

DOCUMENT: End-of-Project Metrics Worksheet

Overview

The purpose of a metrics worksheet is to capture a constant set of metrics so that your organization can see the trends for delivering projects over a phase of time. The metrics show how well project teams are meeting their commitments in terms of quality, cost, and cycle time. As more and more projects report the metrics, a baseline will be established that you will be able to compare your projects to over time.

If these project demographics and metrics are placed in a file or database, they can be analyzed to show the overall trends. For instance, you can compare actual cost to deliver versus the estimated cost, and then track the trends over time. The advantage of gathering some project demographics is that you can compare similar projects. For instance, you can compare customer satisfaction levels with mainframe development projects versus Web development projects.

The other benefit of gathering project demographics is that you can use the information for future project estimates. For instance, if you have a new Web development project, using ASP and SQL*Server, for the entire company, you can query the prior metrics to get a sense for how much time, effort, and cost were involved. This may be of help for estimating your project. In general, whatever demographics you capture from completed projects can be used to search on later for new projects.

There are two sections to the End-of-Project Metrics Worksheet:

- Section I is used to describe your project, so that the metrics can be analyzed and interpreted based on project characteristics. In addition, this section contains the worksheet for reporting the appropriate project metrics.
- Section II is used to determine client and end-user satisfaction with the solution. The summarized results are recorded in questions M7 to M23 on the metrics worksheet.

The metrics are designed to provide valuable information on projects, while taking a minimum amount of time to complete. For most projects, this information should take no more than two hours to complete. Information that is not readily available should be skipped or estimated.

SECTION I: PROJECT DEMOGRAPHICS

Project Name: _____

The questions in Section I are multiple choice. Please follow the instructions regarding whether one or multiple items can be checked. If a question allows for an answer to be written in, please do so only if none of the current responses are adequate. If there are several answers that are possible choices and the question asks for only one, check the one that best fits or is most applicable. If the question is not applicable for your project, note as such and continue with next question.

1. Development Method/Project Type:

Choose only one type for a given project. If a project appears to be more than one type, use the predominate type.

- Traditional Custom Development (waterfall approach)
- Rapid Application Development (prototyping, spiral techniques)
- Software Package Implementation (all or substantial portion of project was a purchased package)
- Special Development (data warehouse, decision support, knowledge management, etc.)
- Enhancement (enhancement of existing application)
- Research and Development (create strategy, make recommendation, white paper, etc.)
- Infrastructure (networks, telephony, help desk, etc.)
- Other (Please specify) _____

2. Audience:

(Choose one per project)

- Single User Single Organization
- Multiple Organization Enterprise-Wide/Global

3. Development Architecture:

Please be as specific as possible (add more lines, if necessary)

Hardware

Operating
System

DBMS

Language

Tools

PROJECT DATA COLLECTION WORKSHEET

This form is used to report various pieces of information about your project. Metrics M7 – M15 refer to the summary of the Business Client Satisfaction Survey. Metrics M16 – M23 refer to the End-User Satisfaction Survey. If you cannot capture certain data items, enter “NC” to represent “not captured.”

	Actuals Versus Estimates	Overall
M1	Actual Effort to Deliver Total IS labor hours (employees, contractors, consultants) to complete this project	
M2	Actual Duration to Deliver Total number of calendar days to complete this project	
M3	Actual Cost to Deliver Total IS labor cost (fully burdened charge-back rate) to complete this project, including hardware, software, training, etc.	
M4	Estimated Effort to Deliver Total IS labor hours estimated to complete this project	
M5	Estimated Duration to Deliver Total number of calendar days estimated to complete this project	
M6	Estimated Cost to Deliver Total IS labor cost (fully burdened charge-back rate) estimated to complete this project, including hardware, software, training, etc.	

