Project Health and Review Module

Search

Hello John.

Overview

PHaRM is used to capture and maintain project review information while reflecting overall project health. The goal is to focus maximum attention on projects-at-risk and less on those performing well, resulting in more efficient use of management time and improved aggregate performance.

Projects and their attributes are characterized as red (at-risk), amber (transitional), or green (good). The dashboard displays details for projects connected to the user's focus region and/or business line.

View All Projects

Attribute Mean Values

- Choose Viewing Option -

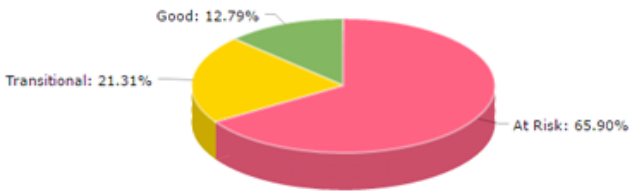
	Current	3 Mos.	6 Mos.	9 Mos.	12 Mos.	Range
Overall Health						
Variance						
Scope						
DSO (AR + WIP)						
Schedule						
Quality						
Risk Management						
Communication						
Client Satisfaction						

SCROLL DOWN

Table represents historical values over past 12 months

Aggregate Project Health

ALL PROJECTS



REGIONS

West	40%	50%	10%	95
MidAmerica	40%	50%	10%	95
MidAtlantic	40%	50%	10%	95
Northeast	40%	50%	10%	95
Southeast	40%	50%	10%	95

BUSINESS LINES

Water	40%	50%	10%	95
Facilities	40%	50%	10%	95
Construction Services	40%	50%	10%	95

MY PROJECTS

Project Principal	40%	50%	10%	10
Project Manager	40%	50%	10%	11

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View All Projects

Attribute Mean Values

Construction Services

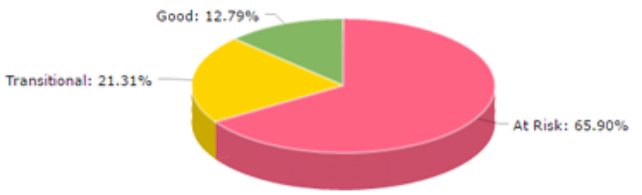
	Current	3 Mos.	6 Mos.	9 Mos.	12 Mos.	Range
Overall Health	12.0	16.0	14.0	11.0	21.0	0 --> 53
Variance	1.9	1.5	1.8	1.6	0.9	0 --> 6
Scope	0.5	0.8	0.8	0.6	0.5	0 --> 3
DSO (AR + WIP)	2.1	1.5	1.8	1.6	0.9	0 --> 3
Schedule	0.2	0.2	0.7	0.1	0.1	0 --> 3
Quality	0.8	0.8	0.8	0.6	0.5	0 --> 3
Risk Management	1.0	0.9	0.8	1.1	0.7	0 --> 3
Communication	2.4	2.0	1.9	1.6	1.1	0 --> 3
Client Satisfaction	1.7	1.5	1.8	1.6	0.9	0 --> 3

SCROLL DOWN

Table represents historical values over past 12 months

Aggregate Project Health

ALL PROJECTS



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MidAtlantic	40%	50%	10%	95
Northeast	40%	50%	10%	95
Southeast	40%	50%	10%	95

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Facilities	40%	50%	10%	95
Construction Services	40%	50%	10%	95

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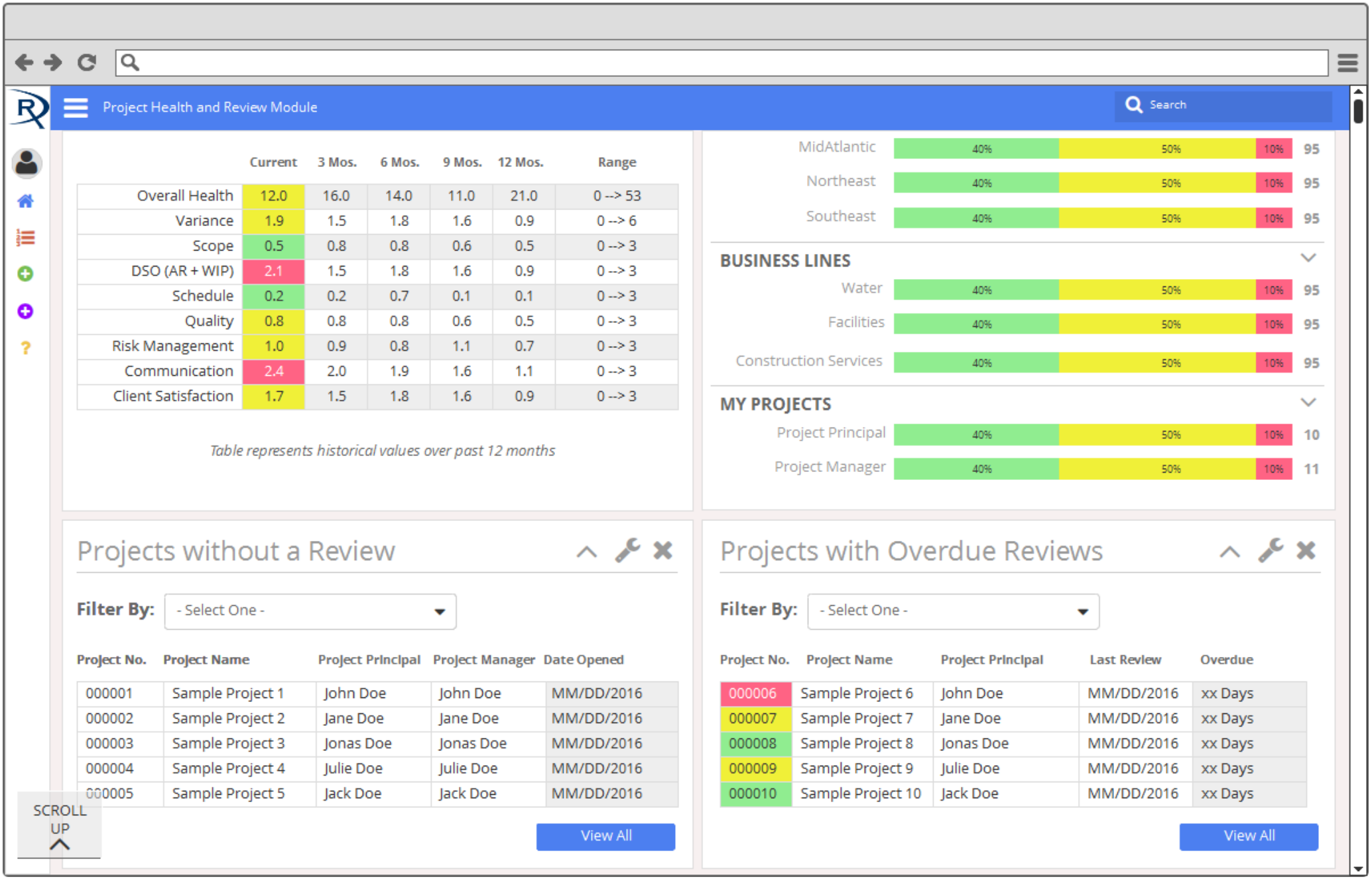
Project Principal	40%	50%	10%	10
Project Manager	40%	50%	10%	11


Project Health and Review Module
Search
Current
3 Mos.
6 Mos.
9 Mos.
12 Mos.
Range
Overall Health 12.0 16.0 14.0 11.0 21.0 0 --> 53
Variance 1.9 1.5 1.8 1.6 0.9 0 --> 6
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DSO (AR + WIP) 2.1 1.5 1.8 1.6 0.9 0 --> 3
Schedule 0.2 0.2 0.7 0.1 0.1 0 --> 3
Quality 0.8 0.8 0.8 0.6 0.5 0 --> 3
Risk Management 1.0 0.9 0.8 1.1 0.7 0 --> 3
Communication 2.4 2.0 1.9 1.6 1.1 0 --> 3
Client Satisfaction 1.7 1.5 1.8 1.6 0.9 0 --> 3
Table represents historical values over past 12 months
MidAtlantic 40% 50% 10% 95
Northeast 40% 50% 10% 95
Southeast 40% 50% 10% 95
BUSINESS LINES
Water 40% 50% 10% 95
Facilities 40% 50% 10% 95
Construction Services 40% 50% 10% 95
MY PROJECTS
Project Principal 40% 50% 10% 10
Project Manager 40% 50% 10% 11
Projects without a Review
Filter By: - Select One -
Project No. Project Name Project Principal Project Manager Date Opened
000001 Sample Project 1 John Doe John Doe MM/DD/2016
000002 Sample Project 2 Jane Doe Jane Doe MM/DD/2016
000003 Sample Project 3 Jonas Doe Jonas Doe MM/DD/2016
000004 Sample Project 4 Julie Doe Julie Doe MM/DD/2016
000005 Sample Project 5 Jack Doe Jack Doe MM/DD/2016
View All
SCROLL UP
Projects with Overdue Reviews
Filter By: - Select One -
Project No. Project Name Project Principal Last Review Overdue
000006 Sample Project 6 John Doe MM/DD/2016 xx Days
000007 Sample Project 7 Jane Doe MM/DD/2016 xx Days
000008 Sample Project 8 Jonas Doe MM/DD/2016 xx Days
000009 Sample Project 9 Julie Doe MM/DD/2016 xx Days
000010 Sample Project 10 Jack Doe MM/DD/2016 xx Days
View All

