

# Enhancing the Project Lifecycle



**Rob Edwards**  
**Sr. Product Director**  
*Schedule & Risk*

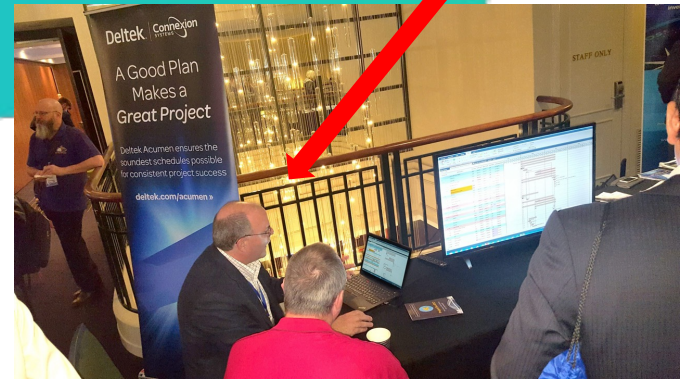
# Glad to be Back

1<sup>st</sup> ProjectChat since Covid

A lot has happened in that time.



2019



2017

2022

Deltek. Project Portfolio Management >

## PPM-16: Implementing Agile Programs in an EVM World

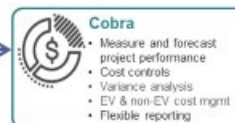
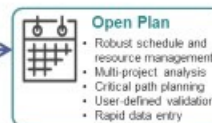
Amy Feinberg, National Security Solutions, Senior Director of Delivery

Denise Russell, Deltek, PPM Senior Solutions Architect

Deltek ProjectCon 2022

### NSS Idemia Proposed Deltek Solution

Program Controls and Project Management



Schedule Quality and Risk Management

Finance



Customer Reports



Internal Decision Support

Deltek

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10

National Security Solutions



AN @ IDEMIA COMPANY

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2022

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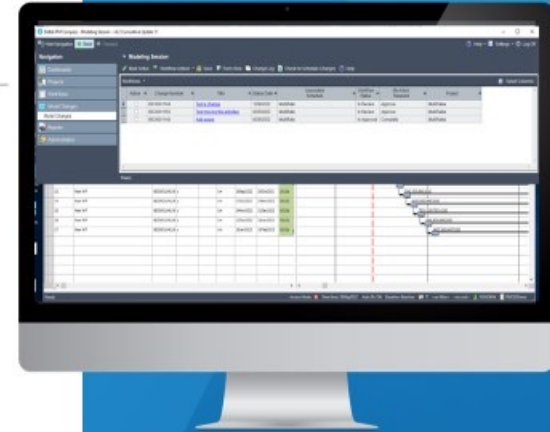
## PM Compass 8.2 April 2022

Jack Newton, Senior Product Manager

Fully integrated modeling of  
budget change requests

### Integrated BCR

- » Model multiple changes at once
- » Manage change across projects, using master projects
- » Create and manage relationships including external projects
- » Do more work in one place, modeling what-if scenarios with a full view of effects on the entire schedule.



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18

2023



Significant new risk capabilities

And a new color scheme

### Acumen 8.9 – Risk Top 4

- » **Shared Risk Registers**- you can now have a risk register shared by multiple sets of data, including cost and schedule data, as well as multiple snapshots
- » **Risk Correlation**- you can now correlation risks in the register, both positively and negatively
- » **Risk Impact Enhancements**- Impacts can now individually be percentage or value based by risk
- » **Risk Reporting Enhancements**- cost risk drivers can now break out the impact of schedule delays as a separate driver

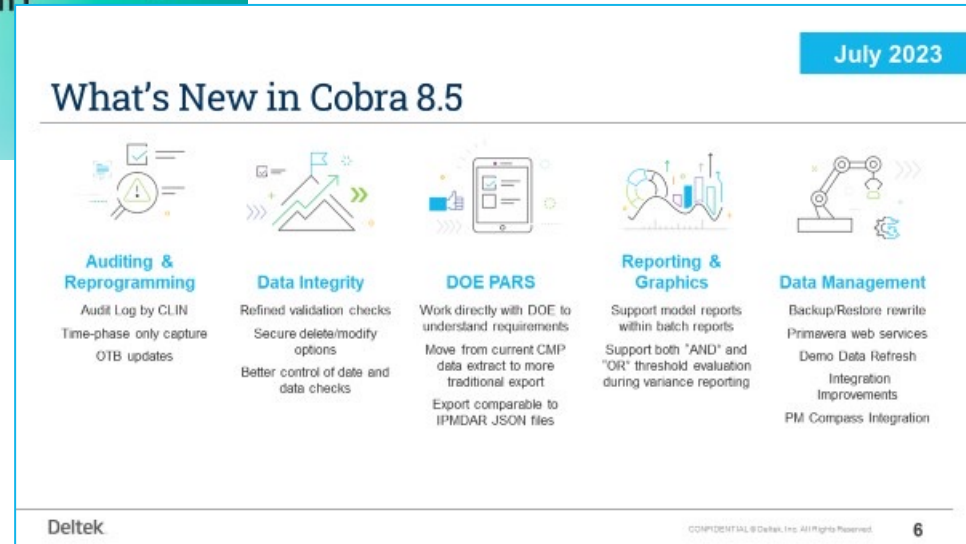
2023



**Deltek.**  
**ProjectCon**  
**2023**

**PPM-01: Deltek Cobra and wlsight Analytics Product Updates**  
Dan Demangos, Deltek

Compliance, Auditability and efficiency improvements



**July 2023**

## What's New in Cobra 8.5

- Auditing & Reprogramming**
  - Audit Log by CLIN
  - Time-phase only capture OTB updates
- Data Integrity**
  - Refined validation checks
  - Secure delete/modify options
  - Better control of date and data checks
- DOE PARS**
  - Work directly with DOE to understand requirements
  - Move from current CMP data extract to more traditional export
  - Export comparable to IPMDAR JSON files
- Reporting & Graphics**
  - Support model reports within batch reports
  - Support both "AND" and "OR" threshold evaluation during variance reporting
- Data Management**
  - Backup/Restore rewrite Primavera web services
  - Demo Data Refresh
  - Integration Improvements
  - PM Compass Integration

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# Recent Releases

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Acumen 8.9

Acumen Touchstone 8.2

Cobra 8.5

PM Compass 8.3 & 8.4

wInsight Analytics 8.3.2

Open Plan 8.7



**125+ New Features**

# Roadmap

How do we choose what to develop?



