Of Benchmarks and Scorecards

Alex S. Brown, PMP

http://www.alexsbrown.com/

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Of Benchmarks and Scorecards

- The "Divide and Conquer" Strategy
- Why Use Them?
- What are the Ten Steps to Success?
- How do we get started?
- Questions & Answers

Divide and Conquer

- Break Down Large, Complex Projects into Smaller Sub-Projects

- Simpler to Manage, Simpler to Report on, BUT…

- "OVERALL How Are We Doing?"

- Senior Management Wants to Know!

Why Use Them?

- Scorecards Provide Status-At-A-Glance
- Benchmarks Provide Concrete Measurement of Progress Against Goals
- Sum Results of Sub-Projects to Overall Scorecards and Overall Benchmarks
- A Strategy to Answer The Question, "OVERALL how are we doing?"

Building an Overall Scorecard

- Some Sub-Projects Have Scorecards, Some May Not

- Overall Scorecard Combines Select Information

- Communicates Related, Relevant Information In One Place

- Keep Management Informed

Sub-Project #1

Sub-Project #2

Sub-Project #3

Sub-Project #4

Overall Project Scorecard

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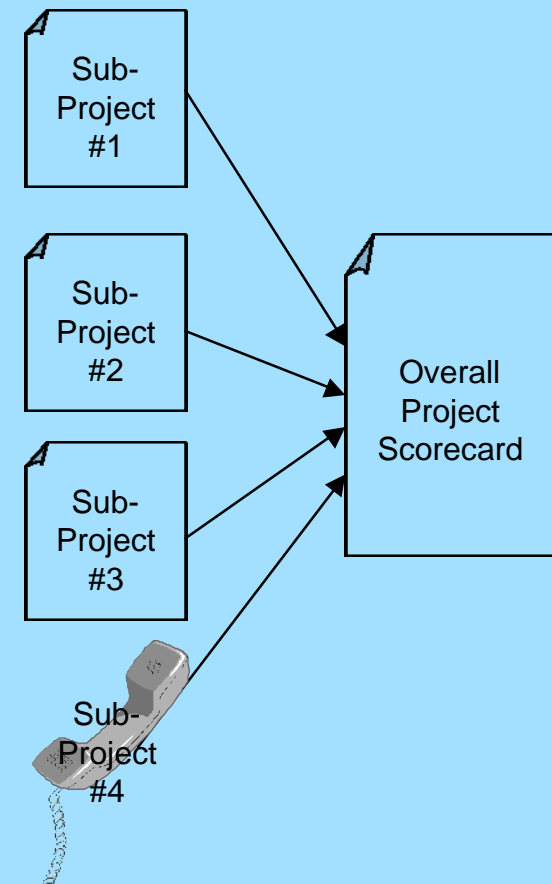
#1: Senior Management Needs

- Senior Management Almost Always the Audience

- Some Needs are Precise and Specific: Exact Measures at Exact Times

- Some Needs are Vague: "What progress have we made?"

- Listen, Listen, Listen, then Ask for More...

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#2: Plan Sub-Project Metrics

- Sub-Project Managers Need Metrics To Manage Each Effort
- Metrics Can Be
  - Traditional PM Measures
  - Domain Specific
- Possibilities are Infinite
- Under Sub-Project Manager's Control (for Now)

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#3: Identify Common Metrics

- Overall Project Manager Searches for Common Metrics Across Sub-Projects
- Sub-Project Managers' Metrics May
  - Be The Same
  - Same with Different Names
  - Different Calculation Methods
- Sub-Project Metrics Often Do Not Meet Senior Managers' Needs