	Customer Satisfaction Ratings (From Business Client Satisfaction Survey)	# Responses	Average
M7	Project Delivery Customer Satisfaction Cost Rating Average rating from Section II, question 1a from the Business Client Satisfaction Survey		
M8	Project Delivery Customer Satisfaction Time to Deliver Rating Average rating from Section II, question 1b from the Business Client Satisfaction Survey		
M9	Project Delivery Customer Satisfaction Quality of Solution Rating Average rating from Section II, question 1c from the Business Client Satisfaction Survey		

M1 0	Project Delivery Customer Satisfaction Functionality Rating Average rating from Section II, question 1 d from the Business Client Satisfaction Survey		
M1 1	Project Delivery Customer Satisfaction Business Expectation Rating Average rating from Section II, question 2a from the Business Client Satisfaction Survey		
M1 2	Project Delivery Customer Satisfaction Business Need Rating Average rating from Section II, question 2b from the Business Client Satisfaction Survey		
M1 3	Project Delivery Customer Satisfaction Impact Rating Average rating from Section II, question 2c from the Business Client Satisfaction Survey		
M1 4	Project Delivery Customer Satisfaction Communication Rating Average rating from Section II, question 2d from the Business Client Satisfaction Survey		
M1 5	Project Delivery Customer Satisfaction Business Partner Rating Average rating from Section II, question 2e from the Business Client Satisfaction Survey		

	End-User Satisfaction Rating (From End-User Satisfaction Survey)	# Responses	Average
M1 6	Project Delivery End User Ease of Use Rating Average rating from Section II, question 1a from the End-User Satisfaction Survey		
M1 7	Project Delivery End User Response Time Rating Average rating from Section II, question 1b from the End-User Satisfaction Survey		
M1 8	Project Delivery End User Reliability Rating Average rating from Section II, question 1c from the End-User Satisfaction Survey		
M1 9	Project Delivery End User Quality Rating Average rating from Section II, question 1d from the End-User Satisfaction Survey		
M2 0	Project Delivery End User Functionality Rating Average rating from Section II, question 2a from the End-User Satisfaction Survey		
M2 1	Project Delivery End User Training Rating Average rating from Section II, question 2b from the End-User Satisfaction Survey		
M2 2	Project Delivery End User Support Rating Average rating from Section II, question 2c from the End-User Satisfaction Survey		
M2 3	Project Delivery End User Productivity Rating Average rating from Section II, question 2d from the End-User Satisfaction Survey		

SECTION II: CLIENT SATISFACTION SURVEYS INSTRUCTIONS

There are two surveys in the packet, representing two audiences. (Although in some cases, the same client could receive both.) The first survey is intended for business clients who assisted in the project, including the project sponsor, business project manager, and all business analysts and subject matter experts. This survey should be sent to as many applicable business clients as practical. The results should be documented on the Project Data Collection Worksheet.

The second survey is intended for business clients who are end users of the application. These people may not have been involved in the project itself, but are regular users of the application. This survey is optional, with the resulting information used as input into a product enhancement plan.

BUSINESS CLIENT SATISFACTION SURVEY

Project Name: _____

Your Name (optional): _____ Date: _____

Instructions: We would like to gather your feedback regarding the project named above, as well as your satisfaction with the performance of the team that built it. The results of the survey are used to determine our overall organizational performance in delivering projects.

Rating:

5	4	3	2	1
Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Somewhat Dissatisfied	Very Dissatisfied

1. How satisfied are you that the solution met your expectations in the following areas?

a) Cost	5	4	3	2	1
b) Time to deliver	5	4	3	2	1
c) Quality of solution	5	4	3	2	1
d) Functionality required	5	4	3	2	1

2. How satisfied are you that

a) The delivered solution met your expectations?	5	4	3	2	1
b) The delivered solution met the business needs?	5	4	3	2	1
c) Issues were resolved to minimize business impact?	5	4	3	2	1
d) Status was communicated regularly and effectively?	5	4	3	2	1
e) The project team was an effective business partner?	5	4	3	2	1

END-USER CLIENT SATISFACTION SURVEY

Application Name:

Your Name (optional): _____ Date:

Instructions: We would like to gather your feedback regarding the application named above. The results of the survey are used to determine how well the application meets your needs and what can be done to improve it.

Rating:

5	4	3	2	1
Very Satisfied	Satisfied	Neither Satisfied nor Dissatisfied	Somewhat Dissatisfied	Very Dissatisfied

1. How satisfied are you that the solution met your expectations in the following areas?

a) Ease of use	5	4	3	2	1
b) Response time	5	4	3	2	1
c) Reliability	5	4	3	2	1
d) Overall quality	5	4	3	2	1
e) Functionality required	5	4	3	2	1

2. How satisfied are you that

a) You received adequate training on the system?	5	4	3	2	1
b) You are receiving adequate support for problems?	5	4	3	2	1
c) The system increases your productivity?	5	4	3	2	1