PHaRM

John Doe
Administrator

- Home
- Projects
- New Scorecard
- New Project Review
- About

SCROLL DOWN

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View All Projects

Attribute Mean Values

- Choose Viewing Option -

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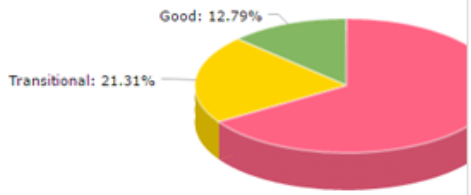
Overall Health	--					
Variance						
Scope						
DSO (AR + WIP)						
Schedule						
Quality						
Risk Management						
Communication						
Client Satisfaction						

Table represents historical values over past 12 months

Aggregate Project Health

ALL PROJECTS



REGIONS

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MidAmerica	40%	50%
MidAtlantic	40%	50%
Northeast	40%	50%
Southeast	40%	50%

BUSINESS LINES

Water	40%	50%
Facilities	40%	50%
Construction Services	40%	50%

MY PROJECTS

Project Principal	40%	50%
Project Manager	40%	50%

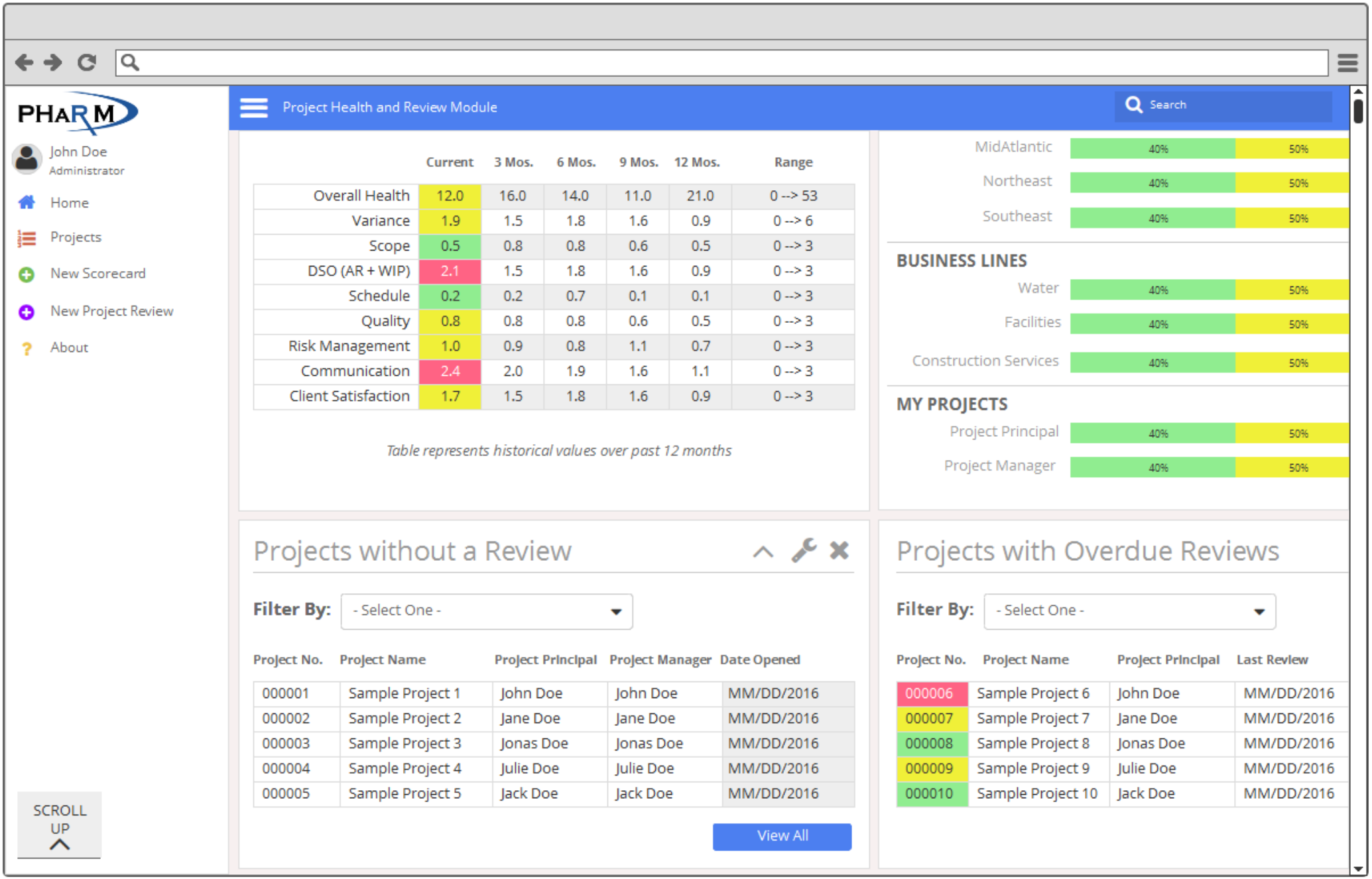
PHARM
John Doe
Administrator
Home
Projects
New Scorecard
New Project Review
About
SCROLL UP
Project Health and Review Module