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#4: Negotiate with PMs

- Increase Commonality and Consistency
- Get Consensus on Data Collection Methods, Timing, and Methods of Computation
- Get Everyone Committed to Using Metrics
- Build the Overall Project Management Team
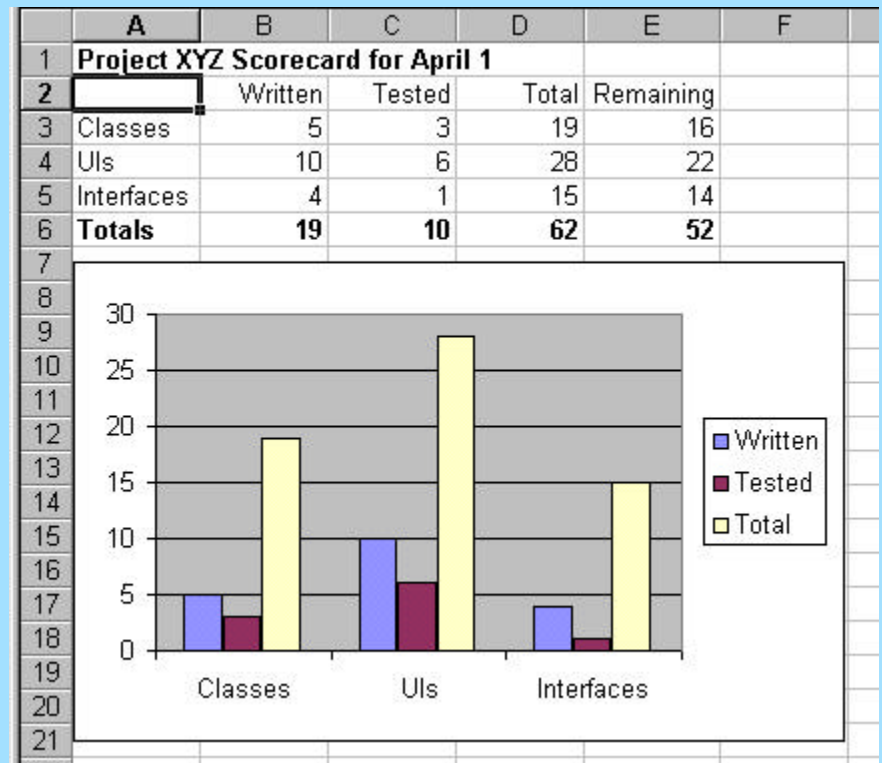- Often the First Negotiation Between the PM Team

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#5: Set Standards

- Document Decisions on Metrics
  - What to collect
  - When to collect it
  - How to compute it
  - How to evaluate it
  - How and when to report it
- Invest Time in Standards to Save Time and Confusion Later

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#6: Create Overall Scorecard

- Logical Order
- Relevant Data
- Totals Clear
- The One-Page Scorecard
- Written for Senior Management

	A	B	C	D	E	F
1	Project XYZ Scorecard for April 1					
2		Written	Tested	Total	Remaining	
3	Classes	5	3	19	16	
4	UIs	10	6	28	22	
5	Interfaces	4	1	15	14	
6	**Totals**	**19**	**10**	**62**	**52**	

Scorecards can combine tables and graphs to show a snapshot of current status

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#7: Create Overall Benchmarks

	A	B	C	D	E	F	G	H	
1	Project XYZ Benchmarks for April 1								
2	Written & Tested		1-Jan	1-Feb	1-Mar	1-Apr	1-May	1-Jun	....
3	Classes	Goal	0	0	5	7	10	12	....
4		Act	0	1	3	3			
5		Variance	0	1	-2	-4			
6									
7	Uis	Goal	0	1	5	15	20	20	....
8		Act	0	2	3	6			
9		Variance	0	1	-2	-9			
10									
11	Interfaces	Goal	0	0	1	3	5	7	....
12		Act	0	0	0	1			
13		Variance	0	0	-1	-2			

- Goals vs. Actuals Over Time
- Link or Sum Sub-Project Benchmarks
- Communicate and Motivate

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#8: Snr. Management Approval

- Get Approval of Target Audience
- Formal, Face-to-Face Meeting
  - Send out materials ahead of time
  - Review and discuss
  - Resolve disagreements
  - Add metrics or eliminate metrics
- Proposed Materials Usually Approved With Minor Changes

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#9: Reporting Phase

- Schedule to Collect and Report Data
  - Sub-Project Level
  - Overall Project Level
- Collect Actuals
- Compare Against Benchmarks
- Review Overall Report
- Submit Report to Senior Management

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#10: Refine and Update

- Change Often Needed
  - Scope changes
  - Phase changes
  - Benchmark goals are unrealistic
- Old Metrics Loose Relevance
- New Metrics Become Critical
- Revise or Redesign as Needed

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How to Get Started

- Keep It Simple
- Choose Metrics that Scale Up
- Do Not Force Inappropriate Metrics on Sub-Projects
- Watch Your Math -- or just keep it simple!
- Plan for Uncertainty
- Benchmarks: Bad Plan or Bad Project?

