



The Executive Dashboard

Tell them what they need to know...
then STOP!

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Bringing a vast array of PMO consulting, training, and capability building solutions to organizations eager to create sustainable change since 1999

Non Profit Service

- ❖ Executive Director, Project Management Day of Service (PMDoS)
- ❖ Founder, Project Management for Change (nonprofit)
- ❖ Board Member - VP, Marketing, PMI Washington, DC (1.5 years)
- ❖ Former Board Member PMI Montgomery County, MD (10 years)
- ❖ Board Member Goodwill Industries of the Greater Chesapeake, Inc. (3 years)

Certifications

- ❖ PMI PMP® certification (11 years)
- ❖ Prosci Change Management Practitioner certification
- ❖ Computer Science Degree from Virginia Tech



Typical Status Meeting

Sound familiar?

Management is drilling down into some obscure or irrelevant details in your report



Meeting Failure!

Expected outcomes not achieved...

Meeting is over and you did not get to:

- Overall status
- Decisions needed
- Problems solved

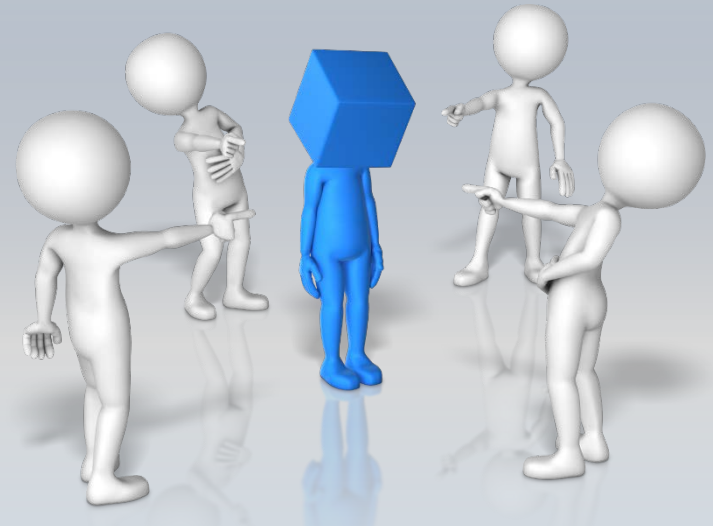


What Happened??

No one to blame but yourself...

You gave them the
information they needed
and then didn't...

STOP!



It's All About Focus

*Tell them what they NEED to know
to make educated and informed decisions...
then STOP!*

- Give them Who, What, When, Where, Why, and How
 - **Who:** Issue/risk owners, task owners
 - **What:** Work taking place or accomplished, things you need them to do
 - **When:** Expected and actual completions, projected dates
 - **Where:** Issues are occurring, work is happening, problems are likely
 - **Why:** Explanation for off track, changes, and decisions
 - **How:** Work is getting done, project will get back on track
- Management is busy!!
 - Keep it short, clear and FOCUSED
 - Tell them what's going on and what you want them to do



Summary

Deliverables and Milestones

❖ Decision and Outcome

Deliverable/Milestone	Status	% Comp	Original Delivery Date	Current Delivery Date	Comments
	◆				

➤ Item and Action

Issues and Risks

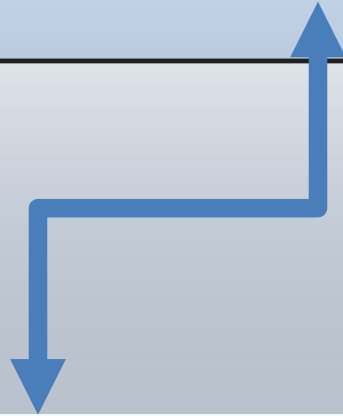
✓ Activity and Benefit

Issue/Risk Description	Status	Owner	Comments
	◆		

☐ Activity and Expected Result

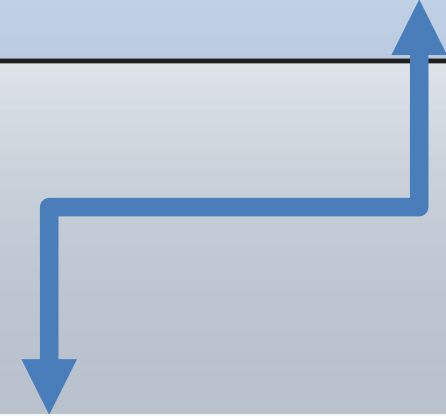
Budget





Make it a living document, filling it out as you have updates

Submit at week end before the weekend comes and you forget everything!



