



30 Essential Project Management KPIs

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PLAN | TRACK | MEASURE | DELIVER

30 Essential Project Management KPIs

BETTER
INSIGHTS

HIGHER
PERFORMANCE

SUCCESSFUL
PROJECTS

A Visual Guide to the Metrics
That Matter Most



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1



SCHEDULE VARIANCE (SV)



Compare the value of completed work with the value planned by the status date.

1 WHAT IT MEASURES

Schedule variance shows the gap between earned value and planned value, using the same approved scope and reporting date.



EARNED VALUE (EV):

Budgeted value of work actually completed and objectively verified.



PLANNED VALUE (PV):

Budgeted value of work scheduled to be completed by today.



POSITIVE SV:

More budgeted work completed than planned.



NEGATIVE SV:

Less budgeted work completed than planned.



UNIT:

Currency or budget units, not calendar days.



PAIR IT WITH:

Critical-path dates and remaining durations.

2 FORMULA & METHOD

$$SV = EV - PV$$

$$SV \% = (EV - PV) / PV \times 100$$



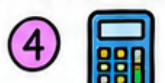
1 Set a common status date for the schedule and cost system.



2 Confirm the approved time-phased baseline.



3 Credit progress using the agreed earning rules.



4 Calculate the difference at work-package and project level.



5 Compare this period with the previous trend.



CONTROL:

PV must exceed zero for SV %. Use N/A when no work is planned.

3 DATA & EVIDENCE



BASELINE SCHEDULE:

Planned activity dates, budgets and dependencies.



PROGRESS RECORDS:

Accepted quantities, verified milestones and completion evidence.



EVM REPORT:

Time-phased PV and EV at the same cutoff.



CHANGE LOG:

Approved changes with effective dates and rationale.



OWNER CHECK:

Planner and work-package owner reconcile exceptions.



QUALITY RULE:

Do not claim progress from time spent alone. Exclude unauthorized scope from earned value.

4 WORKED EXAMPLE

Illustrative project at the monthly cutoff:

Planned value (PV): \$100,000

Earned value (EV): \$80,000

$$SV = \$80,000 - \$100,000$$

RESULT: -\$20,000

$$SV \% = -\$20,000 / \$100,000 \times 100 = -20\%$$



INTERPRETATION:

Completed work is worth \$20,000 less than planned. This does not mean the project is 20 days late.



LIMIT:

SV returns to zero when all baseline work is earned, even if the finish was late.

5 WHY IT MATTERS



EARLY WARNING:

Reveals missing planned output before the next review.



FOCUSED RECOVERY:

Identifies work packages contributing most to the shortfall.



BETTER QUESTIONS:

Separates verified progress from optimistic status updates.



TREND VISIBILITY:

Shows whether recovery is closing the gap.



DEPENDENCY AWARENESS:

Prompts a check of downstream milestones.



AVOID THE TRAP:

A favorable total can hide delays on critical activities.

6 IMPROVE & OUTPUTS



FIND THE CAUSE:

Check missing inputs, blockers, unrealistic durations and late approvals.



CHECK CRITICALITY:

Inspect the current critical and near-critical paths.



ASSIGN RECOVERY:

Give each action an owner, deadline and expected effect.



REFORECAST:

Update remaining work honestly; preserve the baseline history.



VERIFY NEXT CYCLE:

Compare actual recovery with the promised result.



USEFUL OUTPUTS:

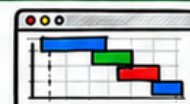
Variance narrative, recovery action log and revised milestone forecast. Set tolerances to project context; no universal threshold applies.



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COST PERFORMANCE INDEX (CPI)

Measure the budgeted value delivered for each dollar of actual cost.



1 WHAT IT MEASURES

CPI compares earned value with actual cost for the same work at the same status date.



EARNED VALUE

Budget assigned to objectively completed work.



ACTUAL COST

Cost incurred for that work, including relevant accruals.



CPI ABOVE 1

Favorable cost efficiency.



CPI BELOW 1

Unfavorable cost efficiency.



CPI EQUALS 1

Earned value matches actual cost.



BOUNDARY

This is a delivery cost indicator, not profit, cash balance or customer value.

2 FORMULA & METHOD

$$CPI = EV / AC$$

- 1 Confirm the reporting cutoff.
- 2 Verify completed work before crediting EV.
- 3 Reconcile costs and unposted accruals.
- 4 Divide EV by AC using identical scope.
- 5 Review both period and cumulative results.



CONTROL

AC must be greater than zero. Otherwise show N/A and investigate.



Combine with CV for the size of the variance and EAC for the forecast.

3 DATA & EVIDENCE



EVM RECORDS

Earned value by control account and work package.



COST LEDGER

Labor, materials, suppliers and agreed overheads.



ACCRUALS

Received work not yet invoiced or posted.



PROGRESS EVIDENCE

Accepted quantities and milestone completion.



BASELINE HISTORY

Approved budget changes and earning rules.



RECONCILIATION

Finance and delivery owners resolve mismatched dates, duplicate charges and missing costs before reporting.

4 WORKED EXAMPLE

Illustrative cumulative results:

Earned value: \$80,000

Actual cost: \$100,000



$$CPI = \$80,000 / \$100,000 = 0.80$$



READING

Each \$1 spent produced \$0.80 of budgeted work.



Cost variance = -\$20,000



If BAC = \$200,000 and current efficiency continues:

$$EAC = BAC / CPI = \$250,000$$



ASSUMPTION

This forecast assumes current cost efficiency remains representative of the remaining work.

5 WHY IT MATTERS



COST VISIBILITY

Exposes inefficient delivery before funds run out.



FORECAST INPUT

Supports a realistic estimate at completion.



TARGETED CONTROL

Locates work packages driving the overrun.



CREDIBLE REPORTING

Relates spending to actual accomplishment.



TREND REVIEW

Distinguishes one bad period from continuing decline.



AVOID THE TRAP

Delayed invoices can create a temporarily attractive CPI. A high index does not prove quality or benefits.

6 IMPROVE & OUTPUTS



VALIDATE INPUTS

Correct missing actuals and premature progress.



DIAGNOSE DRIVERS

Separate rate, productivity, scrap and rework effects.



ASSIGN ACTIONS

Give specific recovery tasks to accountable owners.



UPDATE FORECAST

Re-estimate remaining effort and supplier commitments.



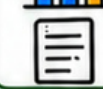
CHECK RESULTS

Compare recovery promises with the next reporting cycle.



USEFUL OUTPUTS

Cost variance narrative, CPI trend, recovery plan and revised EAC.



Review tolerances in project context.



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MILESTONE ACHIEVEMENT RATE

Track whether important commitments are completed by their agreed due dates.



1 WHAT IT MEASURES

The share of milestones due in a defined period that were achieved on or before their agreed dates.



MILESTONE

A verifiable event, decision, approval or accepted deliverable.



DUE COHORT

All milestones due within the reporting window.



ON-TIME

Evidence confirms achievement by the due date.



MISSED

Late and still-open milestones remain in the denominator.



DISTINCTION

Completion eventually is different from completion on time.

2 FORMULA & METHOD

$$\text{Rate} = \frac{\text{On-time milestones}}{\text{Milestones due}} \times 100$$

- 1 Freeze the reporting period and due-date basis.
- 2 List every milestone due in that period.
- 3 Check actual completion and acceptance evidence.
- 4 Count those completed by their agreed date.
- 5 Divide by all due milestones.



CONTROL

If none are due, report N/A. Report critical milestones separately rather than hiding them in a large total.

3 DATA & EVIDENCE



MILESTONE REGISTER

Unique ID, owner, description and due date.



ACCEPTANCE RECORD

Signed approval or an objective completion record.



BASELINE SCHEDULE

Original and approved revised dates.



CHANGE HISTORY

Why a commitment date moved and who authorized it.



DEPENDENCY LOG

Inputs required for each milestone.



QUALITY CHECK

No milestone counts as achieved just because its activity is marked 100% complete.

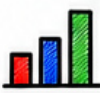
4 WORKED EXAMPLE

Illustrative month:

Milestones due:	12
Achieved by due date:	9
Completed late:	2
Still open after due date:	1

$$\text{Rate} = 9 / 12 \times 100 = 75\%$$

$$\text{Overall completion} = 11 / 12 = 91.7\%$$



READING

Delivery is mostly complete, but only three quarters of commitments were met on time.



Follow up the missed critical milestone before celebrating the overall percentage.

5 WHY IT MATTERS



COMMITMENT RELIABILITY

Shows how consistently promises are met.



GOVERNANCE

Focuses review meetings on consequential events.



DEPENDENCY CONTROL

Reveals handoffs that may delay others.



FORECAST QUALITY

Exposes recurring optimism in planning.



STAKEHOLDER TRUST

Provides an evidence-based status view.



AVOID THE TRAP

Ten small milestones cannot compensate for one missed regulatory approval or launch gate.

6 IMPROVE & OUTPUTS



DEFINE DONE

Agree acceptance criteria before work begins.



LOOK AHEAD

Review upcoming commitments and required inputs.



REMOVE BLOCKERS

Escalate missing decisions and dependencies early.



KEEP HISTORY

Record revised dates without erasing original commitments.



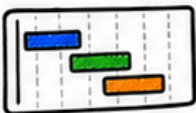
LEARN

Separate planning errors from execution failures.



USEFUL OUTPUTS

Milestone dashboard, overdue list, dependency actions and recovery dates. Use project-specific thresholds and show milestone counts alongside the rate.



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DOWNLOAD

GET LIFETIME ACCESS



SCHEDULE PERFORMANCE INDEX (SPI)

Compare budgeted work accomplished with budgeted work planned.



1 WHAT IT MEASURES

SPI measures earned-value schedule efficiency at a defined status date.



EV

Budgeted value of verified work completed.



PV

Budgeted value of work planned by that date.



ABOVE 1

More budgeted work earned than planned.



BELOW 1

Less budgeted work earned than planned.



EQUAL TO 1

Earned value equals planned value.



LIMIT

SPI measures budgeted work, not the number of calendar days ahead or behind.

2 FORMULA & METHOD

$$SPI = EV / PV$$

- 1 Use an approved time-phased baseline.
- 2 Apply consistent earning rules to progress.
- 3 Compare EV and PV at the same cutoff.
- 4 Calculate by work package and overall.
- 5 Review the trend with milestone and critical-path evidence.



CONTROL

When PV is zero, report N/A.



Traditional SPI approaches 1 when all baseline work is completed, even after a late finish.

3 DATA & EVIDENCE



BASELINE

Planned work, dates and allocated budget.



PROGRESS

Accepted deliverables or measured quantities.



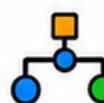
EVM SYSTEM

Matched EV and PV values.



SCHEDULE UPDATE

Actual dates and remaining durations.



CRITICAL PATH

Current logical path driving completion.



QUALITY CHECK

Do not advance progress to improve an index. Confirm that earning rules reflect genuine accomplishment rather than elapsed time or unsupported estimates.

4 WORKED EXAMPLE

Illustrative reporting date:

Planned value: \$100,000

Earned value: \$80,000

$$SPI = \$80,000 / \$100,000 = 0.80$$



READING

The project has earned 80% of the budgeted work expected by today.



Schedule variance = -\$20,000

This does not establish that the finish date is 20% late.



