

*The AXA PPP healthcare Project Data 'Health Check' Tool*

- > The discussion will cover how the AXA PPP data 'health check' tool helps us manage and improve the quality of our project management data*
- > You should gain a good understanding of the value that a similar 'health check' tool could bring to your organisation*

# Where Project Data is Stored & How it is Used

## ■ Where is our Project Data Stored?

- Project Repository (Clarity)
  - Central source of information for our entire portfolio of projects
    - Our single source of truth
  - Real time data
    - Changes are made directly in Clarity or Open Workbench (scheduling tool)
- Financial tables (Access Databases)
  - Project budget master maintained by the Business

## ■ How is the Project Data Used?

- Used for Management Information (MI) and Reporting
  - Information exported into our reporting and management dashboards
    - Weekly reporting, Commence Next Stage Reports, Project Board Reports, Senior Management meetings etc.
  - Informs project decisions at a senior level
    - Senior Management Team trust the integrity of the data

# What the PO Audit Tool does & How it adds Value

## ■ What does the tool do for us?

- Ensures the COMPLETENESS of our project data
  - Presence check to confirm whether the data is available
- Validates that the data is CONSISTENT
  - Validation rules applied to check that the data conforms to certain acceptance criteria
- Ensures the ACCURACY & TIMELINESS of our project data
  - Checks that the data is correct and current

## ■ How does the tool add value?

- Ensures a true representation of our projects
  - Accurate reporting
    - Enables a factual approach to decision making
- Saves time & effort
  - Reduces PMO time and energy investment in data validation
    - The tool extracts information and uses macros to automatically interrogate the data
    - Flags issues of missing or inaccurate data enabling the PMO to raise / address these in a timely fashion
    - Drives other reports e.g. Status Change Report
  - Saves our PMs time
    - PMs value the time that the tool saves them. It allows them to focus on their job of project delivery!

*‘PO Audit tool is used to validate that the information being used to inform decisions is complete and accurate’*

**redefining** / standards



# The role of the PMO in Project Data Quality

## ■ Project Data Governance

- Integral part of our PMO Analyst role
  - Ensure discrepancies are flagged and corrective actions are communicated and tracked
    - Validate key data changes (e.g. changes to previous weeks data flagged)
  - Valued by Senior Management
    - Seen as the custodian of the 'single version of (the) truth'

*'PO Audit tool is a key enabler for the PMO'*

## ■ Responsible for updating the PO Audit

- Data is imported weekly, immediately prior to our weekly report run
  - Data for our reporting is as current as it can be
    - Much of our regular reporting and MI is run off of the PO Audit
- The tool is constantly evolving to ensure that we look at data that is relevant to now
  - Suggestions and Exclusions log

# What does the PO Audit tool look like?

## ■ Excel spreadsheet

- Easy access via Dashboard / Control Sheet (see Appendix)
  - Filters allow for easy filtering and viewing of data quality issues
    - Filters by Programme or PMO
  - Enables drill down into different data categories
  - Number indicates the total data quality issues in this area
  - RAG used to indicate how long there has been an issue
    - Green No issues
    - Amber > 1 week
    - Red > 1 month
    - No RAG = For information
  - Useful tool for PMO Manager to identify areas of weakness
    - PMs can access it if they wish (saved in shared area)

# Appendix A – Rolled up dashboard

## Health PO Audit

Data correct as of 12/09/2011 14:18:12

Programme: All | Filter | Project Office Contact: All

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SHOW Populated Reports

Project Set-Up Tabs | Show Exec Summary Reports | Project Closure Tabs

Maintenance Tabs | Show Comparison Reports | Finance Tabs

HIDE All Reports

Show Dashboard | PO Audit Dashboard | Hide Dashboard

### Set-Up Overview

Report Tab	L B	J W	N A	M T	A G	M L	T V	S D	B S	Other	Total
Data Quality Issues	3			14							Total

### Maintenance Overview

Report Tab	L B	J W	N A	M T	A G	M L	T V	S D	B S	Other	Total
Data Quality Issues	2			11							Total