Search
Current
3 Mos.
6 Mos.
9 Mos.
12 Mos.
Range
Overall Health 12.0 16.0 14.0 11.0 21.0 0 --> 53
Variance 1.9 1.5 1.8 1.6 0.9 0 --> 6
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Table represents historical values over past 12 months
MidAtlantic 40% 50%
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Construction Services 40% 50%
MY PROJECTS
Project Principal 40% 50%
Project Manager 40% 50%
Projects without a Review
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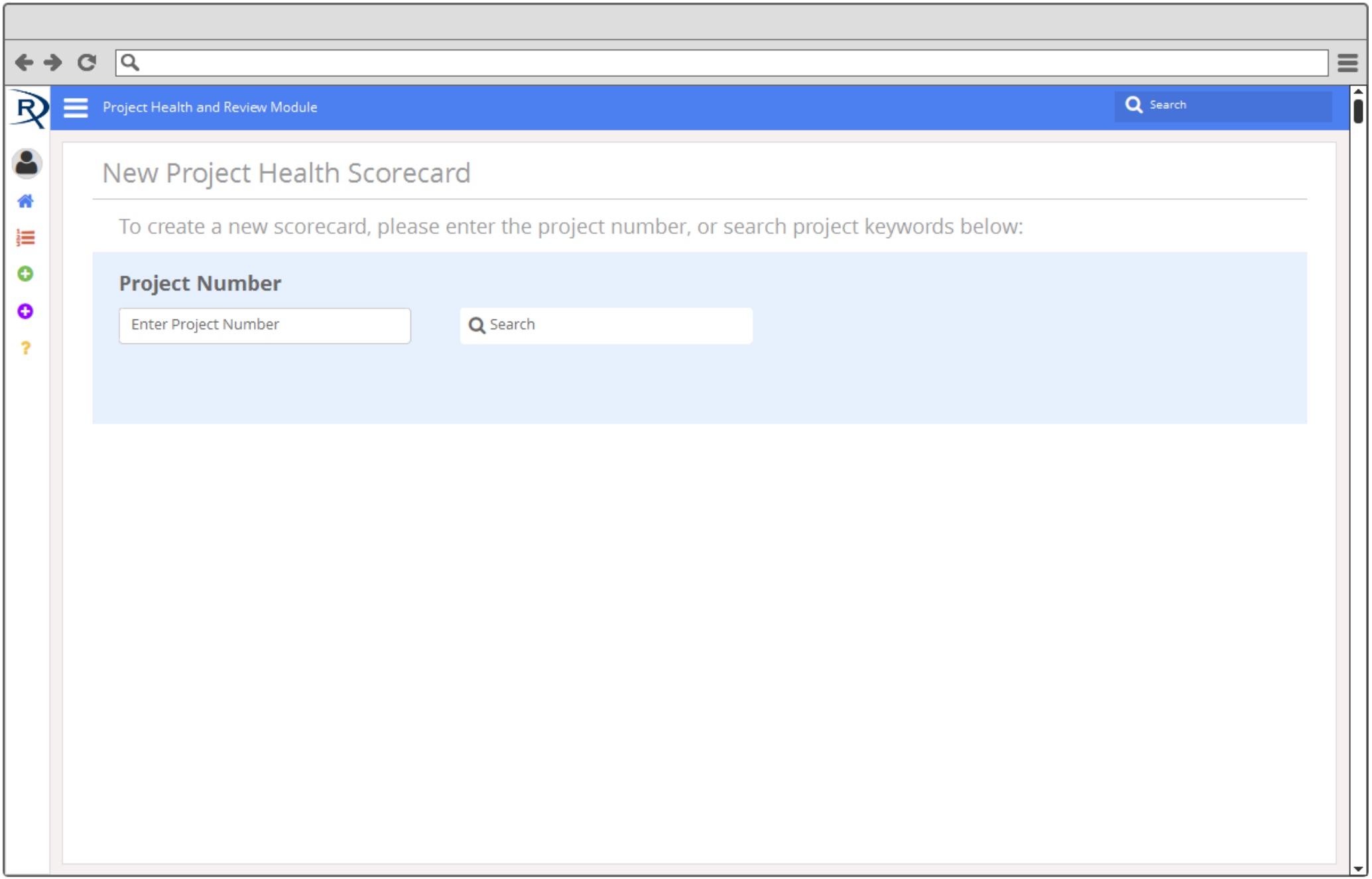
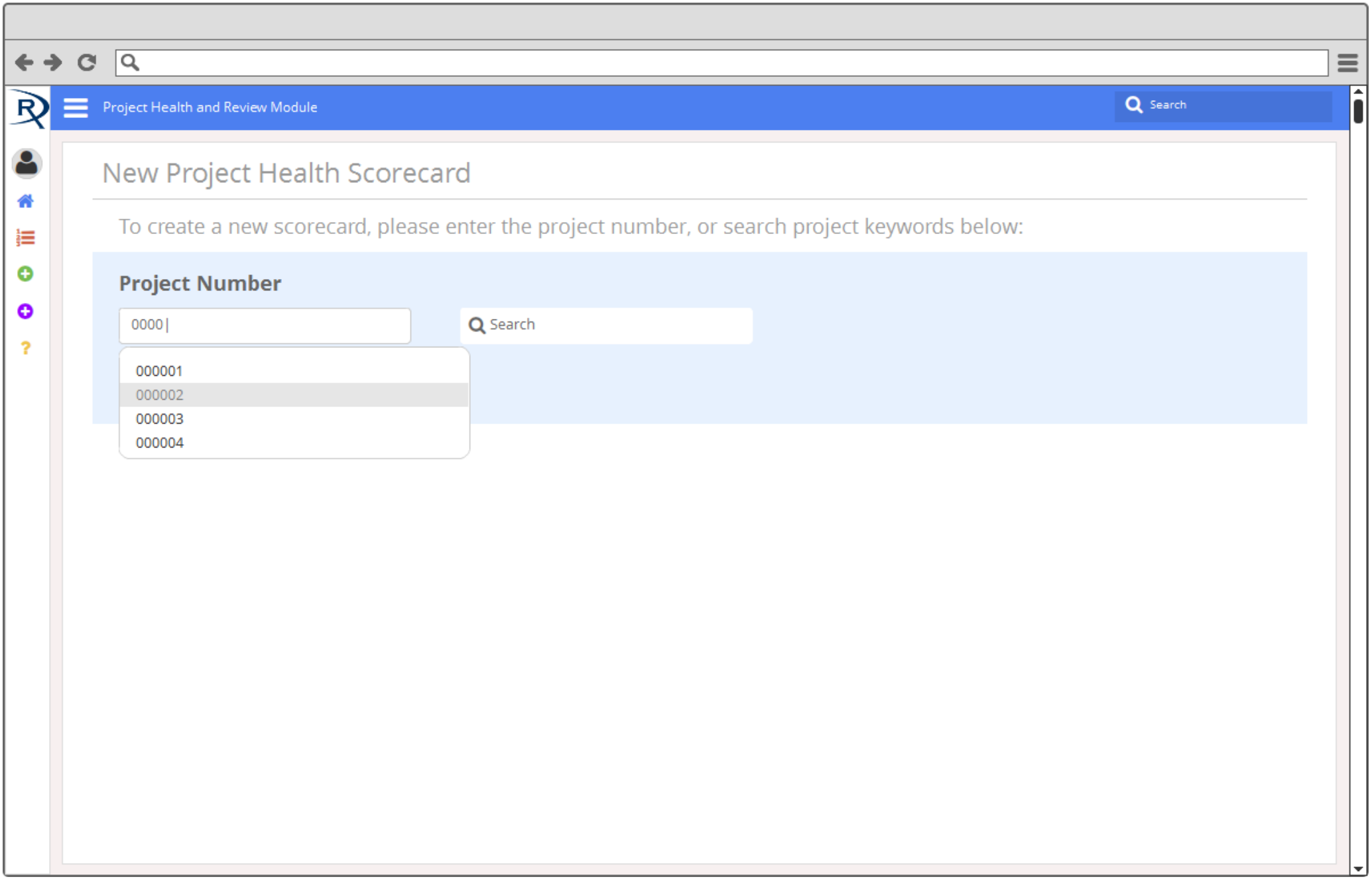
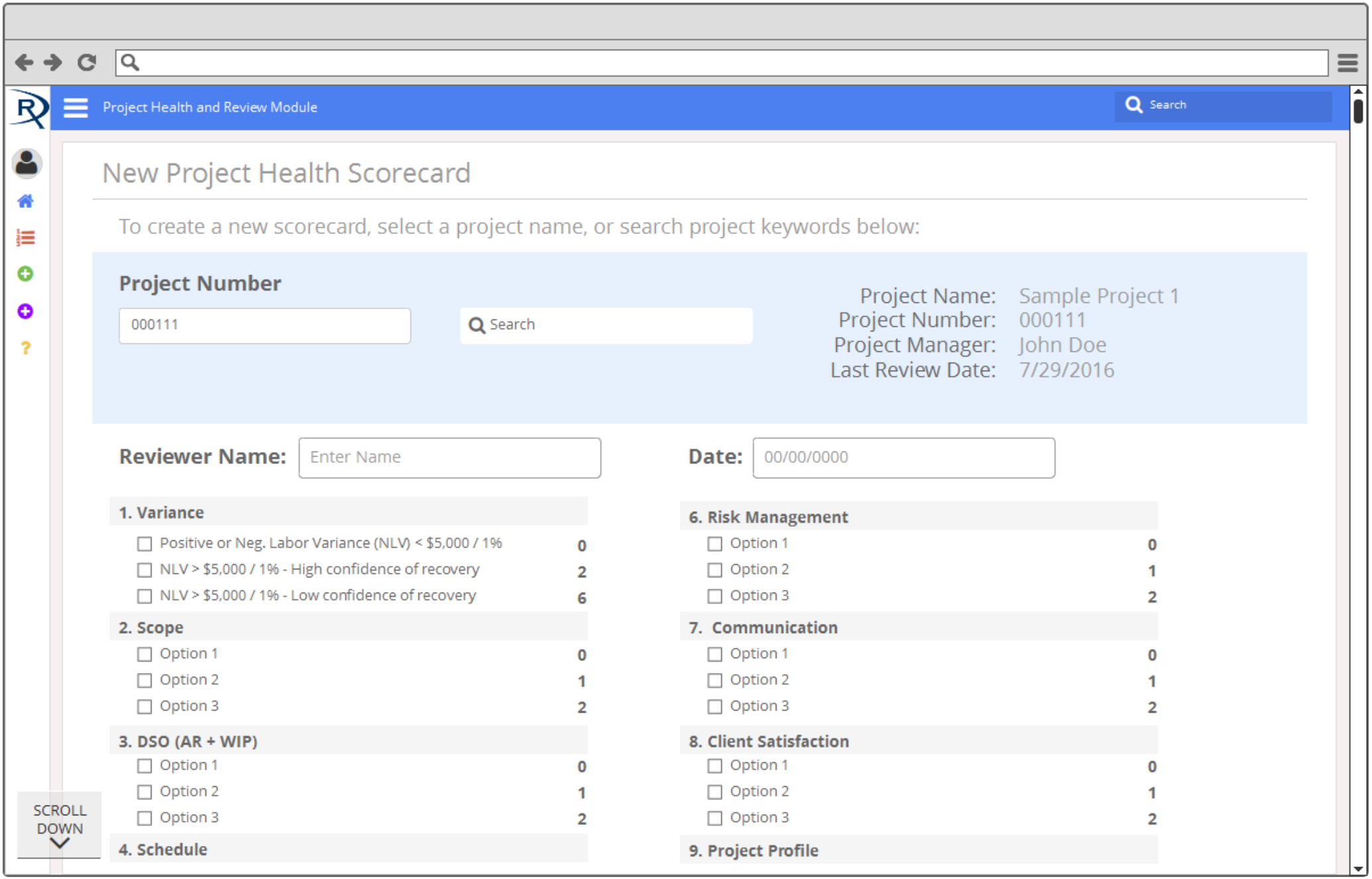
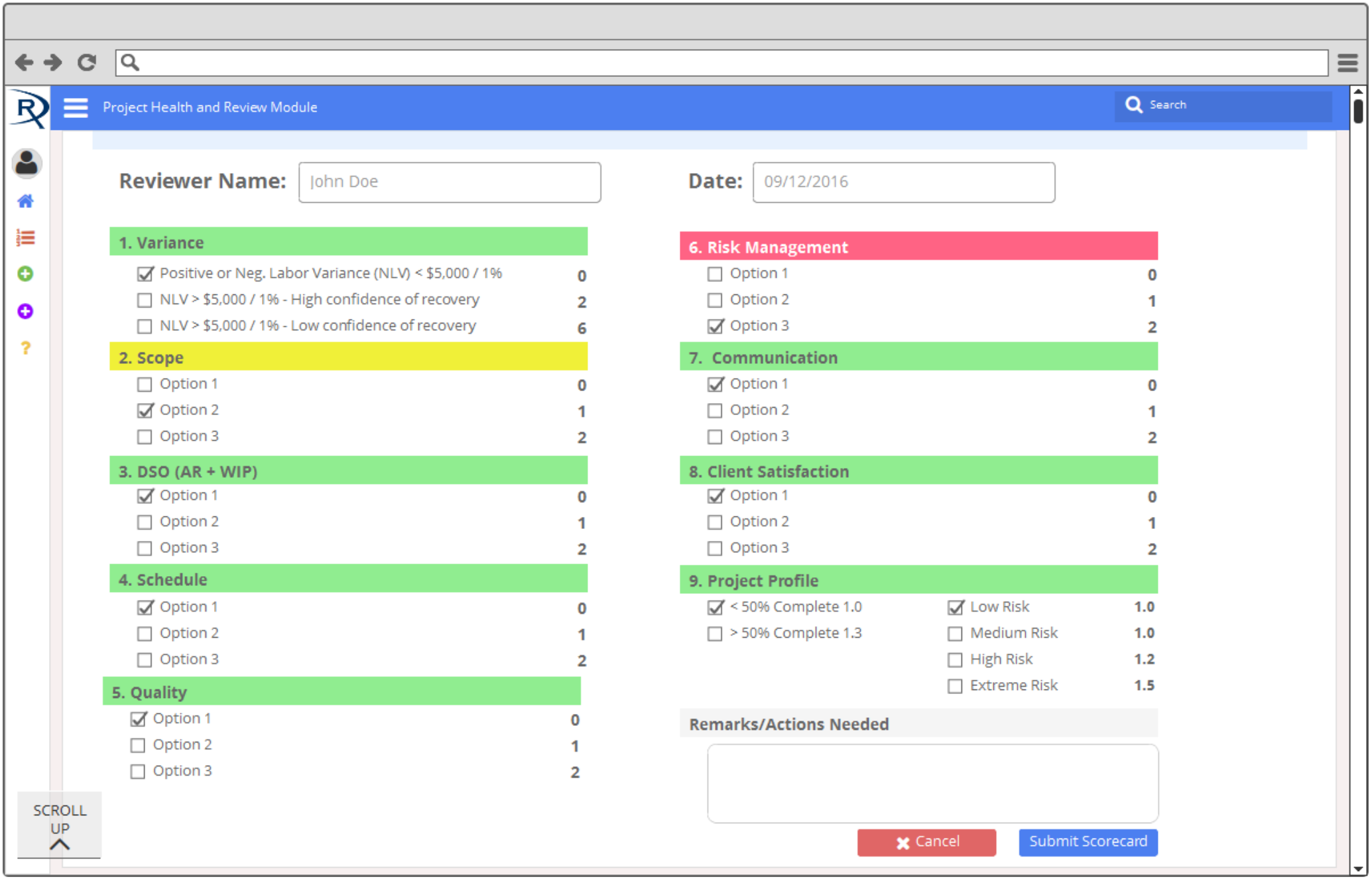
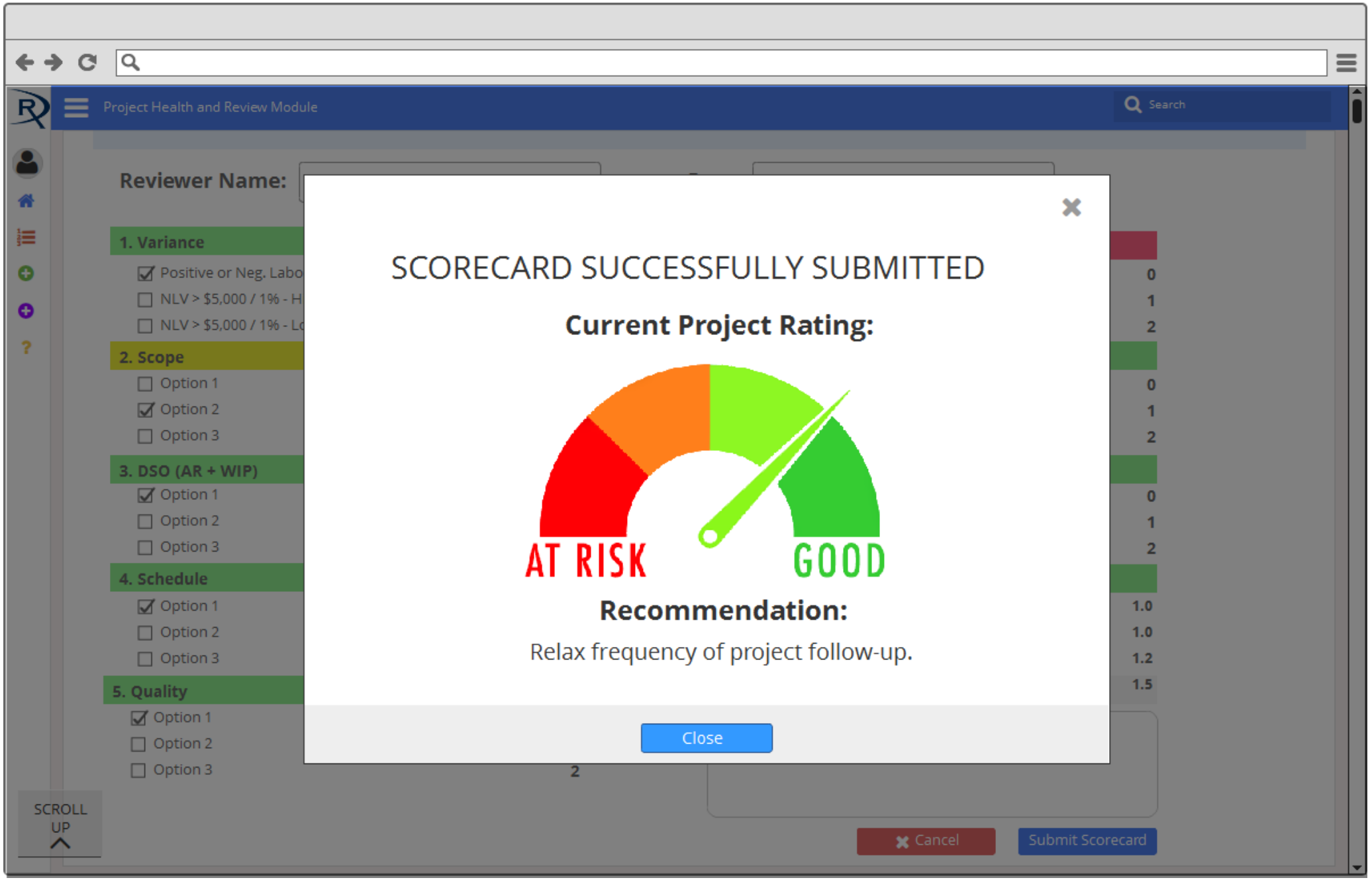
View All
Projects with Overdue Reviews
Filter By: - Select One -
Project No. Project Name Project Principal Last Review
000006 Sample Project 6 John Doe MM/DD/2016
000007 Sample Project 7 Jane Doe MM/DD/2016
000008 Sample Project 8 Jonas Doe MM/DD/2016
000009 Sample Project 9 Julie Doe MM/DD/2016
000010 Sample Project 10 Jack Doe MM/DD/2016