A noncritical package may be ahead while the activity controlling launch remains delayed.

5 WHY IT MATTERS



COMPARABILITY

Normalizes the schedule-value gap across packages.



EARLY SIGNAL

Highlights under-delivery against the plan.



TREND ANALYSIS

Shows whether delivery is catching up.



REVIEW FOCUS

Helps locate the largest shortfalls.



FORECAST DISCUSSION

Prompts evidence-based questions about remaining work.



AVOID THE TRAP

Combining packages with different budgets can mask a small but critical late activity.

6 IMPROVE & OUTPUTS



VERIFY PROGRESS

Correct optimistic estimates and missing evidence.



EXAMINE LOGIC

Check dependencies, constraints and near-critical paths.



REPLAN WORK

Resolve bottlenecks and sequence feasible recovery.



PROTECT QUALITY

Avoid rushed completion that creates rework.



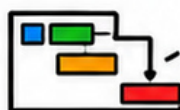
TRACK EFFECT

Recheck SPI and the forecast finish together.



USEFUL OUTPUTS

SPI trend, package variance review and milestone recovery plan. Use the current schedule to assess finish-date impact.



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COST VARIANCE (CV)

Identify the money gap between budgeted work earned and actual cost incurred.



① WHAT IT MEASURES

CV expresses cost performance in currency for the work completed at the status date.



EARNED VALUE

Approved budget attached to accomplished work.



ACTUAL COST

Incurred costs for the same scope.



POSITIVE CV

Favorable cost performance.



NEGATIVE CV

Unfavorable cost performance.



ZERO CV

Work has cost its budgeted value.



DISTINCTION

Unspent budget alone does not establish savings; the work may simply be late.

② FORMULA & METHOD

$$CV = EV - AC$$

$$CV \% = (EV - AC) / EV \times 100$$



1 Align scope and reporting dates.



2 Validate objectively earned progress.



3 Reconcile posted costs and accruals.



4 Calculate period and cumulative variance.



5 Explain the main cost drivers.



CONTROL

Use N/A for CV % when EV is zero. State the percentage convention because other reports may use a different denominator.

③ DATA & EVIDENCE



BUDGET BASELINE

Authorized budgets by work package.



COMPLETION EVIDENCE

Accepted quantities and approved progress.



COST LEDGER

Labor, materials and subcontract expenses.



ACCRUAL RECORD

Work received before invoice posting.



TIME RECORDS

Effort charged to the correct activity.



OWNER REVIEW

Finance and project control confirm the variance is real before a recovery action is assigned.

④ WORKED EXAMPLE

Illustrative package:

Earned value: \$90,000

Actual cost: \$100,000

$$CV = \$90,000 - \$100,000$$

RESULT: -\$10,000

$$CV \% = -\$10,000 / \$90,000 \times 100$$

$$= -11.1\%$$

READING



Completed work cost \$10,000 more than its budgeted value.



$$CPI = 0.90$$



Do not label the \$10,000 variance as a forecast final overrun; remaining work may perform differently.

⑤ WHY IT MATTERS



MONEY IMPACT

Shows the absolute size of a delivery overrun.



PRIORITIZATION

Directs attention to material variances.



CAUSE ANALYSIS

Separates productivity problems from rate changes.



ACCOUNTABILITY

Connects cost discussions to specific work.



FORECAST QUALITY

Supplies evidence for updating remaining estimates.



AVOID THE TRAP

A small percentage on a large package can matter more than a dramatic percentage on a tiny one.

⑥ IMPROVE & OUTPUTS



RECONCILE

Check duplicate charges, coding errors and missing accruals.



EXPLAIN

Analyze labor rate, effort, procurement and rework causes.



ACT

Assign feasible corrective actions with owners.



FORECAST

Update EAC without erasing the baseline variance.



FOLLOW THROUGH

Confirm actions produce measurable improvement.



USEFUL OUTPUTS

Cost variance bridge, recovery actions and updated forecast assumptions. Show both absolute and relative variance.



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BUDGET UTILIZATION RATE



Show how much approved budget has been consumed by the reporting date.



1 WHAT IT MEASURES

Budget utilization expresses incurred cost as a share of the defined approved budget.



NUMERATOR

Actual incurred project cost at the cutoff.



DENOMINATOR

The stated approved budget scope.



CUMULATIVE VIEW

Total spend since the project began.



PERIOD VIEW

Spend within a clearly stated window.



BOUNDARY

Utilization measures consumption, not cost efficiency.



PAIR IT WITH

Earned progress, commitments and the latest completion forecast.

2 FORMULA & METHOD

$$\text{Utilization} = \frac{\text{Actual cost}}{\text{Approved budget}} \times 100$$

- 1 Define which budget is included.
- 2 Specify treatment of reserves and taxes.
- 3 Reconcile actuals and accruals.
- 4 Divide by the matching approved budget.
- 5 Compare against time-phased planned expenditure.



CONTROL

A zero budget produces N/A.



Keep incurred cost, cash payments and committed future spend separate to avoid double counting.

3 DATA & EVIDENCE



APPROVED BUDGET

Version, scope and authorizing decision.



FINANCIAL LEDGER

Costs incurred to the reporting date.



ACCRUALS

Goods and services received but not posted.



COMMITMENTS

Purchase orders and contracts still outstanding.



SPEND PLAN

Expected timing of expenditure.



DELIVERY STATUS

Objective completion evidence.



QUALITY CHECK

A purchase order is not automatically an actual cost; follow the agreed accounting basis.

4 WORKED EXAMPLE

Illustrative project:

Approved budget: \$200,000

Actual cost: \$90,000

$$\text{Utilization} = \frac{\$90,000}{\$200,000} \times 100 = 45\%$$

Budget not yet consumed: \$110,000



If earned progress is only 30%, investigate whether spending is advancing faster than output.



If progress is 60%, check whether invoices or accruals are missing before concluding that delivery is efficient.

5 WHY IT MATTERS



FUNDING VISIBILITY

Highlights the pace of budget consumption.



CASH PLANNING

Informs a separate forecast of payment needs.



COMMITMENT REVIEW

Helps reveal limited room for new obligations.



TIMING CONTROL

Compares expenditure with the approved plan.



SPONSOR DISCUSSION

Supports decisions on funding and scope.



AVOID THE TRAP

Low utilization may indicate late delivery, blocked procurement or missing cost records rather than savings.

6 IMPROVE & OUTPUTS



RECONCILE COSTS

Resolve missing postings and accrual estimates.



CHECK PROGRESS

Compare spending with accepted output.



REVIEW OBLIGATIONS

Forecast remaining contractual commitments.



REASSESS TIMING

Update the spend profile as work changes.



ESCALATE EARLY

Flag forecast funding gaps before approval deadlines.



USEFUL OUTPUTS

Budget consumption report, commitment register and funding forecast.



A healthy utilization rate depends on project stage.



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30 Essential Project Management KPIs



ESTIMATE AT COMPLETION (EAC)

Forecast the total cost required to finish the currently authorized project scope.



1 WHAT IT MEASURES

EAC combines what the project has already cost with a realistic forecast of remaining cost.



ACTUAL COST (AC)

Cost already incurred.



ESTIMATE TO COMPLETE (ETC)

Forecast cost of unfinished work.



BUDGET AT COMPLETION (BAC)

Approved budget for the baseline scope.



FORECAST

A current expectation, not a new authorization.



BOUNDARY

Keep scope and cost basis consistent when comparing EAC with BAC.

2 FORMULA & METHOD



General:

$$EAC = AC + ETC$$



Current efficiency continues:

$$EAC = BAC / CPI$$



Remaining work at budget rate:

$$EAC = AC + (BAC - EV)$$



BOTTOM-UP METHOD

Re-estimate remaining quantities, rates, resources and supplier costs.



Select a method that fits the evidence; record why.



CONTROL

Do not use BAC / CPI when CPI is zero or not meaningful. State assumptions and uncertainty.

3 DATA & EVIDENCE



ACTUAL COSTS

Reconciled ledger and accruals.



REMAINING SCOPE

Verified unfinished activities and deliverables.



RESOURCE PLAN

Future effort, rates and availability.



SUPPLIER FORECASTS

Commitments, claims and remaining purchases.



SCHEDULE FORECAST

Timing effects on labor and overhead.



RISK ASSUMPTIONS

Include defined allowances consistently and avoid double counting.



Keep a dated record of forecast changes and owner review.

4 WORKED EXAMPLE

Illustrative project:

BAC = \$200,000

EV = \$80,000; AC = \$100,000

CPI = 0.80

If current efficiency continues:

$$EAC = \$200,000 / 0.80 \\ = \$250,000$$

If the remaining work costs its original budget:

$$EAC = \$100,000 + \$120,000 \\ = \$220,000$$

Different assumptions produce different forecasts. Choose and justify the scenario supported by remaining-work evidence.

5 WHY IT MATTERS



EARLY FUNDING ACTION

Reveals likely cost pressure before completion.



HONEST FORECASTING

Separates the original plan from current reality.



SCENARIO COMPARISON

Shows the impact of recovery assumptions.



DECISION SUPPORT

Informs scope, sourcing and resource choices.



TREND LEARNING

Explains why expectations change.



AVOID THE TRAP

An unchanged EAC is not credible if delivery conditions have materially deteriorated.

6 IMPROVE & OUTPUTS



REBUILD ETC

Ask owners for evidence on the remaining work.



TEST ASSUMPTIONS

Challenge optimistic productivity or price estimates.



RECONCILE

Ensure no commitments or accruals are counted twice.



REVIEW RISKS

Explain exposure and forecast sensitivity.



APPROVE ACTIONS

Escalate funding needs through governance.



USEFUL OUTPUTS

EAC range, assumptions log, forecast bridge and funding request.



Show forecast uncertainty instead of false precision.



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30 Essential Project Management KPIs



VARIANCE AT COMPLETION (VAC)

Compare the approved budget with the latest forecast of total project cost.



1 WHAT IT MEASURES

VAC is the expected difference between the budget at completion and the estimate at completion.



BAC: Approved budget for the baseline scope.



EAC: Current forecast total cost for the same scope.



POSITIVE VAC: Forecast underspend.



NEGATIVE VAC: Forecast overrun.



ZERO VAC: Forecast aligns with the budget.



BOUNDARY: VAC is forward-looking. Cost variance describes performance on work already accomplished.

2 FORMULA & METHOD

$$VAC = BAC - EAC$$

$$VAC \% = (BAC - EAC) / BAC \times 100$$



1 Confirm the approved budget version.



2 Validate the current EAC and assumptions.



3 Align both values to identical scope.



4 Calculate absolute and percentage variance.



5 Explain movements since the previous forecast.



CONTROL:

Use N/A for VAC % when BAC is zero. An EAC change does not automatically authorize more budget.

3 DATA & EVIDENCE



BUDGET BASELINE:

Authorized scope, budget and reserve treatment.



CURRENT EAC:

Actual costs plus credible remaining estimates.



FORECAST HISTORY:

Previous values and explanations for changes.



CHANGE CONTROL:

Approved additions, deletions and transfers.



RISK REVIEW:

Cost uncertainty and relevant exposure.



OWNER SIGN-OFF:

Finance and delivery leaders validate the forecast basis before presenting the variance.