### Closure Overview

Report Tab	L B	J W	N A	M T	A G	M L	T V	S D	B S	Other	Total
Data Quality Issues											Total

### Finance Overview

Report Tab	L B	J W	N A	M T	A G	M L	T V	S D	B S	Other	Total
Data Quality Issues	2			4							Total



# Appendix B – Expanded dashboard



## PO Audit Dashboard



### Project Set-Up Data Quality

Report Tab	LB	JW	NA	MT	AG	ML	TV	SD	BS	Other	Total
Background											
Project Sponsor	1			1							2
Project Type											
Financial	2			10							12
Dev. Approach				1							1
Descriptions				2							2
Data Quality Issues	3			14							Total

### Project Maintenance Data Quality

Report Tab	LB	JW	NA	MT	AG	ML	TV	SD	BS	Other	Total
Stage Compare											
Baseline											
End Date	2			10							12
Missing Gates				1							1
Proceed Milestone											
Past Milestones											
Gate Actions											
Suspended Projects											
Data Quality Issues	2			11							Total

### Closure Overview

Report Tab	LB	JW	NA	MT	AG	ML	TV	SD	BS	Other	Total
Status											
Time Recording											
Zero ETC											
Data Quality Issues											Total

### Project Finance Data Quality

Report Tab	LB	JW	NA	MT	AG	ML	TV	SD	BS	Other	Total
ID Code											
Approved Budget	2			4							6
Data Quality Issues	2			4							Total

### Information Only

Report Tab	LB	JW	NA	MT	AG	ML	TV	SD	BS	Other	Total
Resource Allocation											
NonFlag Priority											
PO Contact											
Status Change										1	1
Delivery Complete											
Data Quality Issues										1	Total



# Appendix C – Data drill down

## PO Audit End Date

Data correct as of: 12/09/2011

### What does it show?:

This report will highlight where a projects Gate 5 or Project Finish date is in the past or blank (Highlighted Yellow)

This report will also highlight where a project finish date, and Gate 5 do not match (Thick dark blue border around culprits)

### Action:

Check with the PM as to whether the Gate date is still correct, If it isn't, the schedule needs amending by the PM in Open Workbench

If the Gate date is correct, the project needs completing in Clarity by following the project closedown procedure

PO Contact	Area	Project Name	Project Manager	Entity Type	Status	Gate 1	Gate 2	Gate 3	Gate 4	Gate 5	Project Finish Date
L B	I	2636a	Bolland, Jonathan	Project	In Flight	22/06/2007	29/11/2007	29/02/2008	24/04/2009	24/04/2012	22/05/2012
L B	I	2655a	Rawlinson, Kay	Project	In Flight	01/01/2007	02/02/2007	26/03/2007	31/07/2009	22/12/2011	23/12/2011

## PO Audit Missing Gate Dates

Data correct as of: 12/09/2011

### What does it show?:

This report shows where any gate dates are missing from the schedule, is not named correctly, or is not ticked as a key task.

### Action:

There are a number of causes for issues in this report:

The gate date is not in the schedule, the PM needs to be advised and to enter the gate date (or an approx date if just starting out the project) in Open Workbench

The gate date needs to be ticked as a 'Key Task' in Open Workbench

The gate date needs to be selected as a 'Milestone', and not a 'Task', 'Activity' etc in Open Workbench

The gate date needs to have the words (Gate x) (with x symbolising the gate number).

If multiple stages have the same gate date (i.e. Int Waterfall), then the gate date should read (Gate x, Gate y)

If a project is cancelled, it's Gate 5 date should equal the Project Completion date (the date the project was cancelled, if it isn't, amend in Open Workbench

Approved/Withdrawn projects should not have any gates ticked as 'Key Tasks', these can be amended by un ticking in Open Workbench

PO Contact	Area	Project Name	Project Manager	Entity Type	Status	Stage	Gate 1	Gate 2	Gate 3	Gate 4	Gate 5	Date Added
M T	Com	2623a	Williams, Tara	Project	In Flight		15/10/2011					06/09/2011

redefining / standards



## Questions / Discussion

**redefining** / standards