# Deltek PPM Vision

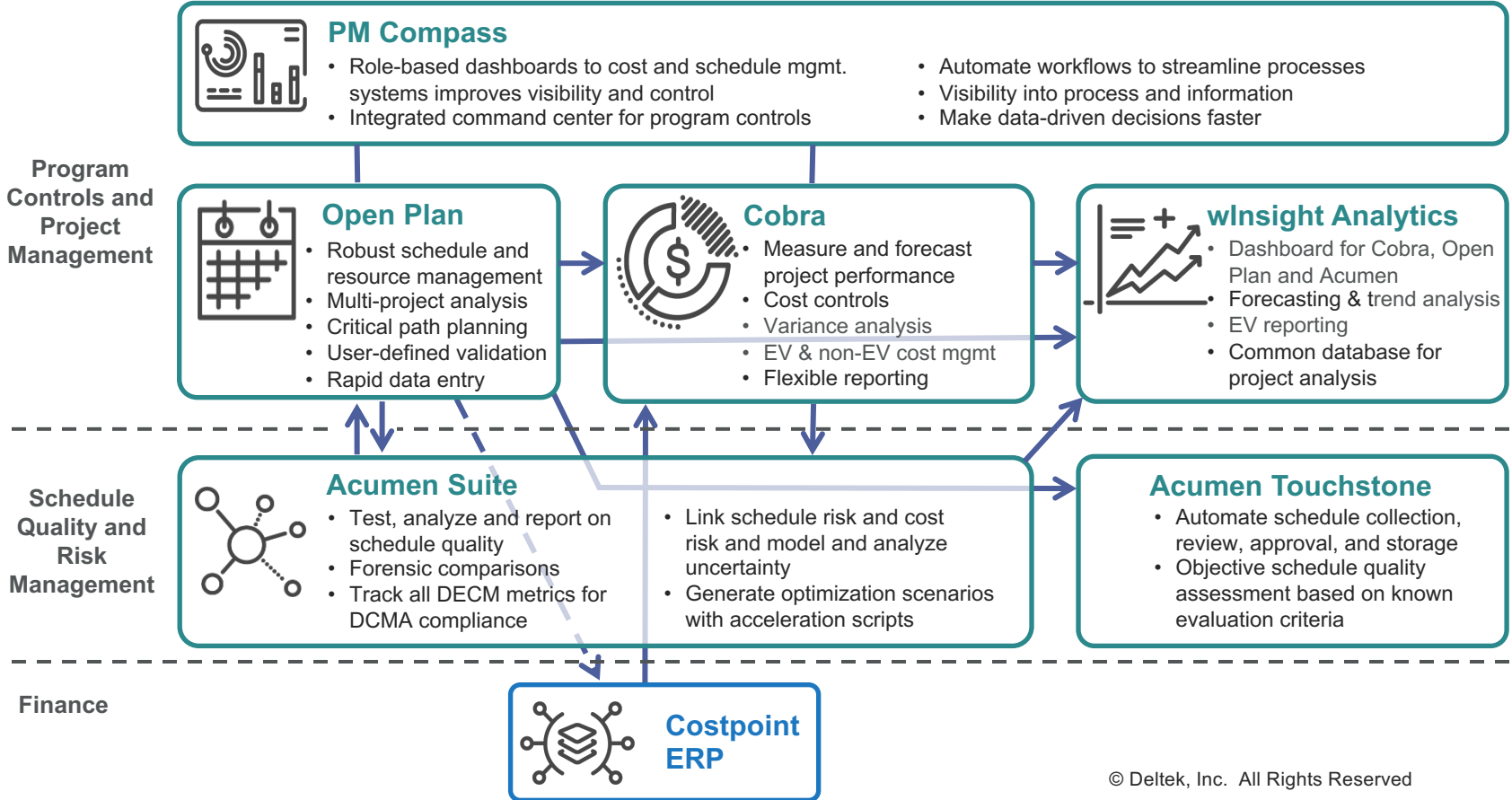
Deliver the most compelling and complete project management solution for organizations that view project execution as a critical success factor for their business



**Cost • Earned Value • Schedule • Risk • Analytics**

**Innovative    Integrated    Compliant**  
**Secure    Dependable    Insightful    Valuable**  
**Performant    Modern**  
**Integratable    Intuitive    Scalable**

# Deltek Project & Portfolio Management



# PPM

## *The Five Strategic Roadmap Drivers*

*Driven by the end user experience*



# PPM Customer Idea Portal - <https://ppmideas.deltek.com/>

- » Your Ideas, Your Portal
- » Contribute to building a community of ideas to improve PPM
- » Review, comment and vote on ideas contributed by your peers that would benefit your organization
- » Receive status updates as ideas move from consideration to planned to implemented

The screenshot shows the Deltek Idea Portal interface. At the top, it says "Deltek Project Portfolio Management" and "Idea Portal". There is a search bar and a button to "ADD A NEW IDEA". On the left, there is a navigation menu with categories like "My Ideas", "My votes", "My organization", and "Deltek Featured Ideas". Below that, there is a "FILTER BY CATEGORY" section with a list of categories and their counts. The main content area is divided into "Deltek Featured Ideas" and "All ideas". The "Deltek Featured Ideas" section shows a featured idea with a "VOTE" button and a "Share feedback" link. The "All ideas" section shows a list of ideas with "VOTE" buttons and "Likely to implement" tags.

Rank	Feature	Product value	Reach	Impact	Confidence	Effort	Feature reference #	Feature type	Feature status
30	Support delay penalties in Acumen Risk	68	60	100	90	8	PPM-271	New	New

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## Clarity: Architecture & Engineering Industry Study

43<sup>rd</sup> Annual Comprehensive Report



# About the Studies

- » 44<sup>th</sup> year of Clarity A&E in NA
  - » 540+ A&E firms in U.S. and Canada
  - » In collaboration with ACEC, ACEC Canada, AIA and SMP
- » 14<sup>th</sup> year of Clarity GovCon
  - » 700+ respondents
  - » 11 primary industries

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## Clarity 2022: Government Contracting Industry Study

13<sup>th</sup> Annual Comprehensive Report



#DeltekClarity

# PROJECT MANAGEMENT CHALLENGES

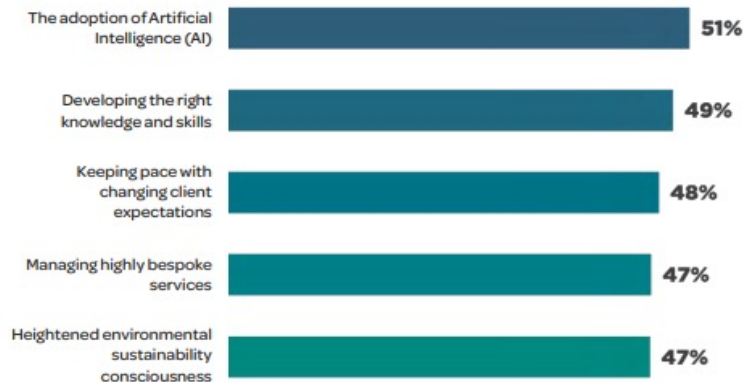
Over the next five years the industry will be faced with a number of trends that present challenges for project management.

Half the firms surveyed say that adoption of Artificial Intelligence (AI), developing the right knowledge and skills and keeping pace with changing client expectations are ranked in their top five challenges.

Australia & New Zealand are most likely to rank the adoption of AI in their top five project management challenges (58%) and BeNeLux the least (39%). In the UK, adoption of AI is the biggest challenge alongside developing the right knowledge and skills. In Germany and BeNeLux the greater project management challenge is developing the right knowledge and skills.