Project Health and Review Module
Search
New Project Health Scorecard
To create a new scorecard, please enter the project number, or search project keywords below:
Project Number
Enter Project Number
Search


Project Health and Review Module
Search
New Project Health Scorecard
To create a new scorecard, please enter the project number, or search project keywords below:
Project Number
0000|
Search
000001
000002
000003
000004


Project Health and Review Module
Search
New Project Health Scorecard
To create a new scorecard, select a project name, or search project keywords below:
Project Number
000111
Search
Project Name: Sample Project 1
Project Number: 000111
Project Manager: John Doe
Last Review Date: 7/29/2016
Reviewer Name:
Enter Name
Date:
00/00/0000
1. Variance
Positive or Neg. Labor Variance (NLV) < $5,000 / 1% 0
NLV > $5,000 / 1% - High confidence of recovery 2
NLV > $5,000 / 1% - Low confidence of recovery 6
2. Scope
Option 1 0
Option 2 1
Option 3 2
3. DSO (AR + WIP)
Option 1 0
Option 2 1
Option 3 2
4. Schedule
6. Risk Management
Option 1 0
Option 2 1
Option 3 2
7. Communication
Option 1 0
Option 2 1
Option 3 2
8. Client Satisfaction
Option 1 0
Option 2 1
Option 3 2
9. Project Profile
SCROLL DOWN


Project Health and Review Module
Search
Reviewer Name:
John Doe
Date:
09/12/2016
1. Variance
Positive or Neg. Labor Variance (NLV) < $5,000 / 1% 0
NLV > $5,000 / 1% - High confidence of recovery 2
NLV > $5,000 / 1% - Low confidence of recovery 6
2. Scope
Option 1 0
Option 2 1
Option 3 2
3. DSO (AR + WIP)
Option 1 0
Option 2 1
Option 3 2
4. Schedule
Option 1 0
Option 2 1
Option 3 2
5. Quality
Option 1 0
Option 2 1
Option 3 2
6. Risk Management
Option 1 0
Option 2 1
Option 3 2
7. Communication
Option 1 0
Option 2 1
Option 3 2
8. Client Satisfaction
Option 1 0
Option 2 1
Option 3 2
9. Project Profile
< 50% Complete 1.0
> 50% Complete 1.3
Low Risk 1.0
Medium Risk 1.0
High Risk 1.2
Extreme Risk 1.5
Remarks/Actions Needed
Cancel
Submit Scorecard
SCROLL UP


Project Health and Review Module
Search
Reviewer Name:
1. Variance
Positive or Neg. Labo
NLV > $5,000 / 1% - H
NLV > $5,000 / 1% - Lo
2. Scope
Option 1
Option 2
Option 3
3. DSO (AR + WIP)
Option 1
Option 2
Option 3
4. Schedule
Option 1
Option 2
Option 3
5. Quality
Option 1
Option 2
Option 3
SCORECARD SUCCESSFULLY SUBMITTED
Current Project Rating:
AT RISK
GOOD
Recommendation:
Relax frequency of project follow-up.
Close
SCROLL UP
Cancel
Submit Scorecard

Project Health and Review Module

Search

[View Project Details](#)

