



## PO Audit – the Project Data Health Check Tool

### Table Discussion Led by Jacqueline Wild

Jacqueline has had over 10 years experience in PMO Analyst and Consultant roles. She currently works as the IT PMO Manager at AXA PPP healthcare in Tunbridge Wells.

The discussion will cover the value of a health check tool in improving project management data quality.



Presentation slides accompanying this session are also available on the website

The Project Health Check tool (known as the PO Audit) is used within the IT PMO at AXA. Clarity, the collaboration tool is also used, primarily in IT, to capture all the projects running at any one time. Everyone working on projects in IT uses it – from programme and portfolio managers through to project teams. The PMO is responsible for taking the information from Clarity and presenting information as reports to the various audiences. Clarity tends to be a purely internal tool within the IT department, though areas of Business change are taking an increased interest in using Clarity as Programme and Portfolio Management increases in maturity.

The delegates on the session were very interested in how AXA have used Clarity and a number of questions were raised like how many projects are in it (approx 60); what was used before Clarity (a very simple basic tool); are the project managers all working within the



same methodology and processes (yes); how does Clarity deal with programmes (yes Clarity has a hierarchy structure which allows you to roll up to programme level. Clarity is also a configuration management tool and is where all the project documentation is stored.

Clarity data is extracted into the PO Audit Tool which was developed in-house.

View Slide 3 – The tool is fronted with a dashboard that allows a highlighted view of the current issues. Reports that pull their data from Clarity are sent to senior managers therefore accuracy of data is important. The PMO have found that the number of project data quality issues have been driven down due to the flagging nature of the PO Audit tool. There has to be strong working relationships between the PMO and Project Managers in order for a tool like this to be successful. This tool provides the “human interaction” and sense checking that is needed rather than just relying on the data that Clarity provides. The tool also highlights missing or inaccurate data (most of the time the PMO has a gut feeling about the health of a project, particularly where they are close to the project).

Interesting question about whether tools like this allow the PMO to become more streamlined i.e., you need less PMO resource when tools like this have been implemented. In AXA PPP's case, the PMO resource numbers have increased (nine currently work in the PMO) because tools like this allow them to move on to work at a higher level by adding services or processes that add more value.

Slide 4 – Part of the PMO Analyst role is about validating the data and information. The work done has meant that senior management value the information that comes out of Clarity and use it to inform decisions.

The tool is run every week and it takes about an hour to run (takes a cut of live data from Clarity at a point in time). The validation of the data is an ongoing process however reports do need to be created on a weekly basis for issue to the senior management.

Slide 5 - The tool is MS Excel based which allows easy filtering, and drill down for details. The tool is colour coded (uses RAG) to indicate how long each issue has been outstanding. (Note: this is quite different from the project status RAG).

There was a quick discussion about the creation of the PO Audit tool in the first place. Continuous process improvement is actively encouraged at AXA PPP and each member of the PMO has ongoing responsibilities (about a day a week) for project work around process improvements. The creation of the tool was viewed as a mini project by a member of the PMO. The creation took place over a period of time with the PMO member spending some of their process improvement allocation developing it. It was recognised that some PMOs may not have this luxury depending on the remit, size or the maturity of the PMO.

Another example of a process improvement implemented by the PMO to improve project delivery (Commence Next Stage) was discussed. The project manager uses data from Clarity to create the Commence Next Stage report which enables the decision over whether a project can move into the next stage. This includes a review of whether business benefits are still valid.

A question was raised about how the PO Audit tool can be used in a programme and portfolio view. If projects were highlighted with a Red in some areas, is there is



interdependency view of how this affects other projects within the programme and further to portfolio. It was clarified that the RAG in the PO Audit is very different from the project status RAG. The PO Audit Tool simply looks at project management data quality and not the delivery status of projects, programmes or portfolios. Clarity does however enable project status reporting at programme or portfolio level.