Whilst A&E firms are most likely to rank the adoption of AI in their top five project management challenges, consulting firms are most likely to be concerned about keeping pace with changing client expectations.

## Top project management challenges



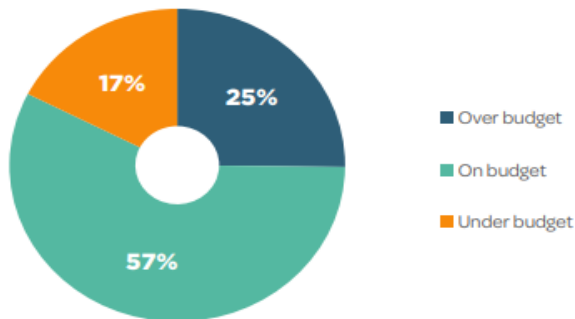
Similar differences are evident by size of organisation with small organisations most likely to rank keeping pace with changing client expectations in their top five project management concerns whilst large organisations are most likely to be concerned with the adoption of AI.

## Schedule and Budget Stability

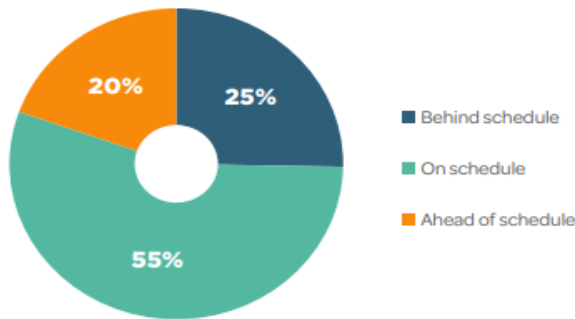
It's critical to government contracting to keep on track with timelines and budgets. **About half of companies track actual vs. planned costs as a top-three project management KPI**, from a list of 10 options.

Despite experiencing a variety of challenges, over half of the projects were reported on schedule (55%) and on budget (57%). However, a quarter of projects went over budget or fell behind schedule (25% each). Interestingly, larger companies were more likely to be behind schedule or over budget despite their resourcing advantages. This may be due to larger companies typically managing more complex projects with a higher number of interdependencies and diverse supply chains. Or could also be that smaller companies just don't have the systems in place to really inform them on project budget and schedule health until they are complete.

### Project Budget Performance



### Project Schedule Performance

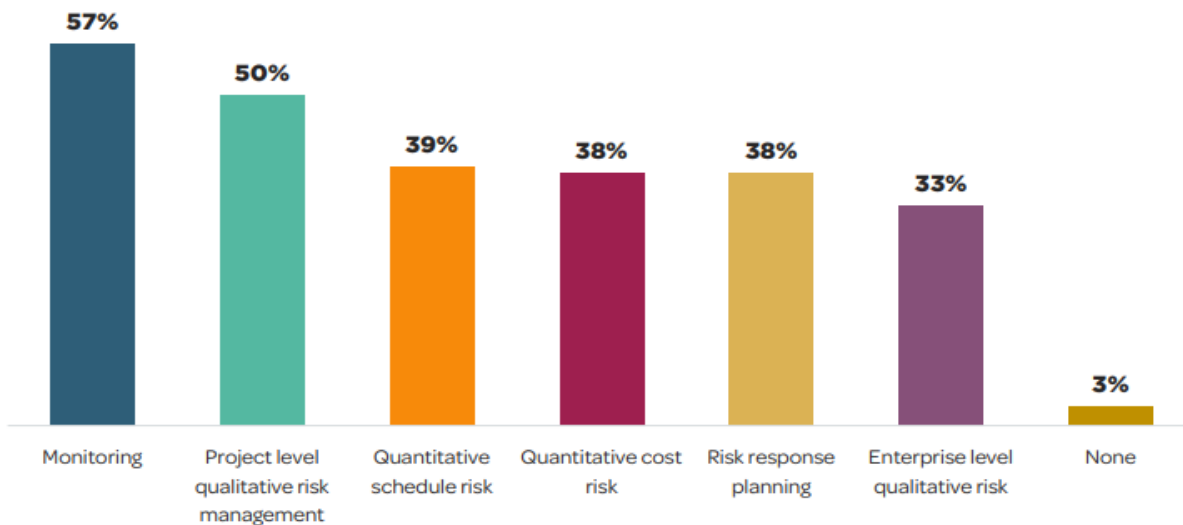


## Risk Management Is Common, but Practices Vary

Companies report using risk management practices of some form on two thirds (67%) of their projects. This trend holds for both small and larger companies. However, how these practices are implemented varies across companies.

The top project phases for scheduled risk analysis were during project initiation and execution, both tied for first (59%), followed by the proposal phase (50%). Businesses are using a variety of practices to perform risk analysis, led by monitoring (57%) and project level qualitative risk management (50%).

### Risk Practices Used





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# Clarity: Trends & Insights for Architecture, Engineering & Consulting Firms

4th Annual EMEA and APAC Clarity Industry Study

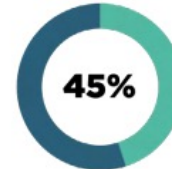
Based on research conducted by 3Gem and Deltek.

**3Gem**  
Research & Insights

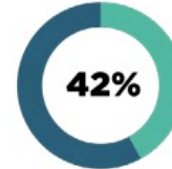


# 4<sup>th</sup> Annual EMEA and APAC Study

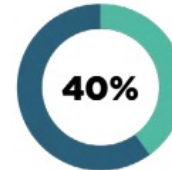
## Top priorities in 2023



**investing in new technology**



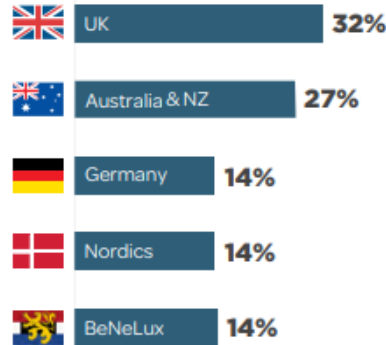
**Expansion into new markets**



**Attracting more talent**



## Countries included



This year firms from UK, Germany, Nordics, BeNeLux and Australia & New Zealand took part.