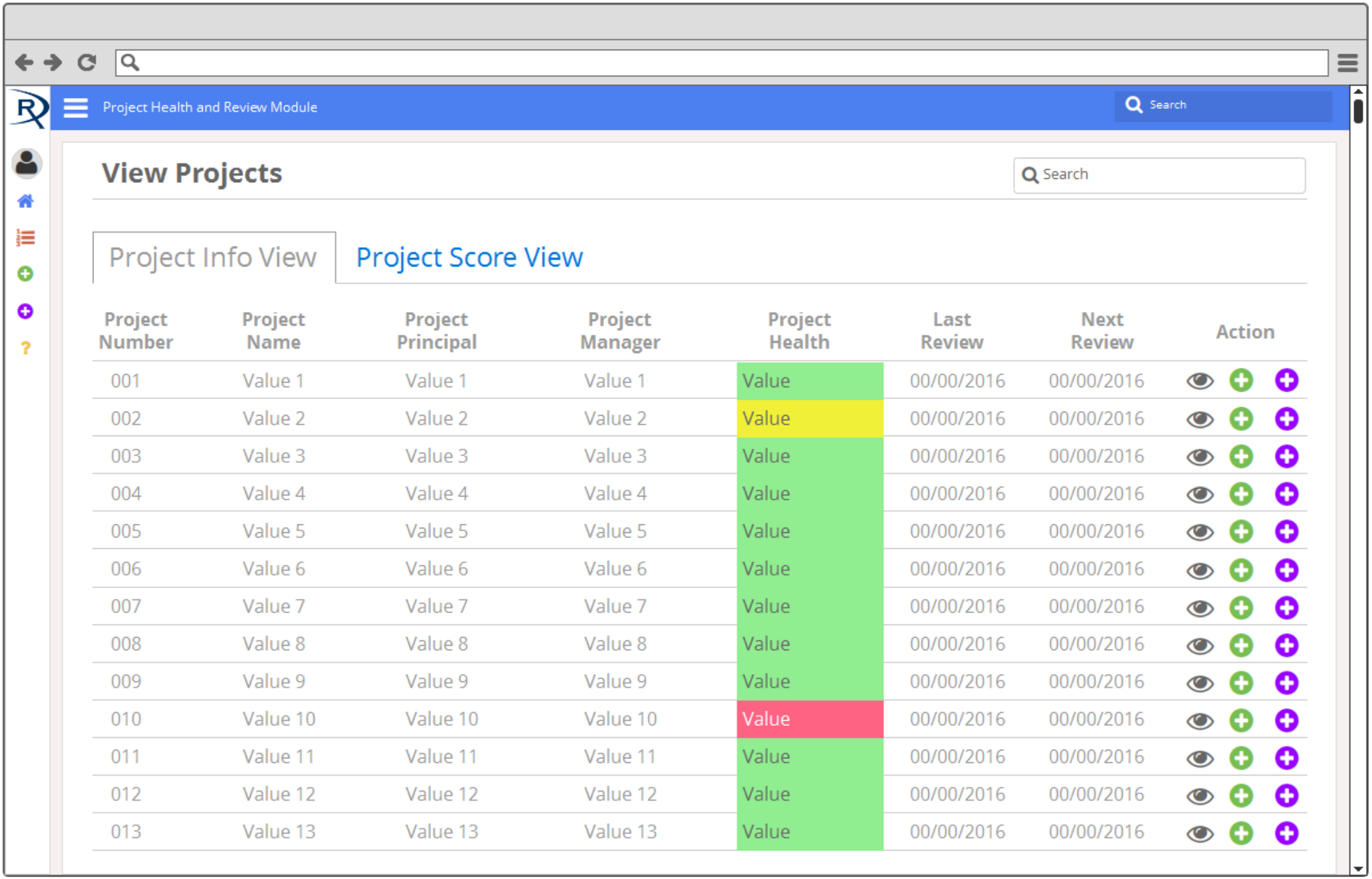
Scorecard Complete

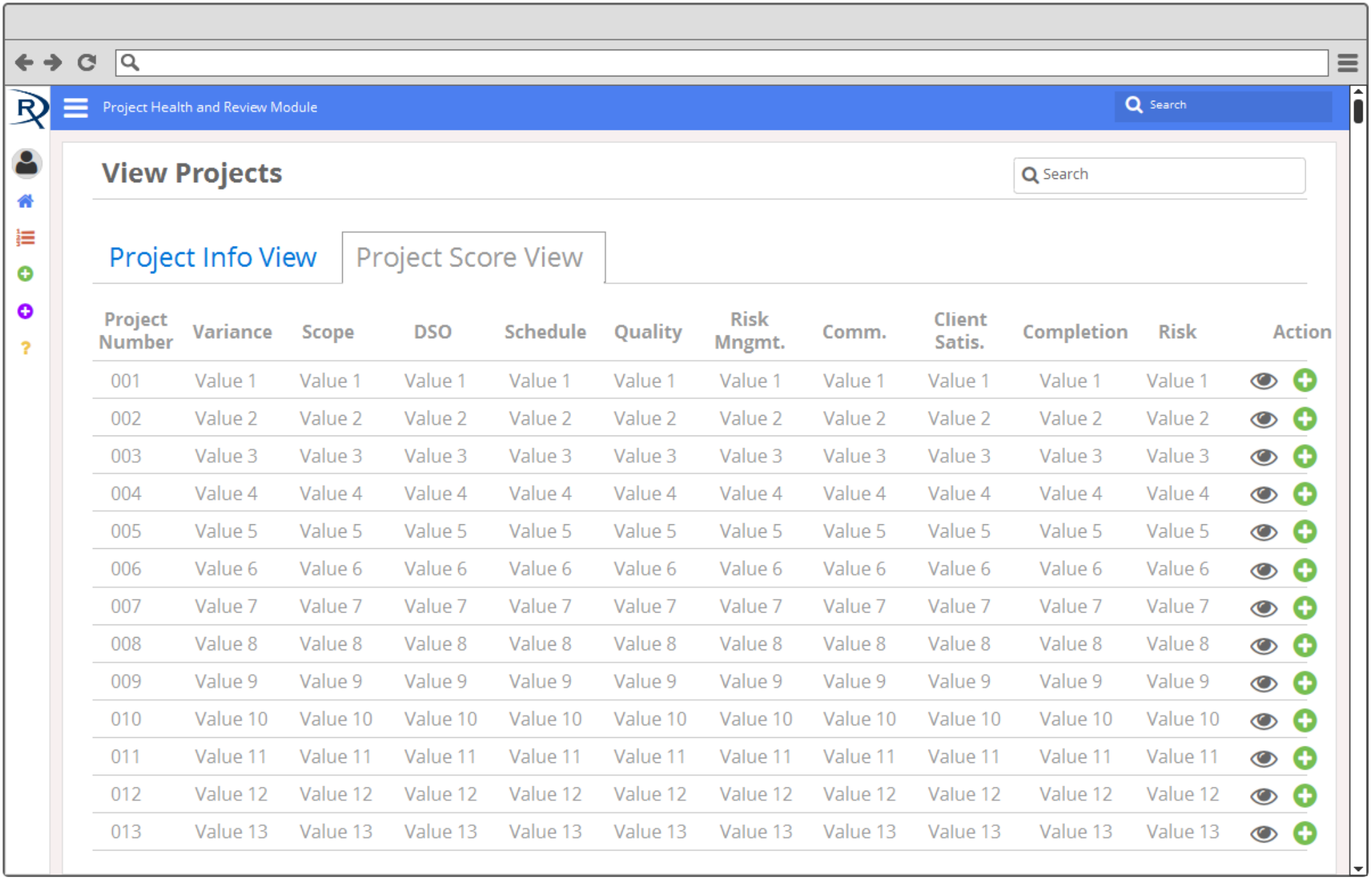
Project Number: 060736
Project Name: WVSTIP