BRAG Status

Blank: Until through planning and project baseline has occurred

Black: Once project is closed

Green: On track with planned

Amber: Off track from planned, but efforts underway to resolve with likelihood to return to green

Red: Issues taking project off planned path – will not meet original target

Summary
Key Decisions Made
❖ Decision and Outcome
Items Requiring Management Attention
➤ Item and Action
Activities Accomplished This Reporting Period
✓ Activity and Benefit
Planned Activities for Next Reporting Period
☐ Activity and Expected Result

The left half of the dashboard...

- Should get to the point
- Lets you tell the story in words
- Is intentionally small so you can focus yourself and the reader

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Summary:

Provide a simple bottom line up front (BLUF) status that can stand alone to describe the project status

Do

- Use this as your 2-3 sentence "elevator pitch"

Don't

- Repeat content available in rest of report

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Key Decisions Made:

Focus on a summary of decision and outcomes as a result of the decision

Do

- Include outcome impacts of that decision and why decision made

Don't

- Get into finger pointing
- Leave it open-ended

Use a unique symbol to indicate decisions

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Items Requiring Management Attention:

This is where you identify support you need from management

Do

- USE THIS to manage up
- Be smart about focusing your leaders
- Include issue, impact and what you need management to do
- Be prepared to provide supporting information
- Expect this to be where you spend time in the meeting

Use an arrow or pointer symbol to attract eyes to the text in this box

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Activities Accomplished:

Highlights of what got done

Do

- Focus only on highlights
- Include the benefit of the activity performed

Don't

- Include irrelevant details or distracting information – this is not a running list of every thing you did all reporting period

Checkmark symbol tells the brain that something was accomplished

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Planned Activities:

Highlights of what you intend to get done

Do

- Focus only on highlights
- Explain expected results and outcomes when work accomplished

Don't

- Panic if items end up staying on this list for more than one reporting period

Box tells reader that something needs to be 'checked off' - that it is not yet accomplished

The right half of the dashboard...

- Should cover major data points/metrics to give a holistic view
- Gives you a chance to tell the story in numbers

Deliverables and Milestones

Deliverable/Milestone	Status	% Comp	Original Delivery Date	Current Delivery Date	Comments
	◆				

Issues and Risks

Issue/Risk Description	Status	Owner	Comments
	◆		

Budget

Budget Item	Status	Approved Budget	Current Spend	Expected Spend	Comments
	\$				

Deliverables and Milestones:

Major points of progress for project

Leverage color to indicate status

Track % complete of deliverable/ milestone, can include column for expected % complete

Show planned vs. actual on any fields where the metric is needed

If white, progress toward baseline

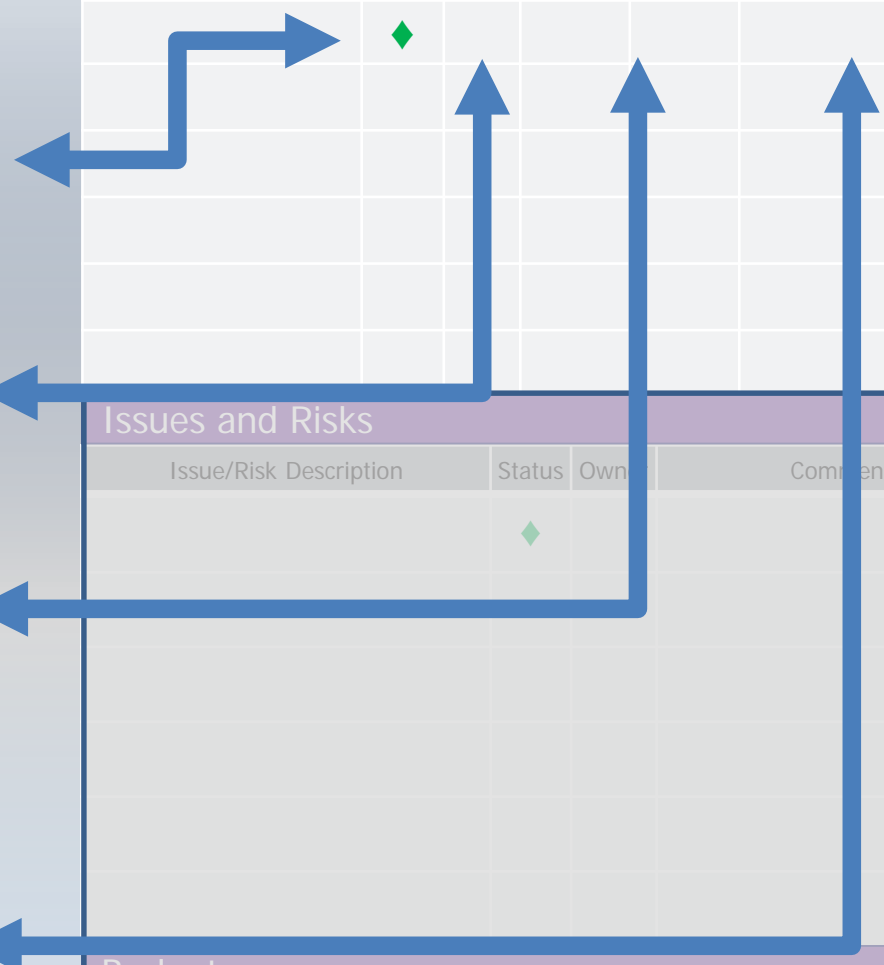
If green, how it is progressing or how it got back there