# PROJECT MANAGEMENT CHALLENGES

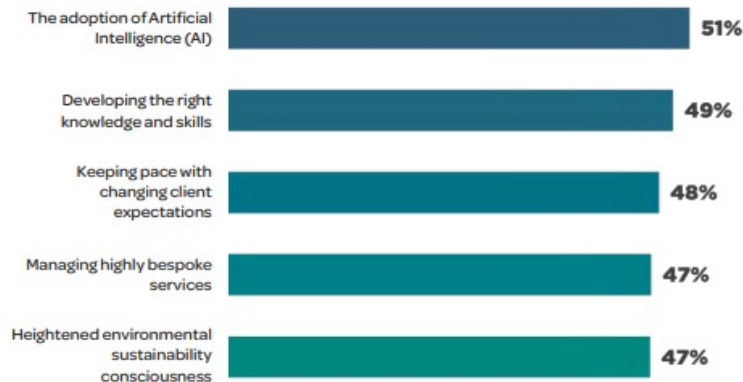
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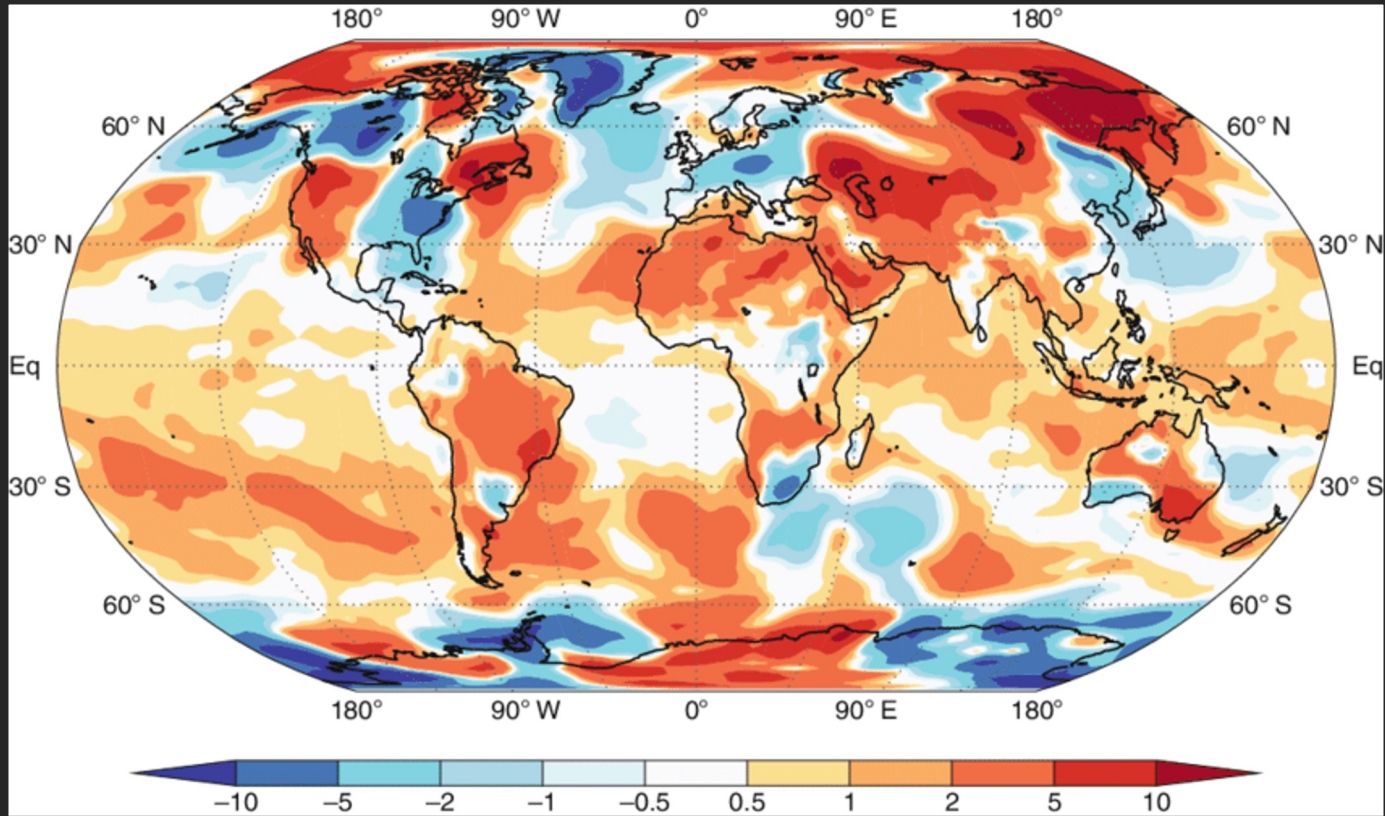
# Partner Solutions

We also extend solutions  
through partnering.

Probabilistic Weather data  
anyone?



**EHAB**



**Weather volatility is a global phenomenon**

# Weather, an industry wide problem



→ **45%**

Of construction projects are delayed by the weather.

**15yr**

Insurance premiums are at a 15 year high.

**1450%** ←

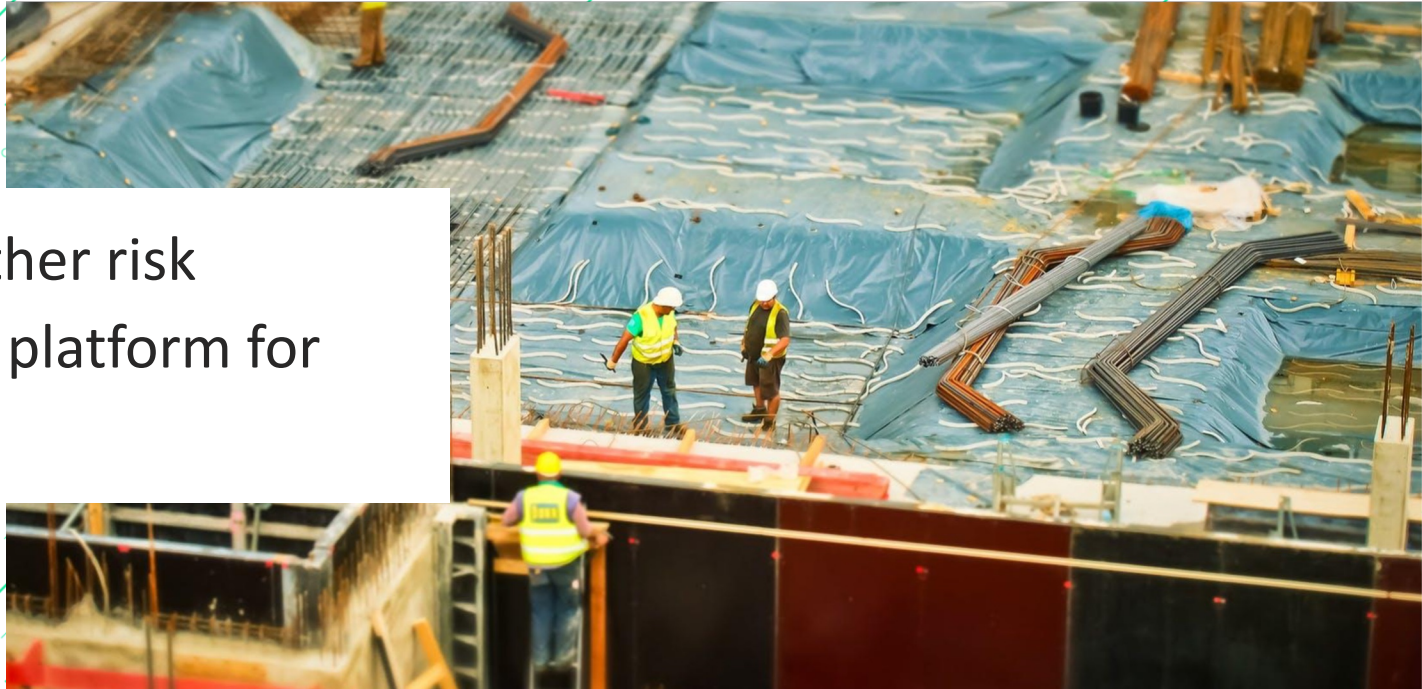
Increase in the likelihood of extreme delays.