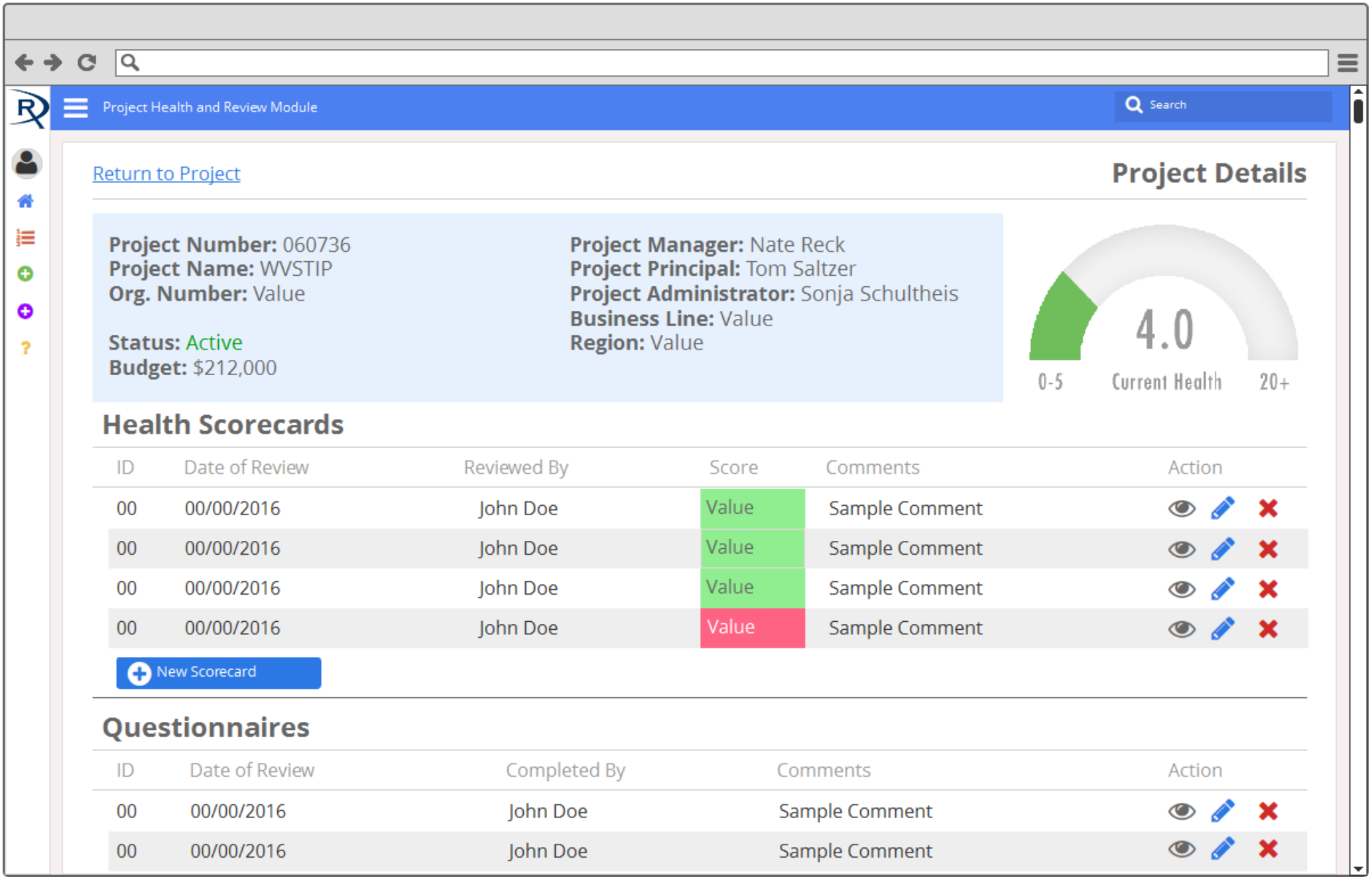
Next Review: 00/00/2016

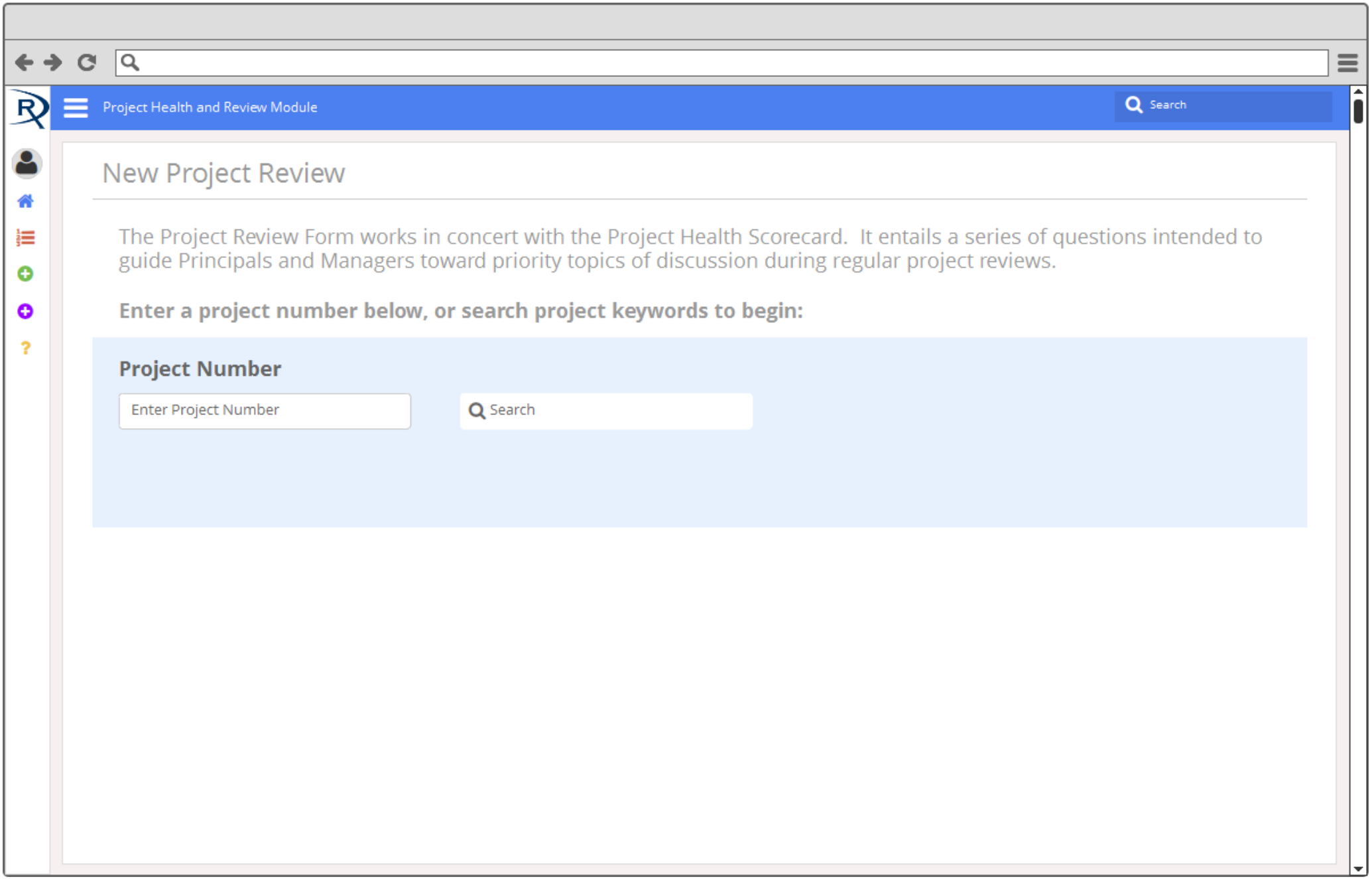
Project Manager: Nate Reck
Date of Review: 00/00/2016

1. Variance		**6. Risk Management**	
Positive or Neg. Labor Variance (NLV) < $5,000 / 1%	0	Project risks not sufficiently identified	3
2. Scope		**7. Communication**	
Out of scope work - High confidence of recovery	1	Direct client communication weekly	0
3. DSO (AR + WIP)		**8. Client Satisfaction**	
DSO ≤ Business Plan Goal	0	Direct client communication weekly	0
4. Schedule		**9. Project Profile**	
Schedule is ahead or on track	0	< 50% Complete 1.0	x 1.0
5. Quality		**Remarks/Actions Needed**	
No quality issues encountered	0	Sample Comments...	


Project Health and Review Module
Search
View Projects
Search
Project Info View
Project Score View
Project Number
Project Name
Project Principal
Project Manager
Project Health
Last Review
Next Review
Action
001 Value 1 Value 1 Value 1 Value 00/00/2016 00/00/2016
002 Value 2 Value 2 Value 2 Value 00/00/2016 00/00/2016
003 Value 3 Value 3 Value 3 Value 00/00/2016 00/00/2016
004 Value 4 Value 4 Value 4 Value 00/00/2016 00/00/2016
005 Value 5 Value 5 Value 5 Value 00/00/2016 00/00/2016
006 Value 6 Value 6 Value 6 Value 00/00/2016 00/00/2016
007 Value 7 Value 7 Value 7 Value 00/00/2016 00/00/2016
008 Value 8 Value 8 Value 8 Value 00/00/2016 00/00/2016
009 Value 9 Value 9 Value 9 Value 00/00/2016 00/00/2016
010 Value 10 Value 10 Value 10 Value 00/00/2016 00/00/2016
011 Value 11 Value 11 Value 11 Value 00/00/2016 00/00/2016
012 Value 12 Value 12 Value 12 Value 00/00/2016 00/00/2016
013 Value 13 Value 13 Value 13 Value 00/00/2016 00/00/2016


Project Health and Review Module
Search
View Projects
Search
Project Info View
Project Score View
Project Number
Variance
Scope
DSO
Schedule
Quality
Risk Mngmt.
Comm.
Client Satis.
Completion
Risk
Action
001 Value 1 Value 1 Value 1 Value 1 Value 1 Value 1 Value 1 Value 1 Value 1 Value 1
002 Value 2 Value 2 Value 2 Value 2 Value 2 Value 2 Value 2 Value 2 Value 2 Value 2
003 Value 3 Value 3 Value 3 Value 3 Value 3 Value 3 Value 3 Value 3 Value 3 Value 3
004 Value 4 Value 4 Value 4 Value 4 Value 4 Value 4 Value 4 Value 4 Value 4 Value 4
005 Value 5 Value 5 Value 5 Value 5 Value 5 Value 5 Value 5 Value 5 Value 5 Value 5
006 Value 6 Value 6 Value 6 Value 6 Value 6 Value 6 Value 6 Value 6 Value 6 Value 6
007 Value 7 Value 7 Value 7 Value 7 Value 7 Value 7 Value 7 Value 7 Value 7 Value 7
008 Value 8 Value 8 Value 8 Value 8 Value 8 Value 8 Value 8 Value 8 Value 8 Value 8
009 Value 9 Value 9 Value 9 Value 9 Value 9 Value 9 Value 9 Value 9 Value 9 Value 9
010 Value 10 Value 10 Value 10 Value 10 Value 10 Value 10 Value 10 Value 10 Value 10 Value 10
011 Value 11 Value 11 Value 11 Value 11 Value 11 Value 11 Value 11 Value 11 Value 11 Value 11
012 Value 12 Value 12 Value 12 Value 12 Value 12 Value 12 Value 12 Value 12 Value 12 Value 12
013 Value 13 Value 13 Value 13 Value 13 Value 13 Value 13 Value 13 Value 13 Value 13 Value 13