4 WORKED EXAMPLE

Illustrative project:

BAC = \$200,000

EAC = \$250,000

VAC = \$200,000 - \$250,000

RESULT: -\$50,000

VAC % = $-\$50,000 / \$200,000 \times 100$
= -25%

READING: The project is forecast to exceed its budget by \$50,000, or 25% of BAC.

If a credible recovery reduces EAC to \$235,000, VAC improves to -\$35,000; it is still an expected overrun.

5 WHY IT MATTERS



SPONSOR VISIBILITY:

Makes the expected financial gap explicit.



FUNDING TIMING:

Allows decisions before budget limits are reached.



RECOVERY TRACKING:

Shows whether actions improve the forecast.



OPTION COMPARISON:

Connects scope or sourcing decisions to cost.



GOVERNANCE:

Separates forecast accountability from budget authorization.



AVOID THE TRAP:

A favorable VAC can reflect omitted scope or unrealistic remaining estimates rather than genuine savings.

6 IMPROVE & OUTPUTS



VERIFY COMPARABILITY:

Reconcile scope, rates and reserve conventions.



CHALLENGE EAC:

Test remaining effort and supplier assumptions.



COMPARE OPTIONS:

Assess cost, schedule, quality and benefit effects.



SEEK DECISIONS:

Escalate forecast overruns with clear choices.



TRACK RECOVERY:

Record expected and realized savings separately.



USEFUL OUTPUTS:

Forecast variance report, funding gap, recovery scenarios and decision log.



Explain uncertainty around the forecast.



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30 Essential Project Management KPIs



TO-COMPLETE PERFORMANCE INDEX



Test the cost efficiency needed on remaining work to meet a chosen cost target.



1 WHAT IT MEASURES

TCPI compares budgeted work remaining with the money remaining to reach a target.



WORK REMAINING
BAC minus EV.



MONEY REMAINING
Target total cost minus AC.



TARGET BAC
Efficiency required to finish within the approved budget.



TARGET EAC
Efficiency required to achieve the current forecast.



INTERPRETATION
A higher result requires more future efficiency.



Compare the requirement with demonstrated performance and feasible improvement.

2 FORMULA & METHOD

$$TCPI(BAC) = (BAC - EV) / (BAC - AC)$$

$$TCPI(EAC) = (BAC - EV) / (EAC - AC)$$

- 1 Name the target clearly.
- 2 Validate BAC, EV and AC at the same cutoff.
- 3 Calculate remaining work and available money.
- 4 Compare TCPI with the recent and cumulative CPI.



CONTROL

If the denominator is zero or negative, the target is exhausted or exceeded; a normal ratio is not meaningful.

3 DATA & EVIDENCE



EVM VALUES

Consistent BAC, EV and AC for authorized scope.



CURRENT FORECAST

Validated EAC and remaining assumptions.



PERFORMANCE HISTORY

Actual productivity and cost efficiency.



RECOVERY PLAN

Specific changes expected to improve future results.



REMAINING-WORK MIX

Different activities may have different efficiency potential.



QUALITY CHECK

An impressive future target is not evidence that the team can achieve it.

4 WORKED EXAMPLE

Illustrative project:

BAC = \$200,000; EV = \$80,000

AC = \$100,000; EAC = \$250,000

$$TCPI(BAC) = \$120,000 / \$100,000 = 1.20$$

$$TCPI(EAC) = \$120,000 / \$150,000 = 0.80$$

Current CPI = 0.80



READING

The original budget requires 1.20 of budgeted work per remaining dollar; the revised forecast requires 0.80.



The improvement needed for BAC must be justified.

5 WHY IT MATTERS



REALITY CHECK

Tests whether a cost target remains plausible.



FORECAST CHALLENGE

Reveals assumptions hidden inside EAC.



RECOVERY CLARITY

Quantifies the required performance change.



DECISION SUPPORT

Helps compare revised funding scenarios.



EARLY ESCALATION

Flags targets that have become unrealistic.



AVOID THE TRAP

A large gap between TCPI and CPI is a discussion trigger, not an automatic universal pass-fail rule.

6 IMPROVE & OUTPUTS



EXAMINE THE GAP

Identify why future performance should improve.



TEST CAPACITY

Check skills, rates, equipment and supplier conditions.



BUILD SCENARIOS

Compare achievable ETC estimates with target costs.



AGREE ACTIONS

Link recovery assumptions to named owners.



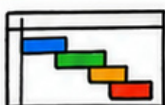
REVIEW EACH CYCLE

Compare required efficiency with actual results.



USEFUL OUTPUTS

Target-feasibility note, revised ETC, recovery commitments and funding decisions.



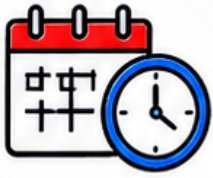
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CARD 9 OF 30

30 Essential Project Management KPIs



PLANNED VS ACTUAL DURATION



Compare completed activity durations with their approved planned durations.



1 WHAT IT MEASURES

Duration variance shows how long a completed activity took compared with its planned duration.



PLANNED DURATION

Approved working time expected for the activity.



ACTUAL DURATION

Observed time between actual start and finish using the agreed calendar.



POSITIVE VARIANCE

Activity took longer than planned.



NEGATIVE VARIANCE

Activity finished in less time.



DISTINCTION

Duration is not labor effort; five people working one day is not five elapsed days.

2 FORMULA & METHOD

Variance = Actual duration - Planned duration

Variance % = Variance / Planned duration x 100



1 Select completed, comparable activities.



2 Use the same working-day or calendar-day basis.



3 Verify actual start and finish dates.



4 Calculate duration differences.



5 Segment by work type and complexity.



CONTROL

Zero-duration milestones need date variance instead. Report forecasts for unfinished work separately.

3 DATA & EVIDENCE



BASELINE SCHEDULE

Approved activity durations and calendars.



ACTUAL DATES

Verified start, finish and completion evidence.



WORKING CALENDAR

Weekends, holidays and shift rules.



PAUSE RECORD

Waiting periods and approved suspension treatment.



SCOPE CHANGES

Changes that altered the activity's work.



QUALITY CHECK

Document counting conventions so the same start and finish dates produce the same reported duration.

4 WORKED EXAMPLE

Illustrative completed activity:

Planned duration: 10 working days

Actual duration: 13 working days

Variance = 13 - 10 = +3 days

Variance % = 3 / 10 x 100 = +30%



READING

The activity took 30% longer than planned.



If it started early and had sufficient float, the project finish may still be unchanged.



Check dependency effects before declaring a project-level delay.

5 WHY IT MATTERS



ESTIMATING FEEDBACK

Improves future duration assumptions.



BOTTLENECK DISCOVERY

Exposes approval or waiting delays.



PRODUCTIVITY DISCUSSION

Identifies recurring execution difficulties.



PLANNING REALISM

Tests whether standard durations fit actual work.



LESSONS LEARNED

Connects variance to repeatable causes.



AVOID THE TRAP

Averaging unlike activities can conceal large delays in the work that controls completion.

6 IMPROVE & OUTPUTS



CLASSIFY CAUSES

Separate waiting, rework, capacity and scope effects.



UPDATE ESTIMATES

Use comparable historical evidence.



REMOVE WAITING

Clarify handoffs and approval ownership.



CHECK DEPENDENCIES

Evaluate effects on downstream work.



PRESERVE BASELINES

Keep original and revised durations traceable.



USEFUL OUTPUTS

Duration variance log, estimating library and schedule improvement actions. Show outliers alongside the average.



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CARD 10 OF 30

30 Essential Project Management KPIs





TASK COMPLETION RATE

Measure completed work items within a clearly defined task population.



1 WHAT IT MEASURES

The share of tasks meeting the agreed definition of done within a selected population.



DEFINED COHORT

A sprint, phase, work package or fixed reporting-period plan.



DONE

Completion evidence and required quality checks are satisfied.



OPEN

Started or nearly finished tasks do not count as complete.



UNWEIGHTED COUNT

Every task counts equally unless a separate weighting method is stated.



BOUNDARY

More completed tasks does not automatically mean more value delivered.

2 FORMULA & METHOD

Completion rate = $\frac{\text{Completed tasks}}{\text{Tasks in the defined cohort}} \times 100$

- 1 Freeze the population and cutoff.
- 2 Agree a consistent definition of done.
- 3 Verify completed status and evidence.
- 4 Count completed and total tasks.
- 5 Record additions, cancellations and carryover.



CONTROL

A zero-sized cohort produces N/A.



To measure on-time completion, use tasks due and completed by their deadlines instead.

3 DATA & EVIDENCE



TASK REGISTER

Unique ID, owner, scope and status.



PERIOD PLAN

The agreed task population at the start.



COMPLETION RECORD

Review or acceptance evidence.



CHANGE LOG

Added, split, removed or cancelled work.



DEPENDENCIES

Blocked tasks and missing prerequisites.



QUALITY CHECK

Prevent duplicate items and status changes made only to improve the percentage. Keep cancelled work visible.

4 WORKED EXAMPLE

Illustrative phase plan:

Tasks in the fixed cohort: 40

Tasks meeting done criteria: 30

$$\text{Rate} = 30 / 40 \times 100 = 75\%$$

Ten remaining tasks include two critical integrations.



READING

Three quarters of task count is complete; this is not proof that 75% of effort, cost or business value is delivered.

Report the two critical unfinished tasks beside the headline rate.

5 WHY IT MATTERS



WORK VISIBILITY

Shows remaining workload at a glance.



TEAM COORDINATION

Supports focused daily or weekly review.



BOTTLENECK CONTROL

Highlights accumulation of unfinished tasks.



FOLLOW-THROUGH

Connects commitments with verified completion.



PLANNING FEEDBACK

Reveals overcommitment across periods.



AVOID THE TRAP

Splitting easy work into many small tasks can inflate the metric without increasing meaningful delivery.

6 IMPROVE & OUTPUTS



RIGHT-SIZE WORK

Break tasks into useful, verifiable units.



LIMIT STARTING

Finish existing work before opening more.



CLEAR BLOCKERS

Assign owners to missing inputs and decisions.



PROTECT DONE

Include required review and acceptance steps.



SHOW CONTEXT

Pair count with criticality, age and effort estimates.



USEFUL OUTPUTS

Completion dashboard, carryover list, blocker log and next-period plan.



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CARD 11 OF 30

30 Essential Project Management KPIs



CRITICAL PATH DELAY



Track forecast finish slippage and identify the activities currently driving it.

① WHAT IT MEASURES

This card uses forecast project finish variance as the headline measure of delay, then investigates the current critical path.



BASELINE FINISH

Approved target completion date.



FORECAST FINISH

Current calculated completion date.



CRITICAL PATH

Logic-linked activities driving the finish.



NEAR-CRITICAL WORK

Paths with little remaining float.



BOUNDARY

Do not add every delayed activity together; delays can overlap or be absorbed by float.

② FORMULA & METHOD

$$\text{Finish variance} = \text{Forecast finish date} - \text{Baseline finish date}$$

Use a stated calendar-day or working-day convention.

- ① Update actual progress and remaining durations.
- ② Validate dependencies and calendars.
- ③ Recalculate the schedule and driving path.
- ④ Compare forecast and baseline finish.
- ⑤ Identify the specific drivers of movement.



CONTROL

Constraints, broken logic or invalid calendars can produce a misleading critical path.