If amber or red, what you are doing to return deliverable to green status

Deliverables and Milestones					
Deliverable/Milestone	Status	% Comp	Original Delivery Date	Current Delivery Date	Comments
	◆				

Issues and Risks			
Issue/Risk Description	Status	Own	Comments
	◆		

Budget					
Budget Item	Status	Approved Budget	Current Spend	Expected Spend	Comments
	\$				



Issues and Risks:

Highest level items you want management to understand and support

Do

- Make sure to use this as a way to explain what “could happen” so management is not blindsided
- Risks will turn to issues here – make sure risks (if known) started as issues on this report

Always identify an owner that is responsible for resolving issue and reporting status

Deliverables and Milestones

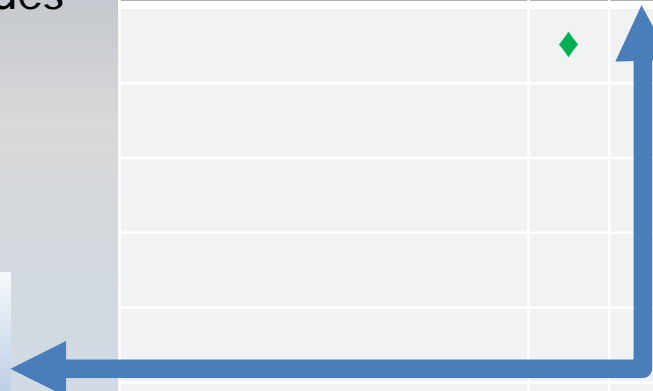
Deliverable/Milestone	Status	% Comp	Original Delivery Date	Current Delivery Date	Comments
	◆				

Issues and Risks

Issue/Risk Description	Status	Owner	Comments
	◆		

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Budget Item	Status	Approved Budget	Current Spend	Expected Spend	Comments
	\$				



Budget (or other financial metrics):

Summary project financial information

Do

- Be honest and current
- Use this to highlight needs
- Leverage color (red/black)

Red: Spend is/planned to be greater than approved budget

Approved: What leadership approved for that budget item

Current Spend: What you have actually spent to date

Expected Spend: What you forecast you will spend at completion

Deliverables and Milestones

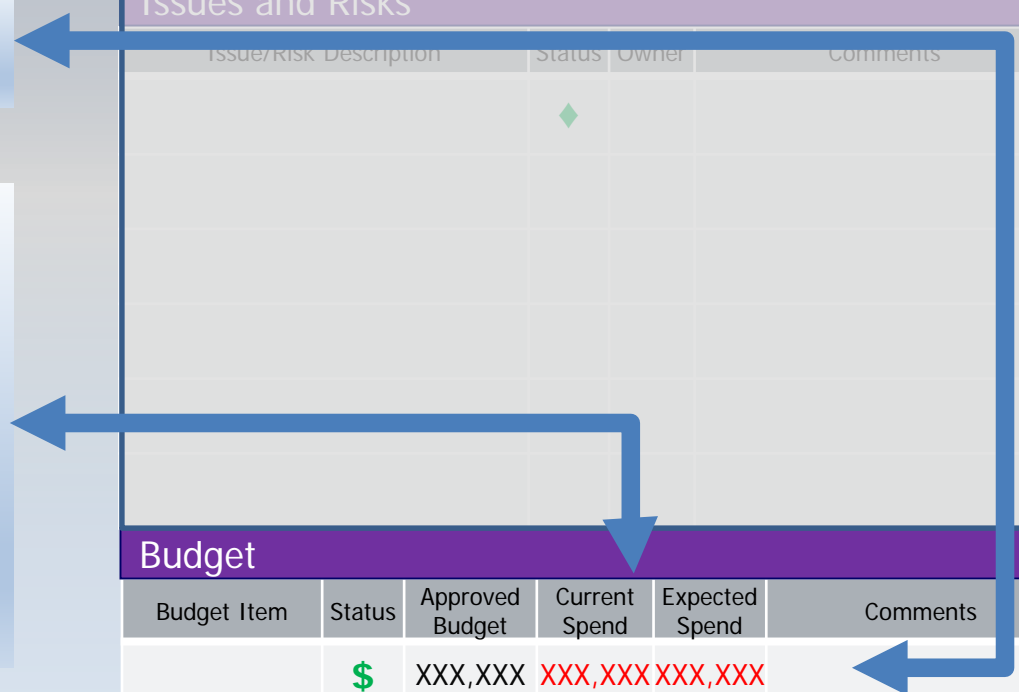
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	\$	XXX,XXX	XXX,XXX	XXX,XXX	