Project Health and Review Module
Search
Return to Project
Project Details
Project Number: 060736
Project Name: WVSTIP
Org. Number: Value
Status: Active
Budget: $212,000
Project Manager: Nate Reck
Project Principal: Tom Saltzer
Project Administrator: Sonja Schultheis
Business Line: Value
Region: Value
4.0
0-5
Current Health
20+
Health Scorecards
ID
Date of Review
Reviewed By
Score
Comments
Action
00
00/00/2016
John Doe
Value
Sample Comment
New Scorecard
Questionnaires
ID
Date of Review
Completed By
Comments
Action
00
00/00/2016
John Doe
Sample Comment


Project Health and Review Module
Search
New Project Review
The Project Review Form works in concert with the Project Health Scorecard. It entails a series of questions intended to guide Principals and Managers toward priority topics of discussion during regular project reviews.
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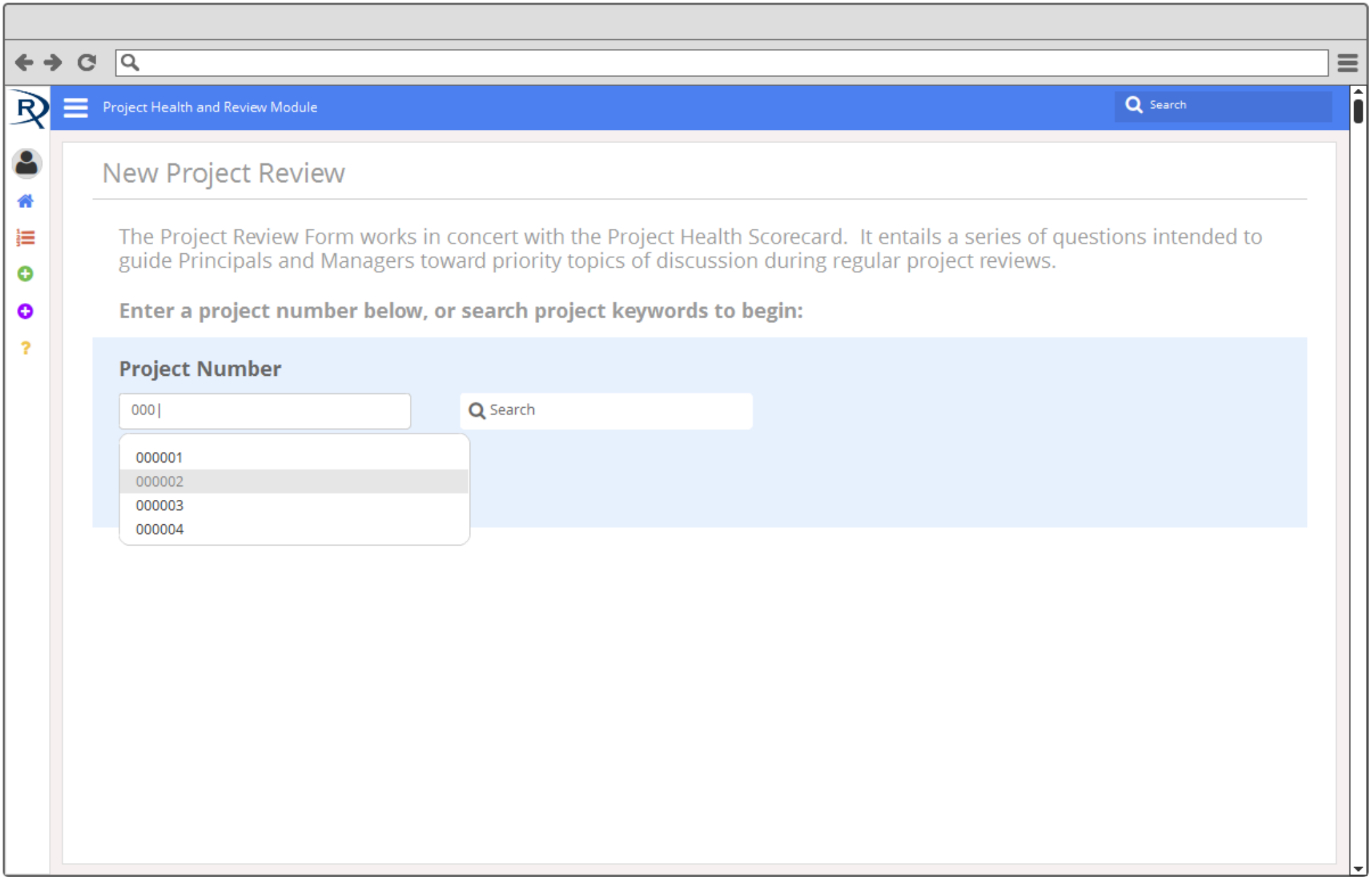
Project Number
Enter Project Number
Search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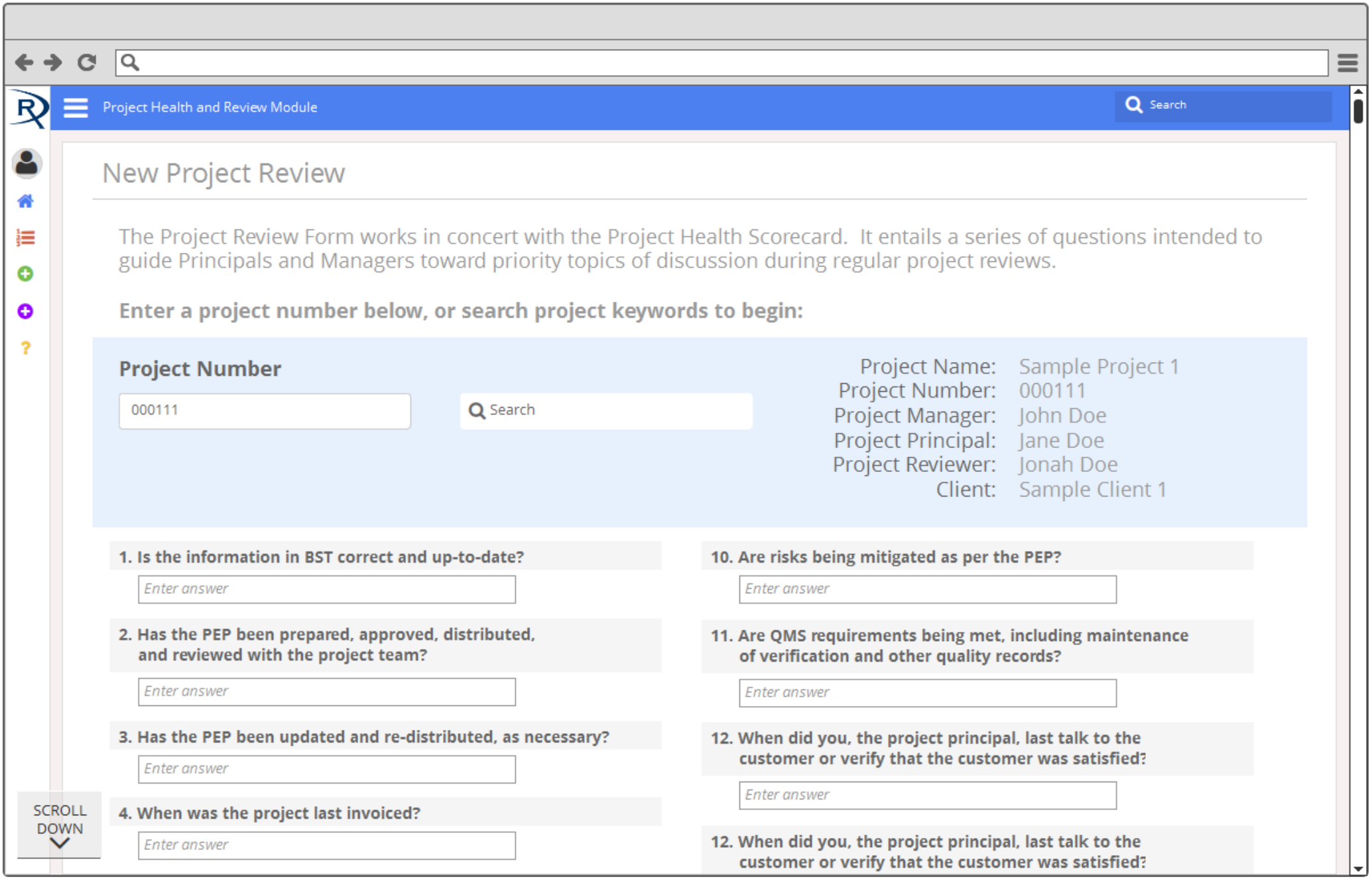
000001
000002
000003
000004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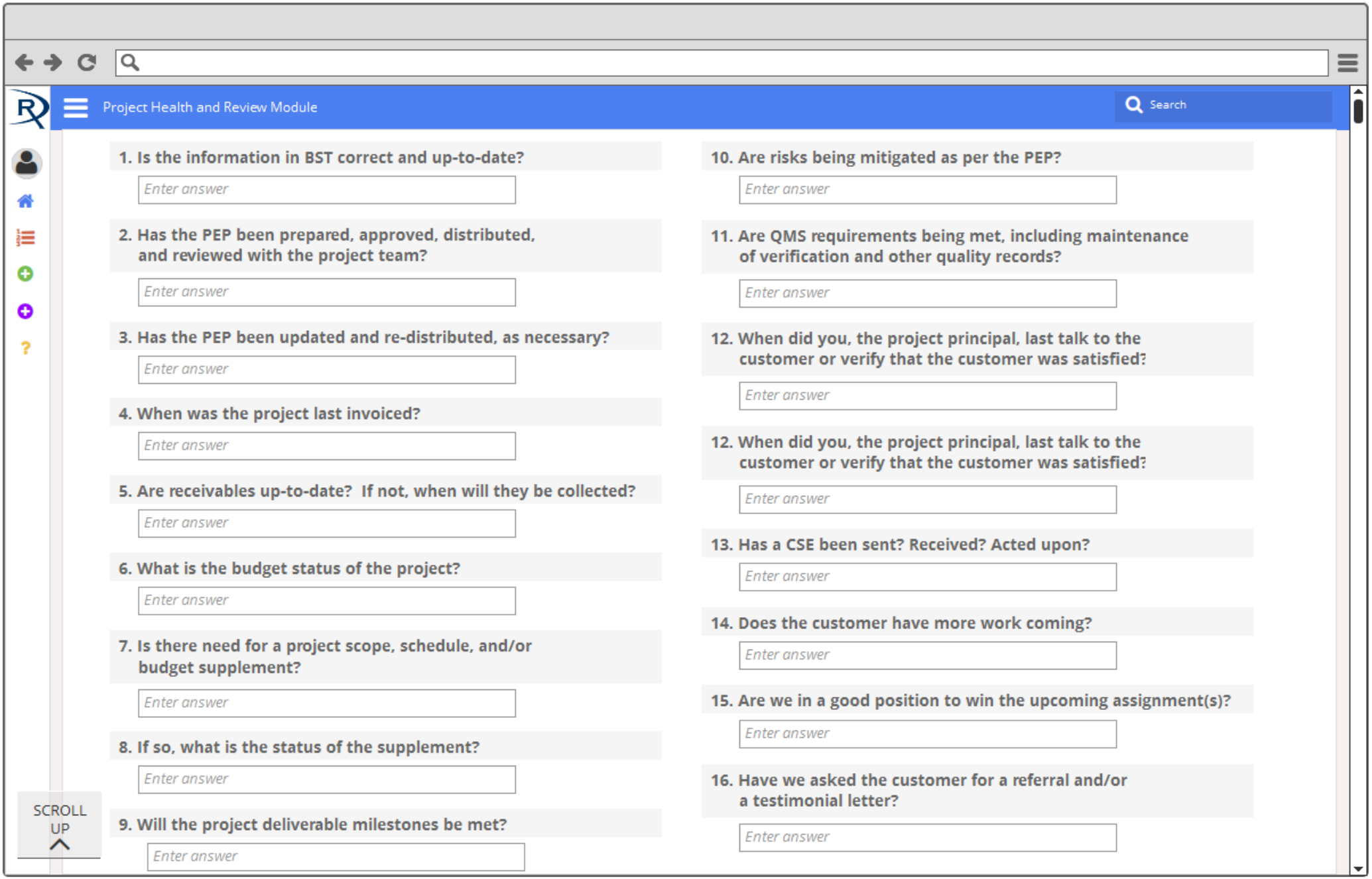
Project Number
000111
Search
Project Name: Sample Project 1
Project Number: 000111
Project Manager: John Doe
Project Principal: Jane Doe
Project Reviewer: Jonah Doe
Client: Sample Client 1
1. Is the information in BST correct and up-to-date?
Enter answer
2. Has the PEP been prepared, approved, distributed, and reviewed with the project team?
Enter answer
3. Has the PEP been updated and re-distributed, as necessary?
Enter answer
4. When was the project last invoiced?
Enter answer
10. Are risks being mitigated as per the PEP?
Enter answer
11. Are QMS requirements being met, including maintenance of verification and other quality records?
Enter answer
12. When did you, the project principal, last talk to the customer or verify that the customer was satisfied?
Enter answer
SCROLL DOWN
12. When did you, the project principal, last talk to the customer or verify that the customer was satisfied?


