Project & Program Control
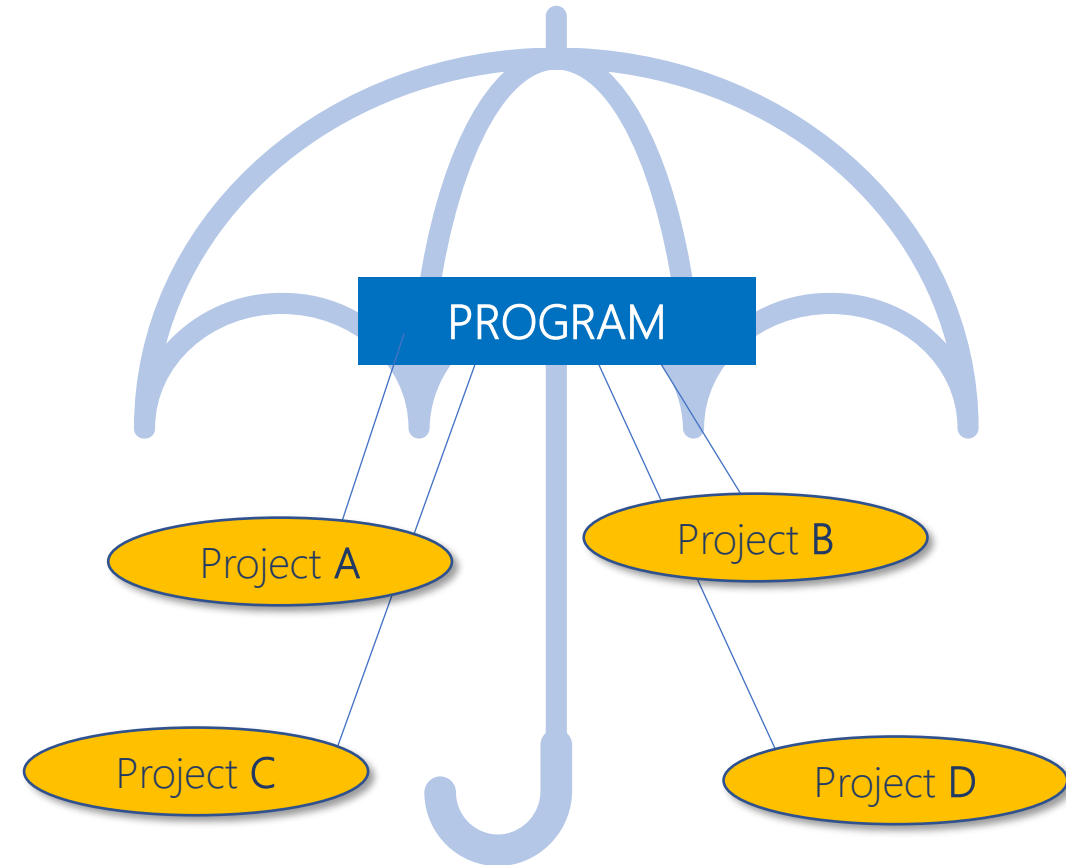
A public-sector use case leveraging
Microsoft Power BI, SharePoint *and*
Microsoft Teams
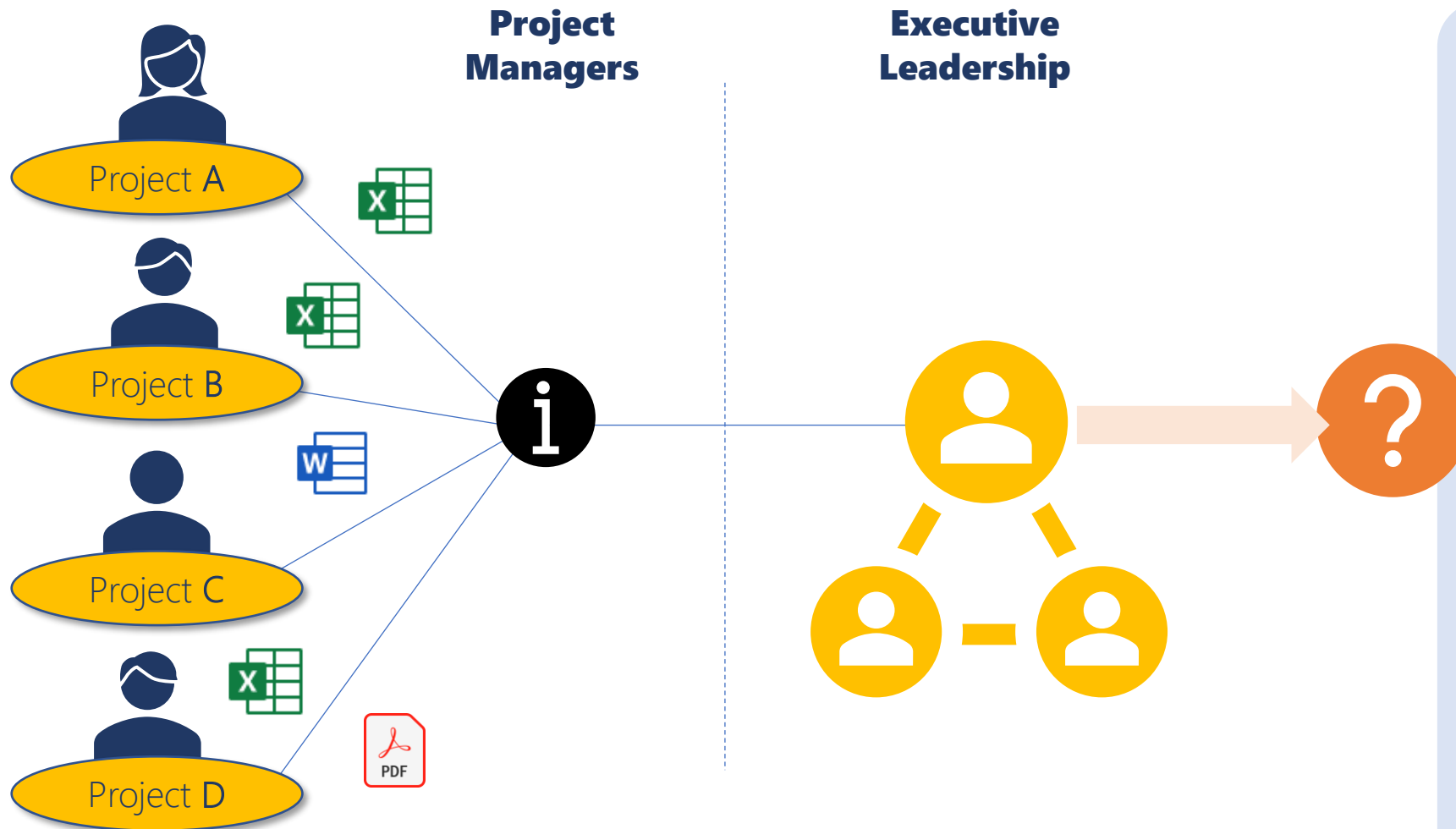
Presented by Kiefer Consulting