**Weather costs the industry an estimated \$1 trillion per year**



# EHAB

The first weather risk management platform for construction



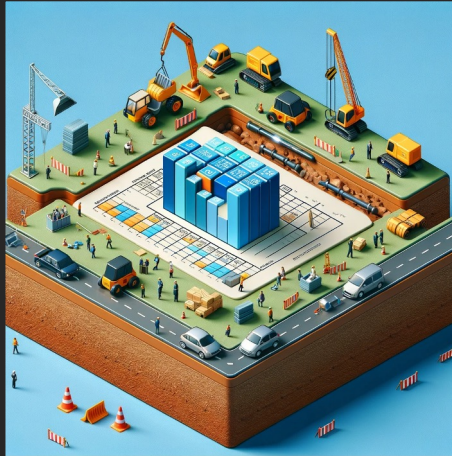
# How the model works

## Global Data



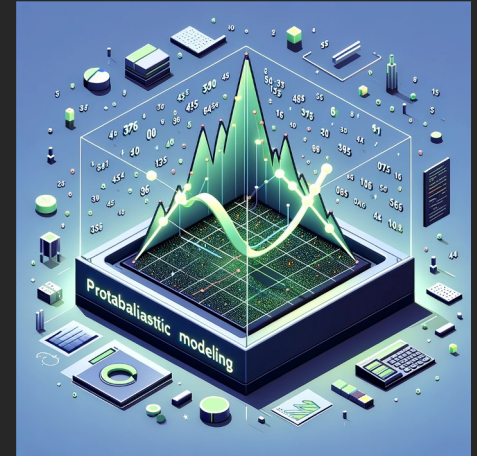
40+ years of historic data, anywhere on planet earth, climate trends, 11 weather types.

## Your Project



Every activity in your plan has a category type, each category type has weather thresholds of impact.

## Advanced Modelling

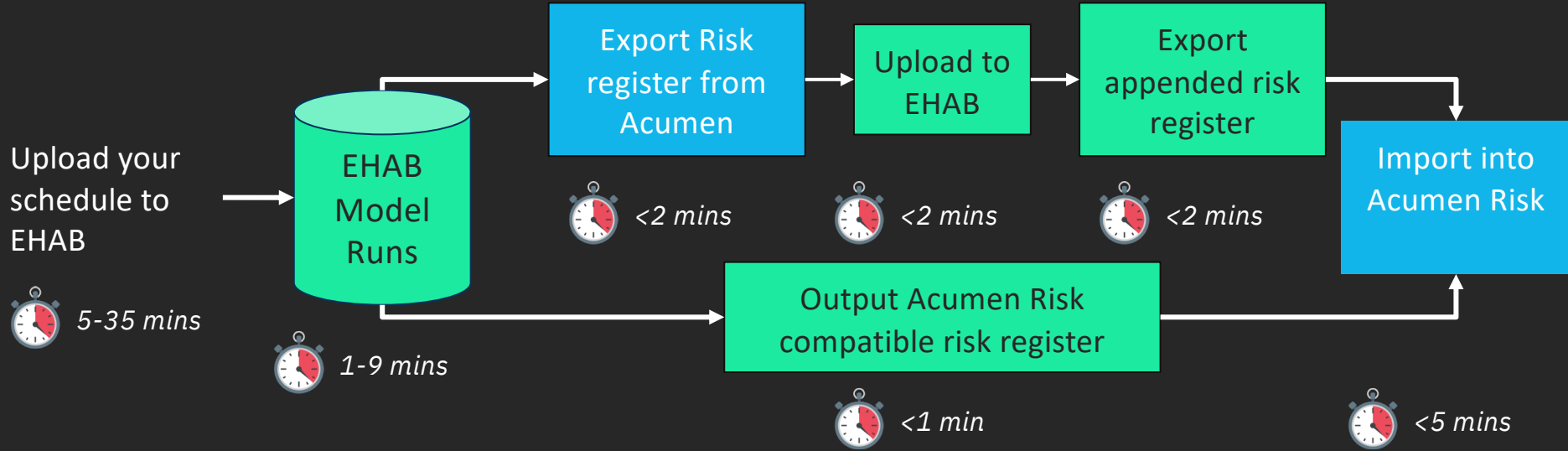


Our custom-built algorithm is finely tuned to consider climate, weather, seasonality, and beyond, ensuring optimal outcomes.

# How the integration works



## Path 1, you have existing risk events



## Path 2, you don't have any risk events





# Disclaimer

The information shared today regarding future product features is considered **confidential**. Furthermore, it **does not represent a commitment** on the part of Deltek to deliver the new functionality that is discussed, **nor does it obligate Deltek** to deliver any new functionality within any specific timeframe.

