

# Beam Report

overview



1. the subject
2. the goal
3. four golden rules
4. various kinds of data
5. the process
6. the routing capability
7. the big picture
8. operation

➤ [www.systemam.fr/eng](http://www.systemam.fr/eng)

As for **Management & Steering information circuits** ...



... where do **YOU** stand, really ?

## Entropy

### ▲ Pollution

- Too many event-driven exchanges
- Bad or uncertain stake sharing
- Incidents not handled at right level

### ▲ Risks

- Alerts lost in noise
- Permanent crisis mode, no margin
- Loss of confidence

### ▲ Costs

- Multiple circuits, as many reports
- 4hrs/week/pers, 80% cutting & pasting
- Meetings : 80% hearing, 10% deciding

## Streamline

### ▲ The “necessary & sufficient”

- structured, relevant, homogeneous info
- To each as needed, nothing more.
- Reflect scopes of responsibility

### ▲ Visibility & Effectiveness

- Priorities made visible and tracked
- Get the big picture, zoom-in as needed
- more Value Added by Managers

### ▲ Savings

- One source doc, several circuits
- Automated merging & formatting
- Meetings : 80% decision making

## → four Golden Rules

1

### Quality at the source

- > Common conventions, normalized topics
- > Predefined structures when relevant
- > No energy spent in formatting issues

2

### To each as needed, nothing more

- > Automated filtering/routing functions
- > Standards adaptable to local needs

3

### Let managers add value

- > Expose the "Take-over or Forward" decision
- > Facilitate synthesis at business-axis level

4

### Provide effective "points of view"

- > Cross-consolidation, sorting, filtering
- > Summaries, dashboard views

## Simple text paragraphs (most frequent)

Progress/event notice,  
Plans, Alerts, Requests ...

## Structured items

Actions, Milestones,  
high-level indicators, ...

## Specialized business data

Manual input, or import  
from external source

## Foreign objects

Graphics, detailed tables  
External documents  
(linked, or embedded)

**1.1. Project ALPHA**

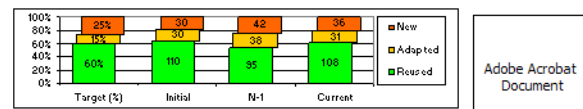
- Design team leader still waiting for exact global project planning. In the meantime, can't optimize design team allocation  
**Action :** PMO to clarify and communicate planning before W07
- Design software tool installation in progress. Should be ready for operation Feb 13th.
- ST879 part design phase 3 completed. Compliance with JMP-6 verified. Customer confirms his satisfaction, and says he might lighten the formal auditing procedure for further phases.

Jalon	Commentaire	Date contrat	Etat	
Kick-off		10/08/2011	⊗	Jalon
Preliminary Design Review	1 semaine de marge, mais pb disponibilité client	07/09/2011	▲	Jalon
Proto 1	Retard probable tests YER	13/10/2011	◆	Jalon

### Global Workload

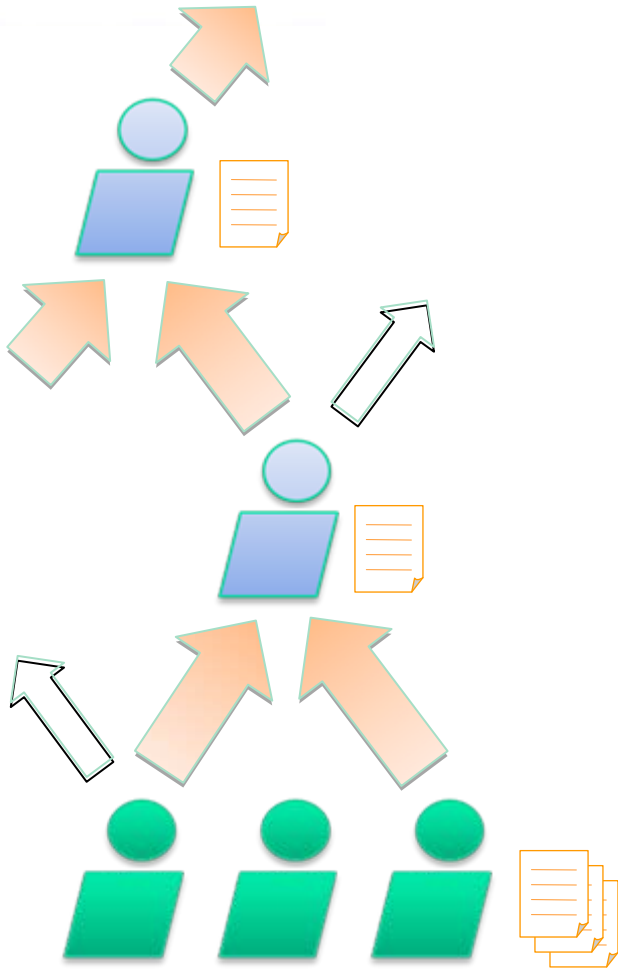
Cid	Resource	Budget	revised	Used	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Y++
2	Project Mgr	55		34				5	12	12							
2	Architect Infra	45		23				7	8	8							
2	Security	20		6				1	4	4							
2	Network	40		7				10	14	12							