③ DATA & EVIDENCE



INTEGRATED SCHEDULE

Activities, logic, calendars and milestones.



STATUS UPDATE

Verified actual dates and realistic remaining work.



BASELINE

Approved finish date and version history.



FLOAT REPORT

Total float and near-critical paths.



DEPENDENCY REGISTER

External inputs and owner commitments.



QUALITY CHECK

Challenge hard constraints and disconnected activities; confirm that the displayed driving path genuinely explains the finish forecast.

④ WORKED EXAMPLE

Illustrative calendar-day convention:

Baseline finish: 30 June
Current forecast finish: 8 July
Finish variance: +8 calendar days

A late component delivery adds five days and a subsequent test sequence adds three.



READING

The current schedule forecasts eight days of finish slippage.



Check the logic before attributing the full delay to one activity or assuming all local delays are additive.

⑤ WHY IT MATTERS



LAUNCH VISIBILITY

Shows the current threat to completion commitments.



FOCUSED RECOVERY

Prioritizes work that can change the finish.



RESOURCE DECISIONS

Directs scarce capacity to consequential tasks.



DEPENDENCY CONTROL

Makes external handoff risks visible.



SCENARIO ANALYSIS

Tests recovery options before commitment.



AVOID THE TRAP

Accelerating a noncritical activity may add cost without improving the project finish.

⑥ IMPROVE & OUTPUTS



VALIDATE LOGIC

Repair missing or unrealistic dependencies.



REMOVE BLOCKERS

Secure critical inputs and approvals.



TEST OPTIONS

Evaluate resequencing, extra capacity and scope tradeoffs.



CHECK SIDE EFFECTS

Include quality, safety and cost implications.



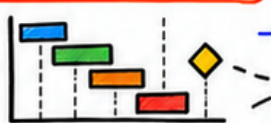
MONITOR PATH SHIFTS

Recovery can make another path critical.



USEFUL OUTPUTS

Driving-path narrative, recovery scenario and revised finish forecast. Keep baseline changes governed.



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CARD 12 OF 30

30 Essential Project Management KPIs



SCOPE CHANGE RATE



Track how much of the baseline deliverable set is affected by approved change.



1 WHAT IT MEASURES

Scope change rate has several possible definitions. This card uses the share of baseline deliverables affected by approved scope changes in a period.



BASELINE SET

Deliverables approved at the chosen starting point.



AFFECTED ITEM

A baseline deliverable changed or removed through approved control.



COUNT ONCE

Multiple changes to one item count as one affected deliverable.



ADDITIONS

Track new deliverables separately; they were not in the original set.

2 FORMULA & METHOD

$$\text{Rate} = \frac{\text{Distinct baseline deliverables affected}}{\text{Baseline deliverables}} \times 100$$

- 1 Freeze the baseline and reporting period.
- 2 Link each approved change to affected deliverable IDs.
- 3 Count distinct affected baseline items.
- 4 Divide by the original baseline population.
- 5 Report new additions and impact separately.



CONTROL

With no baseline deliverables, report N/A. Do not mix change-request count with deliverable count.

3 DATA & EVIDENCE



SCOPE BASELINE

Agreed deliverables, exclusions and acceptance criteria.



WBS DICTIONARY

Stable identifiers and work descriptions.



CHANGE LOG

Approval date, reason, owner and affected items.



IMPACT ANALYSIS

Cost, schedule, quality and benefit consequences.



VERSION HISTORY

Traceable before-and-after scope.



QUALITY CHECK

Distinguish approved changes from proposed requests, clarification and unauthorized work.

4 WORKED EXAMPLE

Illustrative reporting period:

Baseline deliverables: 40

Six approved requests affect eight distinct baseline deliverables.

$$\text{Rate} = 8 / 40 \times 100 = 20\%$$

Three new deliverables are also approved and reported separately.



READING

One fifth of the original deliverable set changed.



The percentage does not show effort impact; one changed integration may be larger than several minor document changes.

5 WHY IT MATTERS



SCOPE VISIBILITY

Makes baseline movement explicit.



PLANNING FEEDBACK

Reveals unclear requirements or changing needs.



CAPACITY CONTROL

Connects new work with resource decisions.



GOVERNANCE

Confirms that scope changes follow approval routes.



EXPECTATION MANAGEMENT

Explains why plans and commitments move.



AVOID THE TRAP

A high change rate is not automatically bad; valuable learning can justify a deliberate change.

6 IMPROVE & OUTPUTS



CLARIFY EARLY

Improve discovery and acceptance criteria.



ASSESS IMPACT

Evaluate all affected dependencies and commitments.



APPROVE EXPLICITLY

Record who accepted the tradeoffs.



UPDATE PLANS

Revise authorized scope, schedule and budget consistently.



REVIEW CAUSES

Separate useful adaptation from avoidable churn.



USEFUL OUTPUTS

Scope movement report, change impact summary and updated baseline traceability.



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CARD 13 OF 30

30 Essential Project Management KPIs



REQUIREMENTS STABILITY INDEX

Measure how much of the original requirement set remains unchanged.



1 WHAT IT MEASURES

This card defines stability as the percentage of baseline requirements that have neither changed nor been deleted since the baseline date.



BASELINE REQUIREMENT

A uniquely identified approved requirement.



UNCHANGED

Meaning and acceptance criteria remain intact.



CHANGED OR DELETED

Count each affected baseline ID once.



NEW REQUIREMENTS

Report additions separately.



BOUNDARY

Stable requirements can still be wrong; stability is not proof of quality or customer fit.

2 FORMULA & METHOD

$$RSI = \frac{\text{Unchanged baseline requirements}}{\text{Baseline requirements}} \times 100$$

$$\text{Equivalent: } RSI = \frac{(B - U)}{B} \times 100$$

B = baseline count

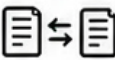
U = distinct baseline IDs changed or deleted

1



Freeze the baseline set.

2



Compare current versions with baseline versions.

3



De-duplicate changed IDs.

4



Calculate the unchanged share.



CONTROL

If B is zero, report N/A. State this definition because alternative indices exist.

3 DATA & EVIDENCE



REQUIREMENTS REGISTER

IDs, owners and approved wording.



VERSION HISTORY

What changed and when.



CHANGE APPROVALS

Authorized additions, deletions and revisions.



TRACEABILITY MATRIX

Links to design, tests and deliverables.



ACCEPTANCE CRITERIA

Evidence needed to satisfy each requirement.



QUALITY CHECK

Distinguish editorial corrections from substantive changes using a documented rule applied consistently across the project.

4 WORKED EXAMPLE

Illustrative baseline:

Original requirements: 100

Distinct baseline requirements changed or deleted: 15

Unchanged requirements: 85



$$RSI = 85 / 100 \times 100 = 85\%$$



Ten new requirements were added and are reported separately.



READING

85% of the original set is unchanged. The current total requirement count is a different measure and should not replace the original denominator.

5 WHY IT MATTERS



PLANNING CONFIDENCE

Shows how much the original work definition moves.



REWORK WARNING

Reveals repeated changes to designed or tested work.



DISCOVERY FEEDBACK

Highlights unresolved needs and assumptions.



TRACEABILITY

Helps identify downstream impacts.



GOVERNANCE

Encourages explicit decisions about changing commitments.



AVOID THE TRAP

Driving stability to 100% can discourage necessary learning or valuable customer feedback.

6 IMPROVE & OUTPUTS



VALIDATE EARLY

Review needs and acceptance criteria with users.



PROTOTYPE RISKS

Test uncertain requirements before expensive delivery.



ASSESS IMPACTS

Trace changes through design, build and testing.



REVIEW CHURN

Identify repeatedly changing requirements and root causes.



KEEP LEARNING

Accept beneficial changes through clear governance.



USEFUL OUTPUTS

Stability trend, changed-requirement list, impact analysis and validation actions.



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CARD 14 OF 30

30 Essential Project Management KPIs





DEFECT DENSITY



Compare confirmed defects with a clearly defined amount of inspected output.

1 WHAT IT MEASURES

Defect density relates the number of confirmed defects to the size of an inspected or tested output.



DEFECT

A verified failure to meet a specified requirement.



OUTPUT UNIT

A stated measure such as tested components, units or thousands of lines of code.



COHORT

A defined release, batch or deliverable set.



SEVERITY

Report critical and minor defects separately.



BOUNDARY

Counts depend on testing depth, reporting rules and the chosen size unit.

2 FORMULA & METHOD

$$\text{Density} = \frac{\text{Confirmed defects}}{\text{Output size}}$$

- 1 Define the product cohort and test window.
- 2 Choose one consistent size measure.
- 3 Remove duplicate and rejected reports.
- 4 Count confirmed defects in that cohort.
- 5 Divide and label the unit explicitly.



CONTROL

Zero output size gives N/A.



Do not compare different product types or size conventions as if they were directly equivalent.

3 DATA & EVIDENCE



DEFECT REGISTER

Unique ID, severity, status and confirmed cause.



TEST RECORDS

Coverage, environment and test conditions.



OUTPUT INVENTORY

Verified units or agreed size measure.



RELEASE BASELINE

Exact version being assessed.



TRIAGE DECISIONS

Duplicate, rejected and confirmed classifications.



QUALITY CHECK

Record whether reopened defects retain the same ID and how defects discovered after release are treated.

4 WORKED EXAMPLE

Illustrative inspected batch:

Confirmed defects:	24
Components inspected:	120

$$\text{Density} = 24 / 120 = 0.20 \text{ defects per component}$$

This can also be stated as 20 defects per 100 components.



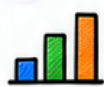
READING

The result counts defects, not defective components; one component may contain several defects.



A 20% defective-component rate cannot be inferred from this density.

5 WHY IT MATTERS



QUALITY TREND

Shows concentration of confirmed problems.



TARGETED TESTING

Identifies components needing deeper review.



PROCESS FEEDBACK

Reveals recurring design or production weaknesses.



RELEASE DISCUSSION

Supports decisions alongside severity and coverage.



COMPARABLE LEARNING

Helps compare similar batches using identical rules.



AVOID THE TRAP

A lower density can result from weaker testing rather than better quality.

6 IMPROVE & OUTPUTS



CHECK SEVERITY

Prioritize critical defects regardless of the average.



ANALYZE CAUSES

Group defects by origin and recurring failure mode.



PREVENT RECURRENCE

Improve reviews, standards and automated checks.



VERIFY FIXES

Retest corrections and nearby affected behavior.



TRACK COVERAGE

Interpret density with inspection depth.



USEFUL OUTPUTS

Defect profile, root-cause actions, retest evidence and release recommendation. Set context-specific quality thresholds.



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CARD 15 OF 30

30 Essential Project Management KPIs



FIRST-PASS ACCEPTANCE RATE

Track deliverables accepted on their first review without corrective resubmission.



1 WHAT IT MEASURES

The percentage of first-reviewed deliverables accepted immediately without required correction or rework.



FIRST REVIEW

The initial formal review of a distinct deliverable.



ACCEPTED

All mandatory acceptance criteria are satisfied.



REWORK

Corrections required before approval.



FIXED COHORT

Deliverables receiving their first decision in the period.



DISTINCTION

Eventual customer acceptance can be high even when first-pass performance is poor.

2 FORMULA & METHOD

$$\text{Rate} = \frac{\text{Accepted at first review}}{\text{Deliverables first-reviewed}} \times 100$$

1

Define acceptance and conditional acceptance rules.