# Releases Planned In 2024

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Open Plan 8.7

Acumen 8.10

Acumen Touchstone 8.3

Cobra 8.6

PM Compass 8.5

wInsight Analytics 8.3.2



# What's Next?

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Cobra Web



PPM AI



User Experience Features



PPM Administrator



Jira Integration

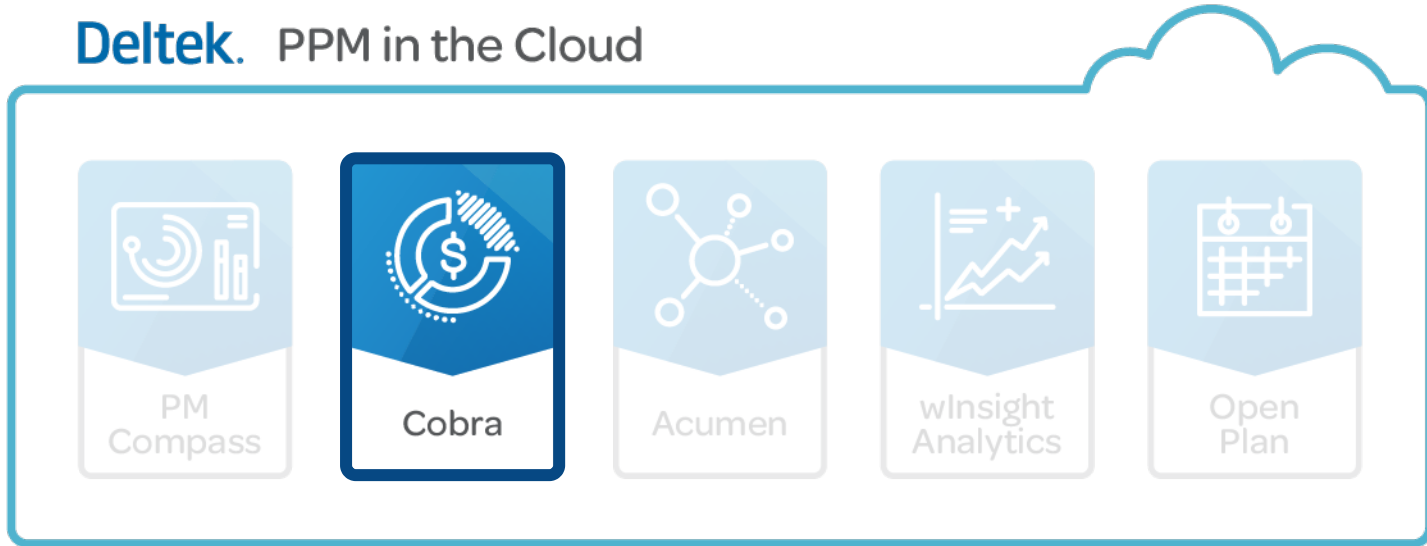


# Cobra Web

From Ground to  
Web/Cloud Gracefully

# PPM Modernization

**Deltek.** PPM in the Cloud



PPM applications will be developed as a cohesive cloud-ready web solution

This process is beginning with Cobra

# Deltek Cobra Web >



## Transformation

- » Modern technology and architecture
- » Cloud-ready
- » On-prem support
- » Scalable deployment
- » Common Deltek technology and framework



## User Experience

- » Modern but familiar interface
- » Optimized user flows with ability to do more from anywhere
- » Better visualizations
- » Improved help and training
- » Tighter integration with Costpoint



## Purposeful Innovation

- » AI/GenAI/ML
- » Business intelligence
- » API/integration

Our mission is to support Project Nation as the industry changes >>>>

# PPM AI

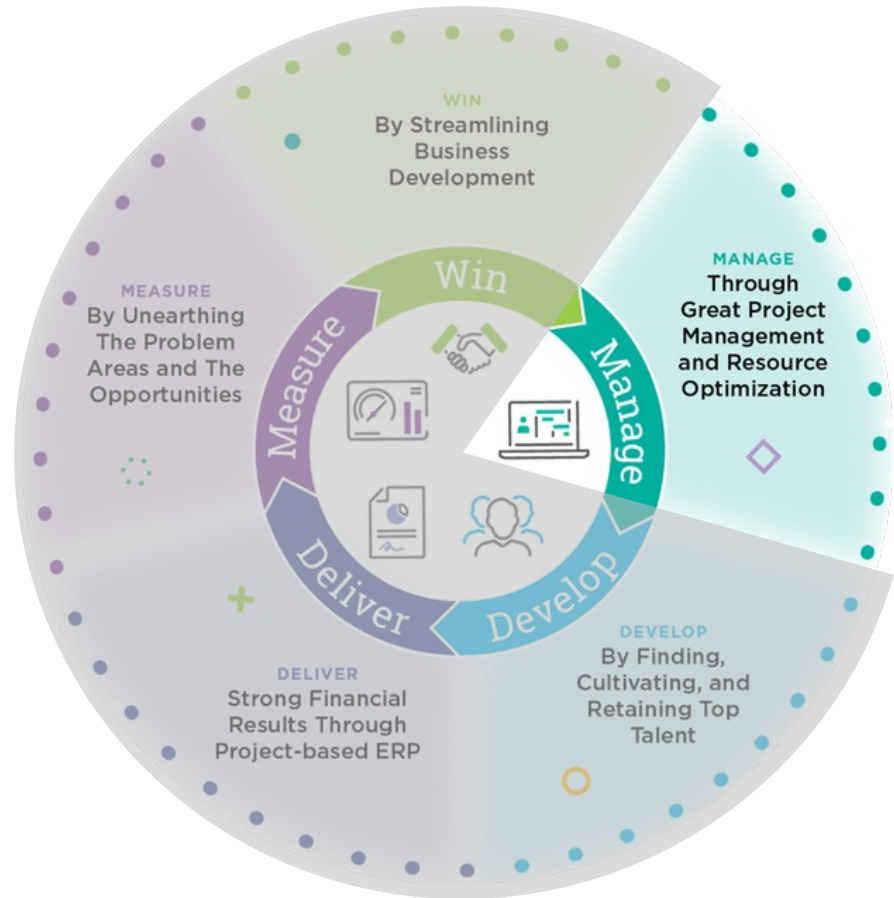
Smart AI,  
Smarter Solutions

# Making the Project Lifecycle Smarter



Generative AI to help you manage variances:

- Narrative Smart Scores can help ensure that variance narratives are submitted complete, clearly-written, and addressing the issues at hand





# PM Compass Narrative Smart Score coming soon

Smarter variance reporting keeps projects on track

## Narrative Smart Score

Control Account 1.1.1/1ENG.CLARK

Smart Score: 3.5 Copy Text Share Print/Save PDF

**Criteria Scores**

- Clarity and Conciseness: 2
- Relevance: 3
- Structure: 2
- Completeness: 4
- Metrics and Qualifications: 1
- ...

**Improvement Tips**

- Clarity and Conciseness: Provide more specific details about the project's technical progress, accomplishments ...
- Relevance: Focus on the most relevant technical achievements and progress ...

Date Generated: 08/18/2023

**Disclaimer:** This Smart Summary is generated by an artificial intelligence tool using publicly available information and proprietary data created and owned by Deltek. It is provided subject to the GovWin IQ Terms. Deltek does not independently verify the accuracy of each Smart Summary. Users are encouraged to independently review and verify the accuracy of the Smart Summary. Copyright 2023 Deltek, Inc.

Close Window

### Deltek PM Compass - Workflows (Explanation of Variance) - v8.4 Gen AI Cumulative Update 01

Show Navigation Back Forward

#### Explanation of Variance

Save New List View Refresh Start Workflow Delete Workflow Print Help

##### New Demo Workflow

General Child Workflows Links Progress

ID: VAR0000000067 Due Date: 10/10/2023

Title: New Demo Workflow Status Date: 2/28/2023

Project: Inter-Planet Shuttle Inter-Planet Space Shuttle

Control Account: 1.1.1.1/1400 Frame Design

	BCWS	BCWP	ACWP	SV	SV %	CV	CV %	SPI	CPI
Current:	1,077.00	0.00	0.00	-1,077.00	-100	0.00	0	0.00	0.00
Cumulative:	70,337.00	75,862.00	84,687.00	5,525.00	8	-8,824.00	-12	1.08	0.90

	BAC	EAC	VAC	VAC %	TCPI to BAC	TCPI to EAC
All complete:	79,686.00	84,687.00	-5,001.00	-6	-0.76	0.00

Variations that exceeded thresholds:  
Schedule variance: Current percentage.  
Cost variance: Cumulative percentage.  
Values calculated using: COM, DIRECT, FRINGE, G&A, OVERHEAD

Copy Narratives

#### Explanation of Variance

Unfavorable cumulative schedule variance of (\$127M) is due to delays in the delivery of the redesigned test material to support test conducts, as well as delays in backshop specimen builds. This is a result of delays in preceding design activities, which slipped due to additional analysis required to release engineering changes and pushed out all subsequent testing activities.

#### Impact

#### Corrective Action

As part of our normal business management process, Programs and Supply Chain are closely monitoring schedule and hold weekly meetings with suppliers to avoid further schedule slips. The project manager needs to find a new job.