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✓ Activity and Benefit

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Budget



Summary

Chapter initiative projects are starting to progress. First quarter focus was on sponsorship for Region 5, defining the position descriptions and makeup of the Marketing team, and learning about all existing marketing and sponsorship programs, as well as reaching out to all other VPs to collect marketing team needs or requirements.

Key Decisions Made

- ❖ Focus on R5 sponsorships, learning the marketing space and existing programs, and building out job descriptions and recruiting for marketing team.
- ❖ Second quarter focus is on engaging sponsors, redefining sponsorship programs, and recruiting sponsors for the PM Symposium, as well as, recruiting volunteers for the marketing team.

Items Requiring Management Attention

- Low volunteer applications (3) - recruited some of our own volunteers via other channels – need support from volunteer recruiting to reach out to existing pool of volunteers or projects on dashboard could be delayed.

Activities Accomplished This Reporting Period

- ✓ Created marketing team job descriptions & published positions
- ✓ Reviewed current sponsorship packages & designed new sponsorship programs (including symposium sponsorship packages)
- ✓ Published marketing team newsletter
- ✓ Held sponsorship breakfast forum to solicit feedback from sponsors

Planned Activities for Next Reporting Period

- Correct/update sponsorship database; categorize sponsors by interest areas. – A lot of bad data was in the database.
- Update sponsorship programs to better suit sponsor needs.
- Fill some of the marketing positions based on applicants.
- Recruit sponsors for the symposium and chapter overall.
- Define requirements for smartphone app.
- Create/share update with ops board on marketing programs.

Projects

Project	Status	% Comp	Original Delivery Date	Current Delivery Date	Comments
Support R5 Sponsorships	◆	100%	By event	By event	Helped secure sponsors for the event, although engaged late.
Build Marketing Strategy	◆	50%	5/31/15		Projects defined, but overall strategy still coming together.
Build Marketing Team	◆	10%	6/30/15		Phase 1 expected to complete in June. Actively interviewing.
Symposium Sponsorships/Marketing	◆	20%	9/1/15		Sponsor packages defined/posted. Defining brand/market strategy. Recruiting volunteer. Rebranding website.
Sponsor Newsletter	◆		5/30/15		Create and send a monthly newsletter to sponsors to tell them about our new programs, remind them of upcoming events, deadlines, etc.
Smartphone App (Uji from Tech)	◆	5%			Convening team to start reviewing requirements. Slow responses from Tech. Have two vendors under consideration.
LinkedIn Networking (Cholette from Net)	◆				Setting up planning team and looking at options.
Social Media Plan (Internal)	◆				Recruiting volunteer to own requirements/design/planning. Also need to recruit volunteers to do regular blasts.
Media (Branding/Communications) Plan (Kal from Vol)	◆				Setting up planning team.
Branding/Pricing/Marketing Strategy for Webinars (Davin/Lance)	◆		6/30/15		Plan to work on this during May/June as results of inventory complete.
Executive Roundtable Support	◆				

Budget

Category	Status	Approved	Current	Expected	Comments
Revenue	\$	\$102,400			
Expense		\$22,116			
Total		\$80,284			

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PMIWDC Marketing Status Report for April 2015: Overview