2

Count each distinct deliverable once.

3

Identify the first formal review decision.

4

Count those accepted without mandatory correction.

5

Segment by deliverable type and supplier.



CONTROL

No first reviews means N/A.



Exclude later resubmissions from the denominator for this first-pass measure.

3 DATA & EVIDENCE



ACCEPTANCE CRITERIA

Agreed requirements before submission.



REVIEW REGISTER

Deliverable ID, reviewer and first decision date.



DECISION RECORD

Accepted, rejected or corrections required.



VERSION HISTORY

Original submission and subsequent changes.



REWORK LOG

Required fixes and their causes.



QUALITY CHECK

Define whether minor administrative comments affect acceptance, and apply the rule consistently.

4 WORKED EXAMPLE

Illustrative review period:

Distinct deliverables first-reviewed: 25

Accepted without mandatory corrections: 20

$$\text{Rate} = \frac{20}{25} \times 100 = 80\%$$

Five require rework and resubmission.



READING

Four in five deliverables passed the first formal review.



Even if all 25 are eventually accepted, the first-pass rate remains 80% for this cohort; later success should not rewrite the initial result.

5 WHY IT MATTERS



RIGHT-FIRST-TIME SIGNAL

Shows whether requirements are understood.



REWORK CONTROL

Reveals preventable correction demand.



CYCLE-TIME IMPACT

Highlights review loops delaying delivery.



SUPPLIER FEEDBACK

Identifies recurring submission-quality issues.



CUSTOMER CONFIDENCE

Encourages reliable, review-ready output.



AVOID THE TRAP

Relaxing acceptance criteria merely to increase the rate can transfer defects to operations.

6 IMPROVE & OUTPUTS



AGREE CRITERIA

Confirm what acceptance means before production.



USE CHECKLISTS

Perform a focused readiness review before submission.



CALIBRATE REVIEWERS

Align interpretation of requirements.



ANALYZE REJECTIONS

Separate unclear criteria from execution defects.



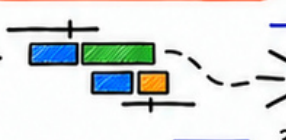
CLOSE THE LOOP

Feed common issues into training and process changes.



USEFUL OUTPUTS

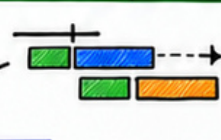
First-pass trend, rejection causes, readiness checklist and improvement actions.



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30 Essential Project Management KPIs



REWORK RATE



Measure the share of effort spent correcting or repeating previously completed work.



1 WHAT IT MEASURES

Rework rate shows how much recorded delivery effort is consumed by correction rather than first-time execution.



REWORK HOURS

Time spent fixing nonconforming or incorrectly completed work.



TOTAL HOURS

All recorded delivery effort in the same scope and period, including rework.



PLANNED ITERATION

Intended design exploration is not automatically rework.



SCOPE CHANGE

Additional approved work should be classified separately.



BOUNDARY

Use consistent effort categories before comparing teams.

2 FORMULA & METHOD

$$\text{Rework rate} = \frac{\text{Rework hours}}{\text{Total delivery hours}} \times 100$$

- 1 Agree a practical rework definition.
- 2 Assign clear time-recording categories.
- 3 Validate corrective effort with defect or rejection records.
- 4 Sum matched-period hours.
- 5 Review by cause, phase and work type.



CONTROL

Zero total hours gives N/A.

Avoid counting the same correction under multiple work packages.

3 DATA & EVIDENCE



TIME RECORDS

Hours charged to original work and correction.



DEFECT LOG

Problems triggering corrective work.



REVIEW DECISIONS

Rejections and mandatory changes.



CHANGE REGISTER

Approved new scope and planned iteration.



ROOT-CAUSE RECORDS

Where the failure originated.



QUALITY CHECK

Make reporting safe and consistent; punitive comparisons encourage people to hide correction time in ordinary delivery codes.

4 WORKED EXAMPLE

Illustrative month:

Total delivery hours: 1,000
Included rework hours: 120
Rate = $120 / 1,000 \times 100 = 12\%$
First-time delivery effort: 880 hours



READING

Twelve percent of recorded delivery effort went to correction.



If 40 rework hours arose from one unclear requirement, fixing that requirement process may be more valuable than pushing all staff to work faster.

5 WHY IT MATTERS



HIDDEN COST

Makes correction effort visible.



CAPACITY PLANNING

Explains why apparent staffing does not produce expected output.



QUALITY LEARNING

Connects failures with their upstream causes.



SCHEDULE PROTECTION

Reveals recurring work that consumes delivery time.



PROCESS IMPROVEMENT

Helps prioritize prevention investments.



AVOID THE TRAP

A falling reported rate may reflect changed time coding or underreporting.

6 IMPROVE & OUTPUTS



VALIDATE NEEDS

Resolve ambiguity before expensive execution.



REVIEW EARLY

Detect errors close to their point of creation.



STANDARDIZE CHECKS

Improve checklists and quality criteria.



FIX ROOT CAUSES

Address systemic issues instead of repeating patches.



VERIFY BENEFIT

Track whether prevention reduces both defects and rework.



USEFUL OUTPUTS

Rework trend, cause analysis, capacity impact and prevention backlog.



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CARD 17 OF 30

30 Essential Project Management KPIs



RISK EXPOSURE SCORE



Prioritize uncertain threats using an explicitly defined probability-impact scale.

1 WHAT IT MEASURES

A qualitative risk score combines assessed likelihood and impact to prioritize attention.



PROBABILITY RATING

An agreed likelihood category, such as 1 to 5.



IMPACT RATING

A defined severity category, such as 1 to 5.



INHERENT SCORE

Exposure before the planned response.



RESIDUAL SCORE

Exposure expected after the response.



BOUNDARY

Ordinal rating scores are priority aids, not expected dollars or precise probabilities.

2 FORMULA & METHOD

Illustrative scoring rule:

$$\text{Score} = \text{Probability rating} \times \text{Impact rating}$$

- 1 Define category descriptions and impact criteria.
- 2 Assess each threat with evidence and owner input.
- 3 Apply the agreed matrix and escalation rules.
- 4 Record both initial and residual assessments.
- 5 Reassess after conditions or responses change.



CONTROL

Do not treat ordinal scores as a financial total or assume a score of 20 is twice the risk of 10.

3 DATA & EVIDENCE



RISK REGISTER

Cause, uncertain event and potential consequence.



RATING SCALES

Agreed probability and impact descriptions.



OWNER EVIDENCE

Data, assumptions and expert judgments.



RESPONSE PLAN

Actions, deadlines and expected effects.



TRIGGERS

Observable signs that exposure is increasing.



QUALITY CHECK

Use consistent criteria and avoid mixing cost, schedule and safety impacts without an agreed aggregation rule.

4 WORKED EXAMPLE

Illustrative 1-to-5 scales:

Probability rating: 4

Impact rating: 5



Initial score = $4 \times 5 = 20$

After a credible mitigation, probability rating falls to 2 while impact remains 5.



Residual score = $2 \times 5 = 10$



READING

The threat moves to a lower priority category under this project's matrix.



These scores do not establish monetary expected loss.

5 WHY IT MATTERS



PRIORITIZATION

Directs attention to consequential uncertainty.



RESPONSE PLANNING

Helps assign proportionate action.



ESCALATION

Makes high-exposure threats visible to decision-makers.



TREND REVIEW

Shows changing assessments and assumptions.



OWNERSHIP

Connects threats with accountable people.



AVOID THE TRAP

Rare catastrophic threats may need action even when a simple matrix gives them a modest score.

6 IMPROVE & OUTPUTS



CLARIFY THE EVENT

Separate causes from consequences.



CALIBRATE RATINGS

Discuss inconsistent scoring across owners.



TARGET RESPONSES

Reduce likelihood, impact or both.



CHECK EFFECTIVENESS

Require evidence before lowering residual ratings.



MONITOR TRIGGERS

Reassess active threats regularly.



USEFUL OUTPUTS

Prioritized risk register, response actions, residual exposure review and escalation decisions. Quantify financial exposure separately when justified.



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30 Essential Project Management KPIs



RISK RESPONSE COMPLETION RATE

Check whether due risk-response actions are completed with verified evidence.



1 WHAT IT MEASURES

The share of response actions due by the cutoff that are verified complete at that cutoff.



ACTION

A specific task intended to address a risk.



DUE COHORT

All actions with agreed due dates on or before the cutoff.



COMPLETE

Defined action evidence has been accepted.



OVERDUE

Due but not complete actions remain in the denominator.



DISTINCTION

Completion of an action does not prove that risk exposure has fallen.

2 FORMULA & METHOD

$$\text{Rate} = \frac{\text{Verified complete due actions}}{\text{All actions due}} \times 100$$



1 Set the reporting cutoff.



2 Identify the complete due-action population.



3 Check evidence against each action's completion criteria.



4 Count verified completions.



5 Report overdue critical actions separately.



CONTROL

If no actions are due, report N/A.



Track on-time completion separately; this measure can include actions completed late before the cutoff.

3 DATA & EVIDENCE



RISK REGISTER

Linked risk, owner and priority.



ACTION LOG

Named owner, due date and success criteria.



COMPLETION EVIDENCE

Test result, contract, backup plan or approved deliverable.



DATE HISTORY

Original and revised commitments.



RESIDUAL REVIEW

Current risk assessment after implementation.



QUALITY CHECK

Avoid closing actions based solely on an owner's statement when objective evidence is required.

4 WORKED EXAMPLE

Illustrative cutoff:

Risk-response actions due: 20

Verified complete: 15

Still incomplete: 5

$$\text{Rate} = 15 / 20 \times 100 = 75\%$$



Of the 15 completed actions, three finished late.



READING

Seventy-five percent of due actions are now complete. On-time performance is lower.



One unfinished action protects a critical supplier dependency and needs immediate escalation.

5 WHY IT MATTERS



EXECUTION DISCIPLINE

Turns risk discussion into visible follow-through.



ACCOUNTABILITY

Shows where ownership or support is missing.



EARLY WARNING

Exposes unimplemented safeguards.



GOVERNANCE

Gives sponsors a concrete response-status view.



PRIORITY CONTROL

Identifies consequential overdue work.



AVOID THE TRAP

Completing many easy actions can conceal one overdue response that matters most.

6 IMPROVE & OUTPUTS



MAKE ACTIONS SPECIFIC

State the deliverable and evidence required.



SET REALISTIC DATES

Align deadlines with risk triggers.



CLEAR DEPENDENCIES

Remove missing approvals or resources.



ESCALATE CRITICAL GAPS

Prioritize exposure over simple action count.



TEST EFFECTIVENESS

Reassess the risk after completion.



USEFUL OUTPUTS

Response dashboard, overdue action list, evidence links and residual risk decisions.



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30 Essential Project Management KPIs





ISSUE RESOLUTION TIME

Measure how long closed issues take to move from logging to verified resolution.



1 WHAT IT MEASURES

Resolution time measures elapsed time from an issue's logged start to its verified closure.



ISSUE

A problem that already exists and needs action.



START

The agreed logged timestamp.



FINISH

Closure confirmed against resolution criteria.



CLOSED COHORT

Issues resolved during the reporting period.



CLOCK

State whether calendar or business time is used.



