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MetaPM Case Study

Portfolio Performance Reporting Dashboard – Utility

The Challenge

The Finance Group PMO engaged MetaPM to develop a portfolio performance reporting dashboard supported by the documented process and procedures.

Working closely with project team, our aim was to identify key lessons learnt in the project and recommend options to address common delivery challenges.

MetaPM's Approach

MetaPM utilised a proprietary lessons learnt review framework with focus on the qualitative and quantitative findings. MetaPM used a collaborative approach to maximise buy-in and commitment to the recommendations from the whole project team that included the following steps:

- Understand an organisational and project environment
- Identify and engage key project stakeholders
- Review key project artefacts against the agreed project control requirements
- Identify and communicate the key lessons learnt and the causes, and provide recommendations for improvement
- Obtain actions for the identified issues and
- Issue a Lessons Learnt Report

A business benefits review was performed in parallel with the lessons learnt review. The objective of business benefits review was to confirm:

- All the envisaged business benefits are adequately defined, their business value and impact have been quantitatively measured and communicated to business users, ITS, researchers and wider University community; and
- Some of the envisaged business benefits have been already realised and/or the process/mechanism is in place to ensure these will be realised once the project delivers its final products.

The Results

- The Lessons Learnt Review focused on capturing key learning's in both the organisational and project context, and the final report was objective and delivered constructive feedback;
- The output was "action-oriented" – recommendations are developed with a clear focus on achieving both short and long-term results; and
- The Benefits Summary Presentation was co-developed with the Client, including a list of agreed and verified business benefits with captured relevant business



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value/impact measures, where applicable and/or available, and the benefits alignment to the organisation's strategic objectives.

The Lessons Learnt and Benefits Reviews were well received by all stakeholders.

The Client provided positive feedback on the outcome of the audit. Project Lessons Learnt Improvement actions have been agreed and identified business benefits were outlined in the business benefits realisation plan.