Overall Status

Summary	Projects					
<p>Chapter initiative projects are starting to progress. First quarter focus was on sponsorship for Region 5, defining the position descriptions and makeup of the Marketing team, and learning about all existing marketing and sponsorship programs, as well as reaching out to all other VPs to collect marketing team needs or requirements.</p>	Project	Status	% Comp	Original Delivery Date	Current Delivery Date	Comments
<p>Key Decisions Made</p> <ul style="list-style-type: none"> ❖ Focus on R5 sponsorships, learning the marketing space and existing programs, and building out job descriptions and recruiting for marketing team. ❖ Second quarter focus is on engaging sponsors, redefining sponsorship programs, and recruiting sponsors for the PM Symposium, as well as, recruiting volunteers for the marketing team. 	Support R5 Sponsorships	◆	100%	By event	By event	Helped secure sponsors for the event, although engaged late.
<p>Items Requiring Management Attention</p> <ul style="list-style-type: none"> ➤ Low volunteer applications (3) - recruited some of our own volunteers via other channels – need support from volunteer recruiting to reach out to existing pool of volunteers or projects on dashboard could be delayed. 	Build Marketing Strategy	◆	50%	5/31/15		Projects defined, but overall strategy still coming together.
<p>Activities Accomplished This Reporting Period</p> <ul style="list-style-type: none"> ✓ Created marketing team job descriptions & published positions ✓ Reviewed current sponsorship packages & designed new sponsorship programs (including symposium sponsorship packages) ✓ Published marketing team newsletter ✓ Held sponsorship breakfast forum to solicit feedback from sponsors 	Build Marketing Team	◆	10%	6/30/15		Phase 1 expected to complete in June. Actively interviewing.
<p>Planned Activities for Next Reporting Period</p> <ul style="list-style-type: none"> ❑ Correct/update sponsorship database; categorize sponsors by interest areas. – A lot of bad data was in the database. ❑ Update sponsorship programs to better suit sponsor needs. ❑ Fill some of the marketing positions based on applicants. ❑ Recruit sponsors for the symposium and chapter overall. ❑ Define requirements for smartphone app. ❑ Create/share update with ops board on marketing programs. 	Symposium Sponsorships/ Marketing	◆	20%	9/1/15		Sponsor packages defined/posted. Defining brand/market strategy. Recruiting volunteer. Rebranding website.
	Sponsor Newsletter	◆		5/30/15		Create and send a monthly newsletter to sponsors to tell them about our new programs, remind them of upcoming events, deadlines, etc.
	Smartphone App (Uji from Tech)	◆	5%			Convening team to start reviewing requirements. Slow responses from Tech. Have two vendors under consideration.
	LinkedIn Networking (Cholette: Net)	◆				Setting up planning team and looking at options.
	Social Media Plan (Internal)	◆				Recruiting volunteer to own requirements/design/planning. Also need to recruit volunteers to do regular blasts.
	Media Branding/ Communications Plan (Kal: Vol)	◆				Setting up planning team.
	Marketing Strategy for Webinars (Davin/Lance)	◆		6/30/15		Plan to work on this during May/June as results of inventory complete.
	Executive Roundtable	◆				

PMIWDC Marketing Status Report for April 2015: Metrics						
Budget						
Category	Status	Approved	Current	Expected	Comments	
Revenue	\$	102,400	26,533		Does not include R5. Slightly behind where we want to be now.	
Expense	\$	22,116			Spend lower than projected thus far.	
Total		80,284				
Sponsorship						
Sponsorship Type	Q1	Apr	May	Jun	YTD	Notes
R5 Sponsorships				0	29,100	UMD Committed – waiting to negotiate all sponsorships to get to best overall package
Dinner Sponsorships				0	2,000	
Digital Ads				12522.50	22,233	
Marketplace Sponsorship					1,800	
Native Content (Newsletters)	0	0	0		500	
Key Objective Metrics						
Metric	Annual Goal	Current Month	Prior Month	Difference	Comments	
Facebook Likes	1,000	791	789	0.25%		
Facebook Impressions	TBD	134	856	-84.35%	March post about Future Cities generated huge engagement!	
Twitter Followers	TBD	1,188	1,162	2.24%		
LinkedIn Members	8,000	6,369			LinkedIn doesn't provide analytics	
Website Hits	60,000	47,295	54,050	-12.50%		

Questions?



Get the dashboard

Text **EXECDASHBOARD** to 33444

Respond with your email address

Dashboard will be sent right to your inbox.

Want more?

Consulting



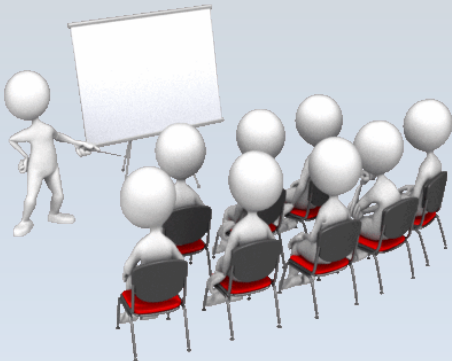
Speaking



Staffing



Training



Coaching



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