BOUNDARY

Closed-issue speed does not show how old unresolved issues have become.

2 FORMULA & METHOD

Issue time = Verified closure time - Logged time

Mean = $\frac{\text{Sum of resolution times}}{\text{Number of closed issues}}$

- 1 Define clock and closure rules.
- 2 Select issues closed in the period.
- 3 Calculate each issue's duration.
- 4 Report mean, median and severe outliers.
- 5 Segment by priority or issue type.



CONTROL

If none close, report N/A.
State how reopened issues and paused time are treated.

3 DATA & EVIDENCE



ISSUE REGISTER

Unique ID, severity, owner and logged date.



CLOSURE EVIDENCE

Confirmed fix, acceptance or validated workaround.



TIMESTAMP HISTORY

Assignments, escalation and closure events.



SERVICE RULES

Priority-specific targets and clock definitions.



REOPEN RECORDS

Failed fixes and repeat incidents.



QUALITY CHECK

Do not close unresolved items merely to stop the clock; verify the agreed outcome.

4 WORKED EXAMPLE

Illustrative closed-issue times:

2, 3, 4, 5 and 16 days

Total = 30 days across five issues

Mean = $30 / 5 = 6$ days

Median = 4 days



READING

A 16-day outlier raises the mean.
Both figures are useful.



Also inspect open issues; fast closure of easy cases can coexist with a serious problem that remains unresolved for weeks.

5 WHY IT MATTERS



FLOW VISIBILITY

Reveals how quickly problems receive effective treatment.



ESCALATION FEEDBACK

Exposes delays in decisions and ownership.



CAPACITY PLANNING

Identifies overloaded support or delivery teams.



SERVICE EXPECTATIONS

Tests priority-based response commitments.



PROCESS LEARNING

Separates diagnosis, waiting and correction delays.



AVOID THE TRAP

Comparing different severity mixes can create unfair or misleading team rankings.

6 IMPROVE & OUTPUTS



TRIAGE QUICKLY

Assign severity, owner and next action.



REMOVE WAITING

Escalate blocked decisions and missing access.



STANDARDIZE FIXES

Reuse proven responses to recurring problems.



VERIFY CLOSURE

Confirm the issue is resolved for affected users.



REVIEW OUTLIERS

Learn from long cases without hiding them.



USEFUL OUTPUTS

Resolution-time profile, escalation actions, recurring-cause log and backlog review.





ISSUE BACKLOG AGING



Expose how long unresolved problems have remained open at the reporting cutoff.

1 WHAT IT MEASURES

Backlog aging measures the age of issues still open, making long-waiting problems visible.



OPEN ISSUE

Not yet verified closed at the cutoff.



AGE

Time from the original logged date to the cutoff.



AGING BUCKET

A defined time band such as 0-7, 8-14, 15-30 or over 30 days.



PRIORITY

Severity must accompany age.



DISTINCTION

This is a snapshot of unresolved work, not the resolution speed of closed issues.

2 FORMULA & METHOD

$\text{Age} = \text{Cutoff date} - \text{Logged date}$

$\text{Aged share} = \frac{\text{Open issues above chosen age threshold}}{\text{All open issues}} \times 100$

1



Freeze the cutoff and calendar convention.

2



Include every unresolved issue.

3



Calculate age and assign time buckets.

4



Segment by priority and owner.

5



Highlight oldest and blocked items.



CONTROL

With no open issues, report zero backlog and N/A for the percentage.

3 DATA & EVIDENCE



ISSUE REGISTER

Original logged date, owner and current status.



PRIORITY RULES

Severity, urgency and business impact.



ACTION HISTORY

Last update, next step and escalation.



BLOCKER RECORDS

Dependencies preventing progress.



CLOSURE RULES

Evidence required before removal from backlog.



QUALITY CHECK

Reassignment or a status change should not silently reset the original age clock.

4 WORKED EXAMPLE

Illustrative backlog of 20 issues:

AGING BUCKET	NUMBER OF ISSUES
0-7 days	8
8-14 days	5
15-30 days	4
Over 30 days	3

Share over 14 days = $7 / 20 \times 100 = 35\%$



READING

More than one third of open issues have waited over two weeks.



These bands are illustrative. One new critical issue may deserve attention before an older low-impact item.

5 WHY IT MATTERS



HIDDEN DELAY

Reveals unresolved work behind attractive closure statistics.



PRIORITY CONTROL

Combines waiting time with business impact.



ESCALATION

Highlights stale ownership and blocked decisions.



CAPACITY SIGNAL

Shows whether work is accumulating faster than it clears.



TRUST

Encourages transparent reporting of difficult problems.



AVOID THE TRAP

Closing and reopening the same unresolved issue can artificially improve the aging profile.

6 IMPROVE & OUTPUTS



REVIEW OLDEST ITEMS

Confirm relevance, ownership and next steps.



ESCALATE BLOCKERS

Give decisions a clear deadline.



CONTROL NEW WORK

Reserve capacity for critical existing issues.



RESOLVE DUPLICATES

Link related records without erasing history.



VERIFY DISPOSITION

Close only with documented resolution or authorized acceptance.



USEFUL OUTPUTS

Aging profile, priority backlog, blocker list and owner commitments.



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30 Essential Project Management KPIs



RESOURCE UTILIZATION RATE



Compare recorded project work with the capacity genuinely available for it.



1 WHAT IT MEASURES

Utilization measures the share of defined available capacity used for recorded project work.



PROJECT HOURS

Actual hours spent on the included project activities.



AVAILABLE HOURS

Scheduled capacity after agreed exclusions such as leave.



NET CAPACITY

Document how training, support and other commitments are treated.



TIME WINDOW

Use matching periods for demand and capacity.



BOUNDARY

High utilization does not prove productivity, quality or sustainable performance.

2 FORMULA & METHOD

$$\text{Utilization} = \frac{\text{Actual project hours}}{\text{Available capacity hours}} \times 100$$

- 1 Define included work and capacity exclusions.
- 2 Calculate available hours by person and skill.
- 3 Validate actual project time.
- 4 Divide matching totals.
- 5 Review utilization with queue, quality and overtime indicators.



CONTROL

Zero available capacity gives N/A.



Values over 100% require explanation, such as overtime, inconsistent capacity assumptions or miscoded time.

3 DATA & EVIDENCE



RESOURCE CALENDAR

Working patterns, holidays and leave.



TIME RECORDS

Actual hours by activity and project.



ALLOCATION PLAN

Other projects and operational commitments.



SKILL MATRIX

Capacity qualified for the relevant work.



OVERTIME RECORDS

Additional hours and sustainability concerns.



QUALITY CHECK

Do not count the same person's capacity in full across several simultaneous projects.

4 WORKED EXAMPLE

Illustrative team week:

Nominal capacity:	200 hours
Planned leave:	20 hours
Available capacity:	180 hours
Recorded project work:	144 hours

$$\text{Utilization} = 144 / 180 \times 100 = 80\%$$



READING

Four fifths of the defined capacity supported project work.



The remaining time may include agreed buffer, coordination or other obligations; investigate the basis before calling it waste.

5 WHY IT MATTERS



CAPACITY VISIBILITY

Shows whether assigned work fits available time.



BALANCING

Reveals uneven loading between roles.



FORECASTING

Informs realistic staffing and delivery plans.



SUSTAINABILITY

Helps identify persistent overtime and overload.



COST CONTEXT

Connects staffing assumptions with actual use.



AVOID THE TRAP

Planning every person at 100% can create queues and leave no room for uncertainty or urgent work.

6 IMPROVE & OUTPUTS



CHECK DEFINITIONS

Align capacity and time-recording rules.



BALANCE LOAD

Redistribute work where skills permit.



PROTECT FOCUS

Reduce avoidable switching and fragmented assignments.



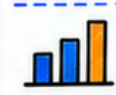
ALLOW BUFFER

Account for uncertainty and coordination.



WATCH OUTCOMES

Review quality, throughput and fatigue together.



USEFUL OUTPUTS

Role-level load view, staffing adjustments and capacity forecast. Targets depend on work type and context.



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30 Essential Project Management KPIs





RESOURCE AVAILABILITY GAP

Identify where required skill-hours exceed the capacity available in the same period.



1 WHAT IT MEASURES

The gap compares required effort with genuinely available capacity by skill and time period.



DEMAND

Hours needed to deliver planned work.



SUPPLY

Qualified capacity available after other commitments and exclusions.



POSITIVE GAP

A shortage requiring action.



NEGATIVE GAP

Capacity exceeds current demand.



ZERO GAP

Demand and supply balance numerically.



BOUNDARY

Spare hours in one skill do not automatically cover a shortage in another.

2 FORMULA & METHOD

$$\text{Gap} = \text{Required hours} - \text{Available hours}$$

$$\text{Shortage \%} = \text{Positive gap} / \text{Required hours} \times 100$$

1



Forecast demand by role and week.

2



Verify qualified availability.

3



Subtract matching capacity from demand.

4



Locate timing and skill bottlenecks.

5



Test a feasible response.



CONTROL

If demand is zero, show N/A for shortage %. Do not offset a critical-role shortage with unrelated surplus capacity.

3 DATA & EVIDENCE



WORK PLAN

Remaining tasks, estimates and planned dates.



RESOURCE CALENDARS

Leave, shifts and working hours.



ALLOCATION RECORDS

Commitments to other projects and operations.



SKILL MATRIX

Qualifications, experience and substitution limits.



SUPPLIER PLAN

Contracted support and onboarding lead time.



QUALITY CHECK

Confirm availability with resource owners instead of assuming assigned people are free.

4 WORKED EXAMPLE

Illustrative test phase:

Required testing effort: 240 hours

Available qualified testing capacity: 180 hours

$$\text{Gap} = 240 - 180 = 60 \text{ hours}$$

$$\text{Shortage \%} = 60 / 240 \times 100 = 25\%$$



READING

One quarter of required testing capacity is missing.



An extra 60 design hours elsewhere does not remove the testing gap unless those people can perform the required work effectively.

5 WHY IT MATTERS



FEASIBLE PLANS

Tests whether the schedule has enough qualified capacity.



EARLY HIRING

Reveals needs before recruitment or procurement lead times expire.



BOTTLENECK CONTROL

Identifies constrained skills.



TRADEOFF CLARITY

Connects scope, timing and staffing decisions.



DELIVERY CONFIDENCE

Reduces reliance on hidden overtime assumptions.



AVOID THE TRAP

Additional people may initially reduce capacity because onboarding consumes experienced staff time.

6 IMPROVE & OUTPUTS



RESEQUENCE

Move flexible work away from constrained periods.



REDUCE DEMAND

Review scope and unnecessary work.



ADD CAPACITY

Secure qualified support with realistic lead time.



BUILD SKILLS

Train or pair staff where feasible.



REFORECAST

Confirm the new plan remains sustainable.



USEFUL OUTPUTS

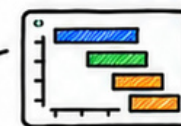
Skill-gap profile, staffing request, revised resource plan and dependency decisions.



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30 Essential Project Management KPIs





STAKEHOLDER SATISFACTION SCORE



Summarize stakeholder feedback with a consistent survey and visible response coverage.

1 WHAT IT MEASURES

A satisfaction score summarizes how respondents rate their experience with the project.