Public Sector Project Management

- Most departments across state and local government are managing a portfolio of **projects**
- It is common for the projects to be a part of a larger **program**

Project & Program Reporting

Project Managers

Executive Leadership

Project A

Project B

Project C

Project D

Challenges:
- Varying formats
- Inconsistency in reporting
- No dashboard to evaluate the overall health of projects and program (scope, schedule, budget)

Gold
Microsoft
Partner

Solving the Problem

*Kiefer leveraged several Microsoft 365 applications to build a solution for **project and program reporting**.*

What questions do you want to *easily* answer?

- Budget (on budget / over budget)
- Milestones
- Issues / Risks
- Projects by Project Manager

- *Standardize reporting*
- *Single-source-of-truth*
- *Ensure data quality*

- *Project and program reporting and dashboards*

- *Dashboard available in Microsoft Teams*
- *Collaboration platform and allows teams to pull up dashboards within the application*
- *Integration with SharePoint Lists for data collection in Teams*

11/3/2021

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About this Demo:

This is a **demonstration** project reporting dashboard.

This demo was built to highlight the capabilities of the solution without exposing actual client data.

This demo is based on an actual solution we implemented for a client.

Kiefer has delivered project and program reporting solutions for several SLG clients

Portfolio/Program View Highlights

XYZ INC Portfolio

Project Type
- ☐ Facility Modifications
- ☐ Maintenance and Repair
- ☐ New Construction
- ☐ Renovation

Project Status
- ☑ 01 - Active
- ☐ 02 - On Hold

Project Manager
- ☐ Jane Doe
- ☐ John Doe

County
- ☐ Los Angeles
- ☐ Placer
- ☐ Sacramento
- ☐ Sonoma

Project
- ☐ 121-001 - Sonoma Restoration
- ☐ 121-002 - LA Maintenance
- ☐ 211-002 - Strawberry Creek
- ☐ 355-001 - Boulder Transit
- ☐ 355-001 - Ponderosa Site

Client Name

Filter by specific criteria

At-a-Glance

Executive Summary

5	$3.34M	$1.83M	$140K	2	(Blank)
Projects	Current Budget	Expended	Budget vs Forecast	High Impact Risks	Upcoming Milestones

Projects on Budget

Title	Current Budget	Expended	Budget vs Forecast
121-001 - Sonoma Restoration	$1,075,000	$470,000	$155,000 🟢
121-002 - LA Maintenance	$675,000	$445,000	$30,000 🟢
211-002 - Strawberry Creek	$785,000	$425,000	$65,000 🟢
355-001 - Ponderosa Site	$260,000	$90,000	$60,000 🟢
Total	**$2,795,000**	**$1,430,000**	**$310,000**

Projects off Budget

Title	Current Budget	Expended	Budget vs Forecast
355-001 - Boulder Transit	$545,000	$400,000	($170,000) 🔶
Total	**$545,000**	**$400,000**	**($170,000)**

High Impact Risks

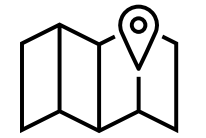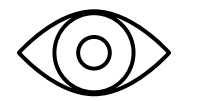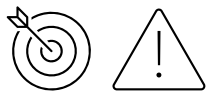| Project	Risk	Date Identified	Description
121-001 - Sonoma Restoration	COVID-19 Schedule Delay	3/15/2020	Potential schedule delays due to COVID-19 pandemic
211-002 - Strawberry Creek	Earthquake	9/13/2020	Currently being assessed, damage unknown.

Upcoming Milestones (Next 90 Days)

Project	Milestone	Planned	Actual / Forecast

Keys to Success: Power BI

Don't overengineer

Timing and engagement is important to dashboard accuracy

Deliver actionable insights quickly

Feedback on today's presentation or to learn more.
Contact Brian Wallace
bwallace@kieferconsulting.com