#### Monthly Summary

# Cobra Narrative Smart Score coming a bit later

Ship2 (02/28/2020) Code: <Control Account>

Code	Description	Start Date	Finish Date	CV	SV	Budget	Actuals	Progress	BAC	SPI	CPI	EAC	VAC	Smart Score
1.1.1 / 1.ENG.CLARK	Key Plans	1/2/2020	7/21/2020	-2,442.58	782.10	10,980.78	14,205.45	11,762.87	39,859.05	1.07	0.83	44,602.84	-4,743.79	4.50
1.1.3 / 1.ENG.CLARK	3D Modeling	1/2/2020	8/18/2020	15,465.78	2,752.22	56,344.60	43,631.03	59,096.82	195,571.95	1.05	1.35	191,284.13	-4,287.82	3.50
1.1.4 / 1.ENG.SCHULTZ	2d Const Dwg Extr	6/23/2020	9/16/2020	0.00	0.00	0.00	0.00	0.00	425,159.84	0.00	0.00	459,982.45	-34,822.62	1.00
1.2.A.101 / 1.MFG.FRM1	Assemble Unit 101	1/2/2020	10/14/2020	-3,688.02	0.00	29,542.59	33,230.61	29,542.59	63,094.30	1.00	0.89	69,530.36	-6,436.07	1.75
1.2.A.102 / 1.MFG.FRM1	Assemble Unit 102	1/2/2020	11/11/2020	11,785.54	0.00	29,542.36	17,756.82	29,542.36	63,094.30	1.00	1.66	54,056.82	9,037.48	
1.2.A.103 / 1.MFG.FRM2	Assemble Unit 103	1/2/2020	12/11/2020	-2,667.10	-3,545.11	29,542.59	28,664.57	25,997.48	63,094.53	0.88	0.91	68,800.05	-5,705.52	
1.2.F.06 / 1.MFG.FRM3	Cost Group 06 Pipe			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
1.2.F.16 / 1.MFG.FRM3	Cost Group 16 Fab			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Narrative Text

Narrative Category: Explanation

The favorable current period schedule variance of \$1.3K exceeded the 5% threshold. This variance is a result of schedule efficiencies on both the 3D Modeling Zone 2 and 3D Modeling Zone 2 work packages. The Mechanical Designer working on the first work package indicated her work was not as difficult as originally planned. This could potentially provide future schedule benefits. On the second work package, the Mechanical Designer reported six extra hours worked, resulting in a slight unfavorable cost variance (did not exceed the reporting threshold), but also contributing to the favorable schedule variance.

The favorable cumulative schedule variance of \$2.8K exceeded the \$2K value threshold. This variance is a result of two months of favorable schedule variances, both due to schedule efficiencies with the Mechanical Designers work on the 3D Modeling work packages, as described above. This efficiency is expected to continue to be recognized in future periods.

The favorable cumulative cost variance of \$15.5K is a result of an on-going accounting issue with collecting actual costs from the first period of performance. This was expected to be resolved this period, but Accounting has notified the Project Manager that the reconciliation has not yet been approved by the CFO. The Project Manager wanted to load estimated actuals against the erroneous work package but this is not a part of our system description, so we have to report the variance.

Buttons: Get Narrative..., Generate Smart Score, View Smart Score, Help, Apply, Undo, Close

Smart Score

Control Account: 1.1.3 / 1.ENG.CLARK

Smart Score: 3.5

Future Outlook: 3

Language and Style: 4

### Improvement Tips

Criteria	Suggestion
Clarity and Conciseness	Consider rephrasing the sentence "While the accounting error has already been resolved, it needed CFO approval, which did not make this reporting cycle" to improve clarity.
Metrics and Quantification	Include specific numbers or percentages to quantify the progress and accomplishments mentioned in the narrative.
Future Outlook	Provide more details about upcoming milestones, goals, and planned activities to give a clearer sense of the project's trajectory.

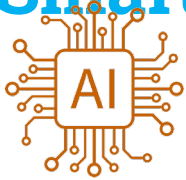
### AI Suggested Narrative

**Explanation:** The project has achieved favorable schedule variances in the 3D Modeling work packages, specifically in Zone 1 and Zone 2. The Mechanical Designer working on Zone 1 reported that the work was less difficult than originally planned, which may lead to future schedule benefits. In Zone 2, the Mechanical Designer worked six extra hours, resulting in a slight unfavorable cost variance but contributing to the favorable schedule variance. The cumulative schedule variance of \$2.8K exceeds the threshold, indicating

Buttons: Help, OK

# Making the Project Lifecycle

## Smarter



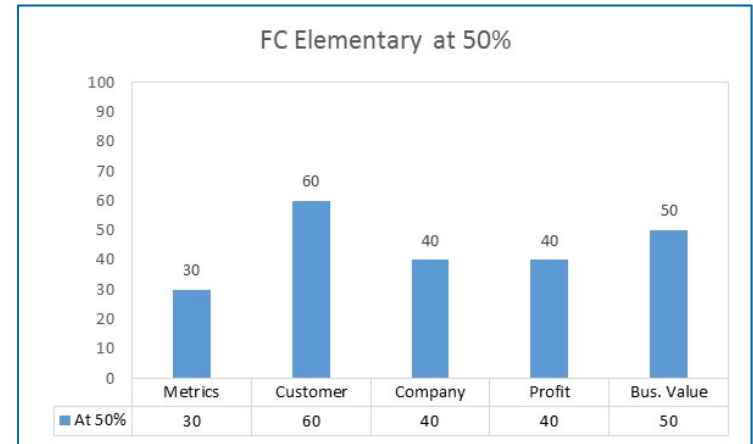
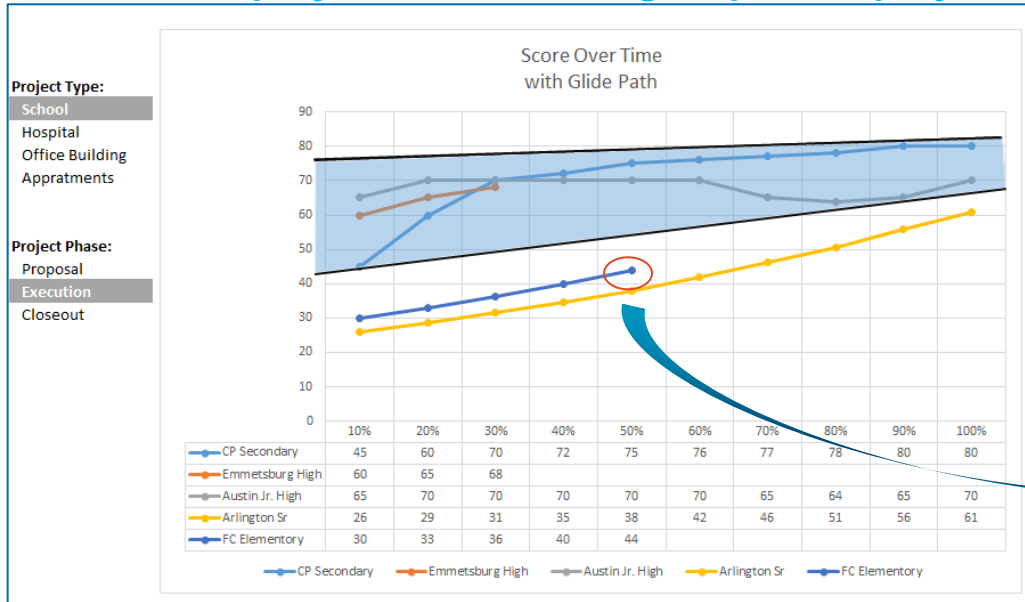
**Traditional AI to help you improve your probability of project success (POPS):**