SCALE

Use consistent labels, such as 1 very dissatisfied to 5 very satisfied.



QUESTION

Keep wording and recall period stable.



RESPONDENTS

Identify the stakeholder groups represented.



COVERAGE

Report response count and invitation count.



BOUNDARY

Satisfaction is a perception measure; it does not replace objective delivery, quality or benefits evidence.

2 FORMULA & METHOD

Mean score = $\frac{\text{Sum of valid ratings}}{\text{Valid responses}}$

Response rate = $\frac{\text{Valid responses}}{\text{Eligible invitations} \times 100}$

1



Define the question and rating labels.

2



Invite a representative eligible group.

3



Exclude invalid or duplicate responses consistently.

4



Calculate the mean and rating distribution.

5



Review comments and differences between groups.



CONTROL

No valid responses means N/A, not zero satisfaction.

3 DATA & EVIDENCE



SURVEY FORM

Stable wording, scale and reporting period.



STAKEHOLDER REGISTER

Eligible groups and invitation basis.



RESPONSE RECORDS

Valid ratings and optional comments.



DELIVERY CONTEXT

Recent releases, incidents and expectations.



ACTION HISTORY

Previous concerns and follow-up commitments.



QUALITY CHECK

Small or biased samples limit interpretation. Protect respondent confidentiality when reporting tiny groups.

4 WORKED EXAMPLE

Illustrative survey:

Eligible invitations: 50

Valid responses: 40

Sum of 1-to-5 ratings: 168

Mean score = $168 / 40 = 4.2$ out of 5

Response rate = $40 / 50 \times 100 = 80\%$



READING

Respondents are broadly positive, with strong coverage.



Check whether one important stakeholder group scores much lower; the overall average may hide a significant concern.

5 WHY IT MATTERS



EXPECTATION CHECK

Reveals gaps between delivery and stakeholder experience.



EARLY FEEDBACK

Surfaces concerns before formal escalation.



RELATIONSHIP HEALTH

Tracks whether communication and trust improve.



SERVICE LEARNING

Connects comments with actionable changes.



TREND VISIBILITY

Supports comparison when survey methods stay stable.



AVOID THE TRAP

Surveying only supportive stakeholders creates a misleadingly favorable score.

6 IMPROVE & OUTPUTS



INVITE BALANCED FEEDBACK

Include affected and less-engaged groups.



ANALYZE COMMENTS

Identify recurring themes behind ratings.



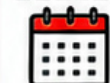
CLARIFY EXPECTATIONS

Agree realistic commitments and acceptance criteria.



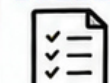
CLOSE THE LOOP

Tell stakeholders what changed because of feedback.



RECHECK

Use the same questions in the next comparable period.



USEFUL OUTPUTS

Satisfaction profile, response coverage, concern themes and action owners.



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STAKEHOLDER ENGAGEMENT RATE

Measure meaningful participation among the stakeholders targeted for involvement.



1 WHAT IT MEASURES

Engagement rate tracks the share of targeted stakeholders who perform a defined meaningful action in a period.



TARGET GROUP

People whose involvement is needed for the selected activity.



MEANINGFUL ACTION

Input, decision, review, workshop contribution or committed task.



UNIQUE PEOPLE

Count each participant once per cohort.



PASSIVE REACH

An email open or invitation alone is not meaningful engagement.



BOUNDARY

Participation does not necessarily mean agreement or support.

2 FORMULA & METHOD

Rate = $\frac{\text{Unique meaningfully engaged stakeholders}}{\text{Targeted eligible stakeholders}} \times 100$

- 1 Define the target group and period.
- 2 State qualifying actions in advance.
- 3 Collect participation evidence.
- 4 De-duplicate people across channels.
- 5 Calculate overall and priority-group rates.



CONTROL

No eligible targets means N/A.



Track engagement quality separately instead of inflating the count with low-value activity.

3 DATA & EVIDENCE



ENGAGEMENT PLAN

Target groups and required involvement.



STAKEHOLDER REGISTER

Current roles, influence and relevance.



WORKSHOP RECORDS

Contributions and agreed actions.



REVIEW LOGS

Substantive feedback and approval decisions.



ACTION TRACKER

Ownership and completed commitments.



QUALITY CHECK

Maintain a consistent qualifying-action rule. Attendance alone may be insufficient when the objective requires input or a decision.

4 WORKED EXAMPLE

Illustrative design review period:

Targeted eligible stakeholders: 30

Unique stakeholders giving meaningful input: 21

$$\text{Rate} = 21 / 30 \times 100 = 70\%$$



READING

Seven in ten intended participants contributed.



If only one of three critical decision-makers engaged, address that gap even though the overall rate appears reasonable.



Do not count the same person again for sending multiple comments.

5 WHY IT MATTERS



INPUT QUALITY

Increases the chance of finding missing needs early.



DECISION READINESS

Reveals whether essential voices are involved.



ADOPTION SUPPORT

Encourages participation in change.



RELATIONSHIP VISIBILITY

Identifies disengaged or excluded groups.



ACTION OWNERSHIP

Connects consultation with follow-through.



AVOID THE TRAP

High participation in low-stakes meetings may hide absent stakeholders at crucial decisions.

6 IMPROVE & OUTPUTS



MAKE THE ASK CLEAR

Specify the input or decision needed.



USE THE RIGHT CHANNEL

Match format and timing to stakeholder needs.



REMOVE FRICTION

Share concise context and accessible materials.



FOLLOW UP GAPS

Contact essential missing participants appropriately.



SHOW THE IMPACT

Explain how their input affected the work.



USEFUL OUTPUTS

Engagement coverage, priority-group gaps, action log and revised engagement plan.



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30 Essential Project Management KPIs



COMMUNICATION RESPONSE RATE



Track useful replies to project messages that explicitly require a response.



1 WHAT IT MEASURES

Response rate measures the share of eligible requests that receive a usable reply by a defined cutoff.



ELIGIBLE REQUEST

A message asking an identified person for specific input or action.



USABLE RESPONSE

Answers the request sufficiently to support the next step.



BROADCAST

Informational messages requiring no reply are excluded.



REQUEST ID

Count distinct requests, not reminders or reply messages.



BOUNDARY

A quick acknowledgement is not always a complete response.

2 FORMULA & METHOD

$$\text{Rate} = \frac{\text{Requests with usable responses}}{\text{Eligible requests sent}} \times 100$$

- 1 Define the request cohort and response cutoff.
- 2 State what counts as usable.
- 3 De-duplicate reminders and follow-ups.
- 4 Link replies to original request IDs.
- 5 Review missing and incomplete responses.



CONTROL

No eligible requests means N/A.



Track on-time response separately using replies received by their individual due dates.

3 DATA & EVIDENCE



REQUEST LOG

ID, recipient, question, sent date and deadline.



REPLY RECORD

Timestamp and substantive answer.



COMMUNICATION PLAN

Channels, response expectations and escalation.



ACTION TRACKER

Required follow-through after a reply.



STAKEHOLDER REGISTER

Correct owner and delegated authority.



QUALITY CHECK

Exclude automated acknowledgements and irrelevant replies unless they meet the agreed response definition.

4 WORKED EXAMPLE

Illustrative review cohort:

Eligible requests sent: 50

Requests with usable replies by cutoff: 40

$$\text{Rate} = 40 / 50 \times 100 = 80\%$$

Thirty-five were answered by their own deadlines.

$$\text{On-time response rate} = 35 / 50 \times 100 = 70\%$$



READING

Overall response coverage is good, but timeliness is weaker.



Ten unresolved requests still need follow-up.

5 WHY IT MATTERS



COORDINATION

Shows whether required information reaches the project.



DELAY PREVENTION

Highlights unanswered requests blocking work.



CHANNEL QUALITY

Tests whether communication methods work.



ACCOUNTABILITY

Connects asks with named recipients and deadlines.



DECISION READINESS

Reveals missing input before review meetings.



AVOID THE TRAP

Sending unnecessary requests can create a large denominator and distract people from consequential decisions.

6 IMPROVE & OUTPUTS



MAKE ONE CLEAR ASK

Specify the response needed and why.



NAME THE OWNER

Send the request to someone able to act.



SET A DATE

Match urgency to the real dependency.



PROVIDE CONTEXT

Include the information needed for a useful reply.



FOLLOW UP SMARTLY

Escalate blocked critical requests.



USEFUL OUTPUTS

Response dashboard, unanswered-request list, overdue decisions and communication improvements.



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DECISION TURNAROUND TIME



Measure elapsed time from a complete decision request to an authorized decision.



① WHAT IT MEASURES

Decision turnaround time measures how long a decision-ready request waits before formal disposition.



START

Complete request accepted for decision.



FINISH

Authorized decision recorded and communicated.



DECISION-READY

Required options, evidence and impacts are available.



DISPOSITION

Approval, rejection or a documented alternative.



CLOCK

State business-day or calendar-day rules.



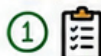
BOUNDARY

Fast decisions are not automatically sound; review quality and reversals too.

② FORMULA & METHOD

Time = Decision timestamp -
Decision-ready timestamp

Mean = Total elapsed decision time /
Decisions completed



① Define readiness and authority rules.



② Select completed decisions in the period.



③ Calculate duration per request.



④ Report median and long outliers alongside the mean.



⑤ Review pending decision age separately.



CONTROL

If no decisions complete, report N/A. Also track time spent making requests decision-ready.

③ DATA & EVIDENCE



DECISION LOG

Request ID, owner, authority and required date.



READINESS RECORD

When required evidence became complete.



DECISION PACK

Options, impacts, recommendation and uncertainties.



APPROVAL HISTORY

Formal disposition and timestamp.



DEPENDENCY RECORD

Work blocked while a decision waits.



QUALITY CHECK

Do not reset the clock by repeatedly resubmitting the same unresolved decision.

④ WORKED EXAMPLE

Illustrative completed decisions:

Elapsed times: 2, 3, 4, 6 and 10 business days

Total = 25 days

Mean = $25 / 5 = 5$ days

Median = 4 days



READING

The typical completed decision took four days, with a ten-day outlier.



A pending decision now aged 15 days must be shown separately; it is absent from the completed-decision calculation.

⑤ WHY IT MATTERS



FLOW CONTROL

Makes governance delay visible.



DEPENDENCY PROTECTION

Highlights decisions holding up critical work.



DELEGATION

Shows where authority is unnecessarily centralized.



PLANNING

Improves lead-time assumptions for approvals.



MEETING DESIGN

Identifies overloaded committees or weak preparation.



AVOID THE TRAP

Measuring only completed decisions rewards closing easy requests while difficult decisions remain unattended.

⑥ IMPROVE & OUTPUTS



PREPARE WELL

Provide concise options, impacts and a recommendation.



CLARIFY AUTHORITY

Identify who can decide and who advises.



SET DEADLINES

Link the required date to delivery consequences.



ESCALATE EXCEPTIONS

Give overdue consequential decisions visibility.



REVIEW QUALITY

Track rework or reversals after decisions.



USEFUL OUTPUTS

Decision-age report, turnaround trend, delegated-authority map and escalation actions.



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CHANGE REQUEST CYCLE TIME



Track the time needed to reach a formal disposition on submitted change requests.



1 WHAT IT MEASURES

Cycle time measures elapsed time from formal change submission to an authorized final decision.



SUBMISSION

Request is logged through the agreed change process.