Project Health and Review Module
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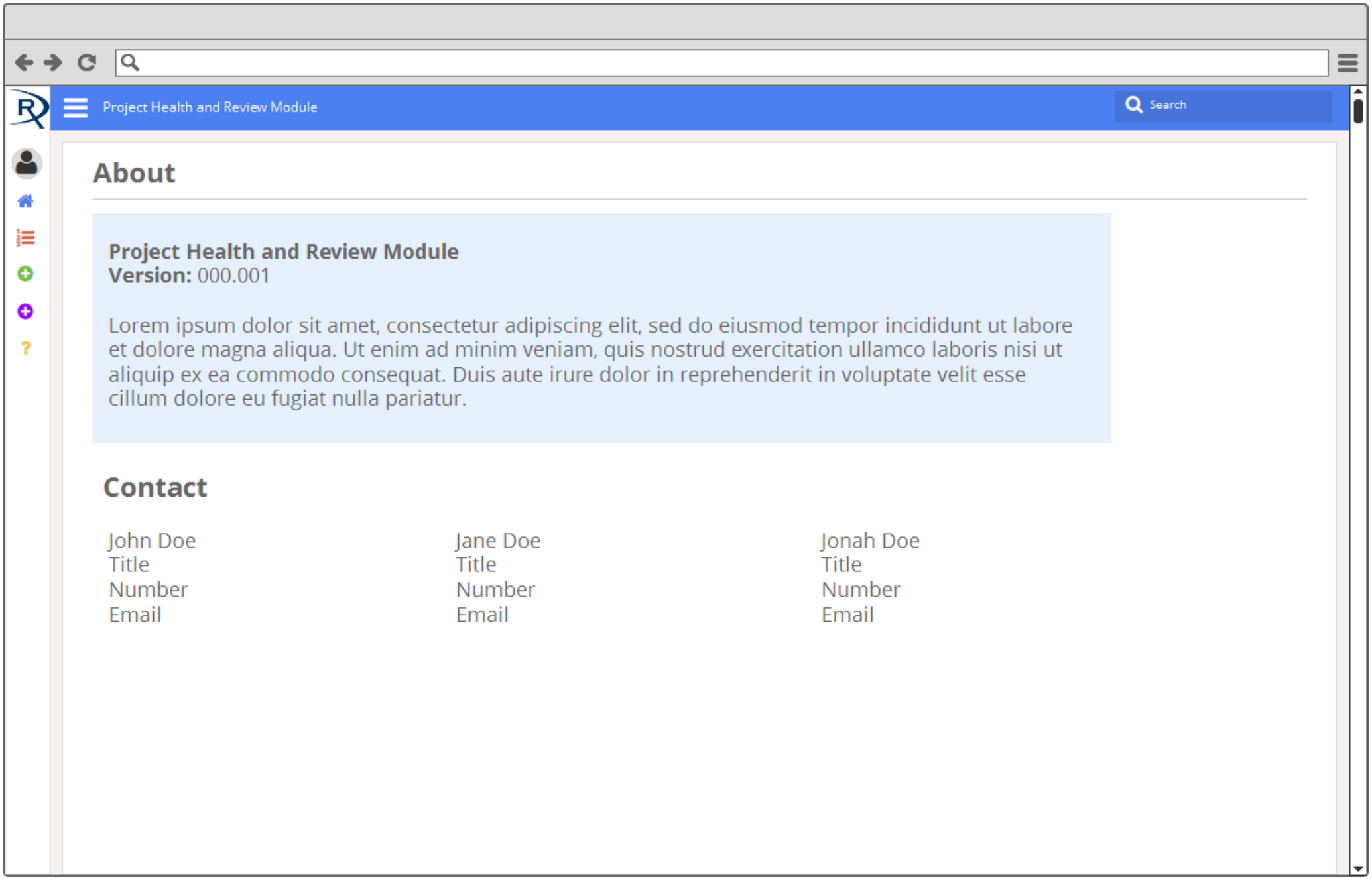
2. Has the PEP been prepared, approved, distributed, and reviewed with the project team?
Enter answer
3. Has the PEP been updated and re-distributed, as necessary?
Enter answer
4. When was the project last invoiced?
Enter answer
5. Are receivables up-to-date? If not, when will they be collected?
Enter answer
6. What is the budget status of the project?
Enter answer
7. Is there need for a project scope, schedule, and/or budget supplement?
Enter answer
8. If so, what is the status of the supplement?
Enter answer
9. Will the project deliverable milestones be met?
Enter answer
10. Are risks being mitigated as per the PEP?
Enter answer
11. Are QMS requirements being met, including maintenance of verification and other quality records?
Enter answer
12. When did you, the project principal, last talk to the customer or verify that the customer was satisfied?
Enter answer
12. When did you, the project principal, last talk to the customer or verify that the customer was satisfied?
Enter answer
13. Has a CSE been sent? Received? Acted upon?
Enter answer
14. Does the customer have more work coming?
Enter answer
15. Are we in a good position to win the upcoming assignment(s)?
Enter answer
16. Have we asked the customer for a referral and/or a testimonial letter?
Enter answer
SCROLL UP


Project Health and Review Module
Search
About
Project Health and Review Module
Version: 000.001
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