- Touchstone benchmarking enables you to benchmark your own projects with your own metrics and use that analysis to identify specific areas in a project to improve and increase your POPS



# Touchstone Benchmarking of Project Submittals coming soon

Successful projects establish a glidepath to project success



Predict : Projects not in the glide path, based on your criteria, can be compared to others to develop an action plan to get them back on track

# User Experience

Navigate Naturally,  
Explore Effortlessly,  
Simplify tasks

# UX and Simplifying Common Tasks

---

## OP 8.5

Redundant Logic  
Analysis  
Time phased project  
reporting

## OP 8.6


Quick Filters and Edit in  
place for codes and  
relationships

## OP 8.7

Replan activities  
Import OP BK3  
UDFs on Steps

## OP 8.8

Direct Jira Integration  
Suppress codes no  
longer in use



# UX and Simplifying Common Tasks

---

## Acumen 8.7

BetaPert and Trigen  
support  
New 360 Metrics  
SNAP() Capability

## Acumen 8.8

Parallel Risks  
Risk Driver  
Enhancements  
Fuse Performance

## Acumen 8.9

Shared Risk Registers  
Mitigation Tracker  
New SEM Metrics

## Acumen 8.10

Probabilistic Cash  
Flows  
Risk of Price Changes  
and Liquidated  
Damages

# UX and Simplifying Common Tasks

---

## Cobra 8.3

Support IPMDAR  
Improved Integrations

## Cobra 8.4

New Forecast Methods  
Additional CA and WP  
Codes

## Cobra 8.5

And / Or Logic for  
Variances  
Support for CLINs  
Backup / Restore

## Cobra 8.6

Respread  
improvements  
Option to turn the Total  
Row on or off  
Improved SQL  
Command Utility



# UX and Simplifying Common Tasks

---

## PMC 8.2

Integrated BCR  
workflow and modeling  
BCR Analysis Report

## PMC 8.3

View & Edit Time  
Phased Resource  
Change requests with  
replacement values

## PMC 8.4

And / Or Logic for  
Variances  
Display BCR Analysis  
from Workflow

## PMC 8.5

Temporarily disable  
Progress entry  
Option to suppress  
display of variance  
thresholds tripped  
Additional user fields  
supported

A large, horizontal, teal-colored brushstroke graphic that serves as a background for the text. The stroke is thick and has irregular, hand-painted edges, extending across most of the width of the image.

# PPM Administrator

Admin Elevated,  
Web Enabled

# PPM Web Administrator



## Web

On-prem Web interface

Support for on-prem products



## Ease of Use

Consolidates multiple engines and interfaces

Easier to navigate

More control



## License & Password Management

Enhanced license support

Better encryption

Improved password management

The screenshot shows the 'Users' management page in Deltek Project Portfolio Management. The user 'Steve Todd' is selected, with a last modified timestamp of 03/05/2021 4:45:22 PM by user Kathy Boatwright. The 'GROUPS' tab is active, displaying a table of user groups. A dropdown menu is open, showing a list of groups including 'SYSADMIN', 'Guest', 'PM Group', and several 'Group 1' entries. The 'PM Group' is highlighted in blue.

GROUP ID	DESCRIPTION	MANAGER	PRIMARY ROLE
SYSADMIN	System Administrator	SYSADMIN	SYSADMIN
Guest	Stormburk Ltd	SYSADMIN	GUEST

PM (dropdown) | Prepopulated based on group selection | Same for manager | Same for Primary Role

- + Group 1 (Group description will go here in gray)
- Group 1 (Group description will go here in gray)
- Group 1 (Group description will go here in gray)
- Group 1 (Group description will go here in gray)
- Group 1 (Group description will go here in gray)
- PM Group (Group description will go here in gray)
- Group 1 (Group description will go here in gray)
- Group 1 (Group description will go here in gray)

+ New Group | Search

Easily create users/groups and assign roles

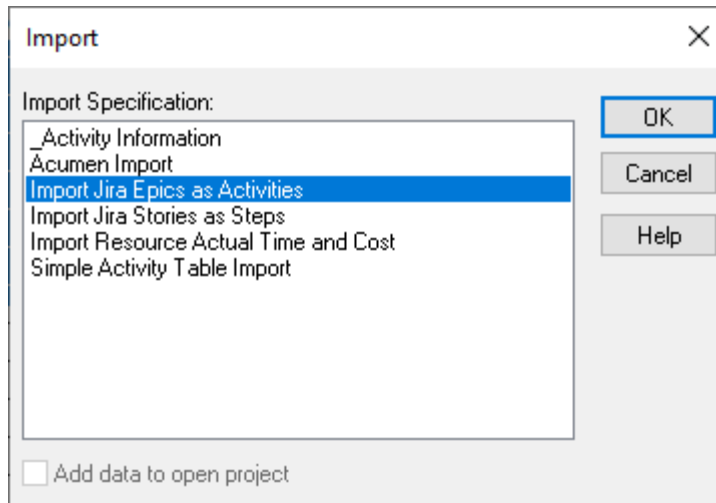
# Jira Integration

Support for quantifiable  
backup data

# OPP / Jira Integration

## Today

People are using the general import,  
to import Stories and Epics as  
activities and steps



Keep your schedule up to date with software  
status

# OPP / Jira Integration



## Jira

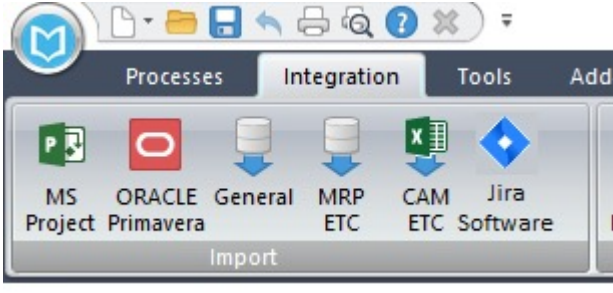
Connect to your Jira server



## Jira Projects

Select 1 or more projects to import into your Open Plan schedule

- Update existing projects
- Create new projects



Keep your schedule up to date with software status

# Deltek. Project Portfolio Management >

## Key Takeaways:

- We are here to help deliver your projects successfully
- We are listening
- We are innovating
- We are still the best solution in the market!





## We Want to Hear from You

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Your opinion matters so we kindly ask that you take a few minutes to share your product feedback with other industry peers on software review site G2.



This is an excellent tool for creating high quality schedules, managing cost and mitigating project risk for projects of any size.”

**Deltak PPM Customer**