DISPOSITION

Approved, rejected or otherwise formally resolved.



ASSESSMENT

Includes impact analysis, consultation and decision waiting.



IMPLEMENTATION

Delivery of an approved change is measured separately.



BOUNDARY

A fast decision is useful only when impacts and authority are adequately considered.

2 FORMULA & METHOD

Cycle time = Final disposition date - Submission date

Mean = Sum of cycle times / Requests disposed

1



Define submission and disposition events.

2



Choose calendar or business-day counting.

3



Select requests decided during the period.

4



Calculate individual durations and the median.

5



Report still-pending request age separately.



CONTROL: No dispositions means N/A.
If paused time is excluded, also report gross elapsed time and the pause rule.

3 DATA & EVIDENCE



CHANGE REGISTER

ID, submitter, reason and logged date.



IMPACT ANALYSIS

Scope, schedule, cost, quality and benefit effects.



REVIEW HISTORY

Clarifications, assessments and escalation.



DECISION RECORD

Authority, disposition and effective date.



IMPLEMENTATION LINK

Work created after approval.



QUALITY CHECK

Keep emergency changes and standard changes distinguishable because their processing routes and urgency may differ.

4 WORKED EXAMPLE

Illustrative completed requests:

Cycle times: 4, 6, 8 and 14 days

Total = 32 days

Mean = $32 / 4 = 8$ days

Median = 7 days



READING

One lengthy assessment increases the average.



For a single request, an eight-day decision cycle followed by twenty implementation days still reports eight days here.

Implementation duration belongs in a separate measure.

5 WHY IT MATTERS



GOVERNANCE FLOW

Shows whether the change process supports delivery.



PLANNING RELIABILITY

Provides realistic approval lead times.



BOTTLENECK DISCOVERY

Separates assessment delay from decision waiting.



STAKEHOLDER CLARITY

Reduces uncertainty around proposed work.



RESOURCE CONTROL

Helps avoid starting unauthorized changes.



AVOID THE TRAP

Shortening analysis indiscriminately can create expensive downstream surprises.

6 IMPROVE & OUTPUTS



IMPROVE INTAKE

Require clear reasons, scope and supporting evidence.



TRIAGE

Route simple and consequential changes appropriately.



ASSIGN ASSESSORS

Give impact analysis clear owners and dates.



SCHEDULE DECISIONS

Ensure authorized reviewers are available.



TRACK PENDING WORK

Escalate stalled requests and missing information.



USEFUL OUTPUTS

Cycle-time profile, pending-change aging, bottleneck actions and implementation handoffs.



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30 Essential Project Management KPIs



CUSTOMER ACCEPTANCE RATE



Track formal acceptance across a defined cohort of deliverables submitted to the customer.

1 WHAT IT MEASURES

Acceptance rate shows the share of a fixed submitted-deliverable cohort formally accepted by the cutoff.



DELIVERABLE

A distinct output with agreed acceptance criteria.



SUBMITTED COHORT

Items formally submitted in the chosen period.



ACCEPTED

Customer approval is recorded.



PENDING OR REJECTED

Remain in the denominator until the stated cutoff.



DISTINCTION

Acceptance after correction counts here; first-pass acceptance is a separate measure.

2 FORMULA & METHOD

$$\text{Rate} = \frac{\text{Distinct accepted deliverables}}{\text{Distinct submitted deliverables}} \times 100$$

1



Define the cohort and observation cutoff.

2



Confirm submission records.

3



Match formal decisions to deliverable IDs.

4



Count accepted items once, regardless of resubmissions.

5



Show pending and rejected counts separately.



CONTROL

No submissions means N/A.



Specify whether conditional acceptance counts, and report remaining conditions transparently.

3 DATA & EVIDENCE



CONTRACT OR AGREEMENT

Acceptance authority and conditions.



DELIVERABLE REGISTER

Stable IDs and submission dates.



ACCEPTANCE CRITERIA

Agreed evidence and performance requirements.



DECISION RECORDS

Signed approval or authorized electronic acceptance.



REJECTION LOG

Reasons and required corrections.



QUALITY CHECK

Delivery or receipt alone is not formal acceptance when the agreement requires an explicit decision.

4 WORKED EXAMPLE

Illustrative submitted cohort:

	Distinct deliverables submitted:	20
	Formally accepted by cutoff:	16
	Pending decision:	3
	Rejected and awaiting correction:	1

$$\text{Rate} = 16 / 20 \times 100 = 80\%$$

READING:



Four fifths of the cohort is accepted.



The three pending items may be technically complete but cannot be counted as accepted without the required customer decision.

5 WHY IT MATTERS



DELIVERY CONFIRMATION

Shows whether outputs meet agreed expectations.



HANDOVER READINESS

Identifies items still requiring approval.



COMMERCIAL VISIBILITY

Supports contract-specific milestone discussions.



QUALITY FEEDBACK

Reveals recurring acceptance obstacles.



CLOSEOUT CONTROL

Prevents assuming that submission equals completion.



AVOID THE TRAP

Acceptance does not automatically prove that intended business benefits have been realized.

6 IMPROVE & OUTPUTS



AGREE CRITERIA EARLY

Remove ambiguity before production.



CONFIRM REVIEWERS

Ensure the customer has authority and capacity.



SUBMIT COMPLETE EVIDENCE

Make verification easy.



TRACK CONDITIONS

Assign owners to corrections and outstanding approvals.



FOLLOW UP PENDING ITEMS

Separate review delays from quality failures.



USEFUL OUTPUTS

Acceptance register, pending approvals, correction plan and handover readiness report.



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30 Essential Project Management KPIs





BENEFITS REALIZATION RATE



Compare verified delivered benefits with the target for the same measurement period.

1 WHAT IT MEASURES

Benefits realization measures how much of a defined expected business benefit has actually been achieved.



BENEFIT

A measurable improvement linked to business objectives.



BASELINE

Performance before the intervention or a justified comparison.



TARGET

Benefit expected by the specific measurement date.



ACTUAL

Verified incremental improvement attributable to the change.



BOUNDARY

Completing deliverables does not prove benefits. Some benefits appear after project closure.

2 FORMULA & METHOD

$$\text{Rate} = \frac{\text{Verified actual benefit}}{\text{Planned benefit for the same period}} \times 100$$

- ① Name the benefit, unit and accountable owner.
- ② Record the baseline and measurement method.
- ③ Match actual and planned periods.
- ④ Adjust for agreed attribution and cost treatment.
- ⑤ Validate the result with the business owner.



CONTROL

A zero target gives N/A. Do not combine incompatible units without a justified weighting method.

3 DATA & EVIDENCE



BENEFITS REGISTER

Definition, target, owner and timing.



BASELINE DATA

Prior cost, time, revenue or service performance.



OPERATING RESULTS

Verified post-change measurements.



ADOPTION EVIDENCE

Whether intended users use the new capability.



ATTRIBUTION RULES

Treatment of unrelated changes and double counting.



QUALITY CHECK

Separate gross savings from net benefit when implementation or operating costs must be deducted.

4 WORKED EXAMPLE

Illustrative annual savings benefit:

Target savings for the measured year:
\$100,000

Verified attributable savings:
\$80,000

$$\text{Rate} = \$80,000 / \$100,000 \times 100 = 80\%$$



READING

Four fifths of the period's savings target has been achieved.



A project delivered on time may still miss this benefit if adoption is weak. Compare matching periods; do not compare one month of savings with a full-year target.

5 WHY IT MATTERS



BUSINESS VALUE

Connects project delivery with intended outcomes.



ACCOUNTABILITY

Gives benefits clear operational ownership.



ADOPTION FOCUS

Reveals where capabilities are underused.



INVESTMENT LEARNING

Improves future business-case assumptions.



SUSTAINABILITY

Checks whether gains persist after handover.



AVOID THE TRAP

Crediting all improvement to the project can exaggerate results when market or operational factors also changed.

6 IMPROVE & OUTPUTS



ASSIGN OWNERS

Keep benefit accountability beyond project closure.



ENABLE ADOPTION

Support users, processes and operating changes.



VERIFY DATA

Test baseline quality and measurement consistency.



ADDRESS GAPS

Identify why expected outcomes have not appeared.



REVIEW LATER

Schedule follow-up at the agreed realization dates.



USEFUL OUTPUTS

Benefits scorecard, attribution notes, adoption actions and post-implementation review.



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HOW TO USE THIS GUIDE



Define the measure. Check the evidence. Choose the action.

1 CHOOSE USEFUL METRICS

Start with the decisions your project needs to make.



SELECT:

Choose a small balanced set across delivery, cost, quality, risk and outcomes.



DEFINE:

Record the formula, unit, population, owner and reporting frequency.



SET CONTEXT:

Agree tolerances suitable for this project and phase.



PAIR MEASURES:

Read averages with counts, trends, outliers and qualitative evidence.



ACT:

Every important exception should lead to an accountable next step.

2 MEASUREMENT RULES



MATCH PERIODS:

Align scope, baseline and cutoff before calculating.



ZERO DENOMINATORS:

Report N/A when a ratio cannot be calculated meaningfully.



KEEP HISTORY:

Record authorized changes without erasing original commitments.



LABEL EXAMPLES:

All worked numbers in this book are illustrative.



LOCAL DEFINITIONS:

Operational metrics may have alternative definitions; these cards state the convention used.



NO UNIVERSAL TARGETS:

Adapt thresholds to the work, risk and agreed commitments.

3 EARNED VALUE SOURCES



[1] U.S. Department of Energy

Project Management Lexicon of Terms. Definitions for EV, PV, AC, CPI, SPI, EAC and related concepts.



[2] U.S. Department of Defense

Earned Value Management Definitions. Reference for TCPI and baseline terminology.



[3] Project Management Institute

The Earned Schedule. Explains the limits of traditional earned-value schedule indicators.

These sources inform the EVM concepts on Cards 1, 2, 4, 5, 7, 8 and 9.

4 SCHEDULE & QUALITY SOURCES



[4] U.S. Government Accountability Office

GAO Schedule Assessment Guide, GAO-16-89G. Guidance on reliable schedules, baselines, critical paths and updating progress. Relevant to Cards 3, 10 and 12.



[5] American Society for Quality

Quality Glossary. Reference for first-pass yield and related quality concepts. Card 16 adapts the right-first-time idea to formal project deliverable acceptance.



Click a source panel in the PDF to open its reference.

5 RISK & BENEFIT SOURCES



[6] Project Management Institute

Risk Analysis and Management. Background on probability-impact prioritization. Card 18 explicitly treats rating scores as qualitative priority aids.



[7] Project Management Institute

Benefits Realization Management Framework. Identifying, delivering and sustaining benefits beyond project handover. Relevant to Card 30.

The examples, operational conventions and action checklists are original educational material prepared for this guide.

6 MAKE THE GUIDE WORK



ASSIGN AN OWNER:

Someone must validate each metric and act on exceptions.



VERIFY INPUTS:

Inspect evidence before celebrating a favorable result.



DISCUSS CAUSES:

A number describes a condition; it does not establish its cause.



WATCH BEHAVIOR:

Avoid targets that reward shortcuts, hidden work or premature closure.



REVIEW REGULARLY:

Remove metrics that no longer support useful decisions.



NAVIGATE:

Use the PDF bookmarks to jump directly to any of the 30 cards.



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