consulting Opals

We are extremely proud to be official sponsors of Australia's best teams. The CommBank Matildas and the Seven Consulting Opals.

We are also providing paid internships for a number of the Matildas (**Tameka Yallop**, and **Elise Kellond-Knight**), to support their post-sporting careers.

## CONGRATULATIONS

Seven Consulting looks forward to the CommBank Matildas welcoming the world to Australia and a congratulations to the Seven Consulting Opals for winning Bronze in the FIBA Women's World Cup 2022



**Tameka Yallop**

**Elise Kellond-Knight**







**Australia's Best Program Delivery Company**

*Partnering to deliver the change needed for a better future*

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Woolworths   
*The fresh food people*  
Woolworths Group IT  
Exceptional Services Award  
**Winner 2018**



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