Indicateur courant (cliquer sur document incorporé pour analyse détaillée)



Méthodologie : voir [W:\QA\\_France\Projets\Innov-15.docx](#)

## BEAM-REPORT : the process



- 1 Write **consistent reports** with the **right** info level
- 2 Automatically **merge, filter**, get **summaries**
- 3 Validate, **add value**, to build **next level report** ...

## By filtering at send-time

- > On an item-by-item basis
- > Based on Topic (titles), Type of information, Weighting, Field values
- > Predefined criteria, or on-demand selection

## Example of a routing/filtering matrix :

<b>Item type</b>	<b>Destination</b>					
	<i>Direct Mgr</i>	<i>Progr. head</i>	<i>PMO</i>	<i>Co-contractor</i>	<i>Customer</i>	<i>Team</i>
Global Project status (flag + comment)	●	●	●	●	●	●
Milestones/Deliverables		if red status	●		●	●
Alerts, Problems, Risks	if unhandled	if unhandled				●
"Normal work" events				●	●	●
Technical indicator	if red status	●	●	●	●	●
Help required	●					●
Workload, resource issues	●		●			
People, team life	●			●		●

# BEAM-REPORT : the big picture

## Example of a weekly dashboard

generated automatically from the information provided by the teams.

### Top-5 issues

**Résumé Top-5**

- DGA: Animation, Jeunesse, Loisirs et Sports** : La reconduction du projet Nouvel Ere risque d'être retardée. Plus de 50 km de parcours longeront les berges du Mississip...
- DGA: Services Urbains** : Le projet d'aménagement, sur lequel le Grand New York avait demandé une réflexion d'ensemble en lançant son appel d'offr...
- Pôle: 1** : Les élus du CHS ont soulevé la question des locaux de la place occitane (locaux en sous sol du parking avec des problè...
- Pôle: 4** : A noter : une discussion intéressante entre élus sur la démarche espace public qui se lance sur New York : échange entre...
- Pôle: 6** : Blaize : Vive réaction de M. Delan suite au courrier de M. Pitt demandant que le travail relatif au projet de couloir bu...

### Projects status

**Résumé CAP Etat Projets**

Projet	Arbitr	Alerte	Retard
• <b>Projet Service+</b> :	⚠		
• <b>Élargissement Compétences C.U.</b> :	✖		
• <b>Office ABP</b> :		E	
• <b>Eau et Assainissement (Tarifs, Prospectives)</b> :			⬇
• <b>Nouvelle Ligne 3</b> :	⚠		⬇

### Expected decisions

**Résumé Arbitrages ur**

Objet	Type	Echéance	
• <b>DGA: Développement Social et Solidarités</b> : Les axes des 6 Conseils de secteur de la ville doivent être validés...	E	14/04/2011	⚠
• <b>DGA: Culture</b> : La réduction doit-elle être annulée pour les musées du Petit Louvre...	A		⚠
• <b>CAP: Projet Service+</b> : [Exemple] Suite retard mise en place ressource. Accélérer embauche svp	A	25/02/2011	⚠
• <b>CAP: Élargissement Compétences C.U.</b> : [Exemple] Le choix technique concernant POZ sera déterminant pour l...	T		✖
• <b>CAP: Nouvelle Ligne 3</b> : [Exemple] Demande arbitrage suite contestation assoc. et élus. Conf...	E		⚠

### KPI summary

**Résumé Indicateurs ma**

Objet	Valeur	Etat
• <b>Urbanisme</b> : Demandes P.C. / mois	108	🟢
Traitements spéciaux	12%	🟡
• <b>RH - Effectifs et Emplois</b> : Nombre de recrutements en cours	80	🔴
Réalisation recrutements / prévisions	85%	🟡
• <b>RH - Absentéisme</b> : Jours arrêt Maladie ordinaire	0	🟢
Jours arrêt Accident du Travail	0	🟢



## ▲ Interfaces

- > E-mail : direct send/receive interface (MS-Outlook®)
- > Storage : File-system, DMS, MS-Sharepoint® [Q4-2012]
- > Data (structured) :
  - Import/update from XLS, XML, SQL
  - Export to XLS, XML, SQL
- > Publishable Documents :
  - Export to HTML, PDF, RTF
  - Export to editable MS-Powerpoint® presentations

## ▲ Deployment

- > MS-Windows all versions (2000 to 7)
- > Self-contained, no dependency, no central resource required
- > Extended-Enterprise compatible
- > 1-hour training for end-users