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More Tips to Get Started

- Keep It Accurate, No Matter How Much It Hurts

- Adjust Metrics and Benchmarks Openly

- Use the Literature -- Domain and PM

- Start with Simple Metrics, Get Sophisticated Later, if at all
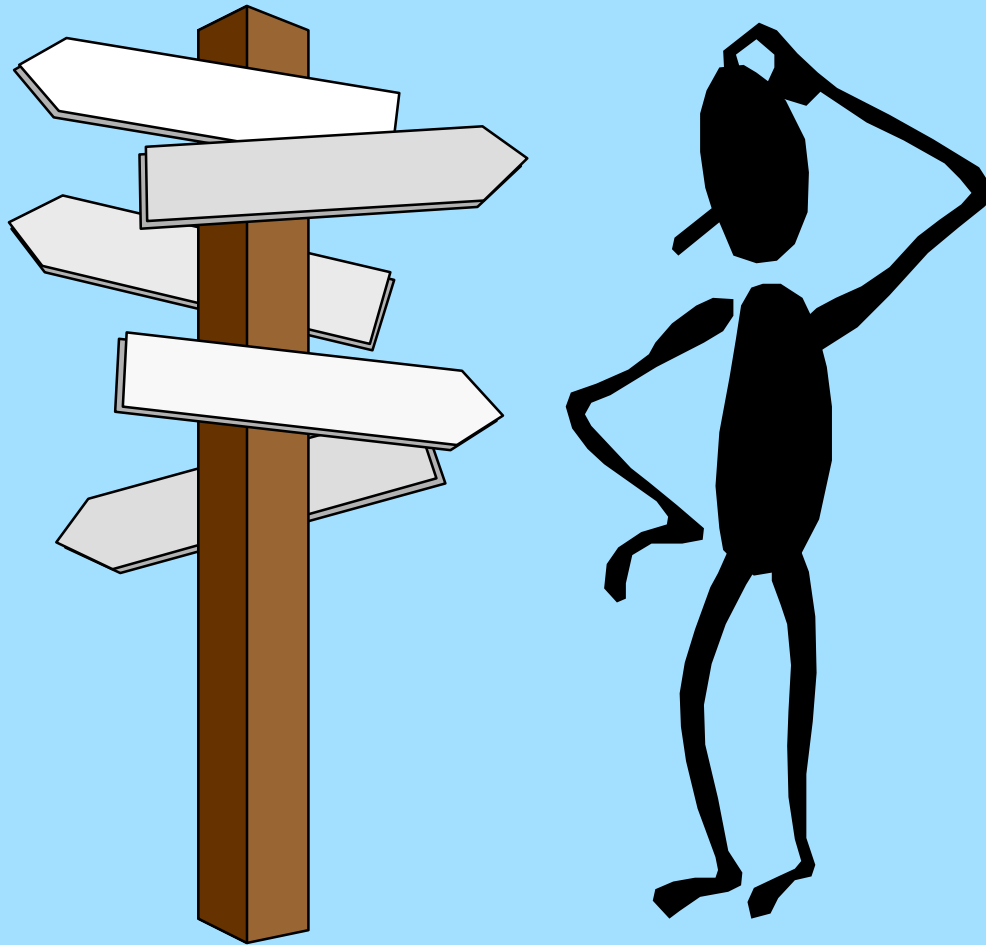
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COMMUNICATION

- Focus on Communication
- Be Creative, Use Color, Use Pictures, Use Text
- Watch Your Audience React
- Show the Forest, Not Just the Trees
- Senior Management View of the Project
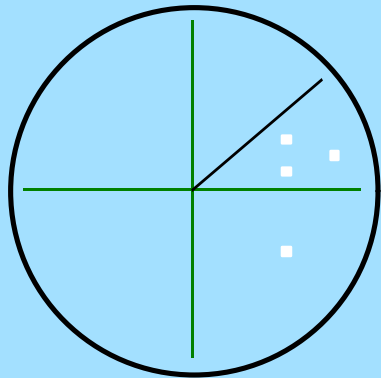- COMMUNICATE at All Costs

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Questions & Answers

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