

RefineM

Data Analytics for Project Managers

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CEO - Lagozon Technologies, India
Data Engineering | Data Analytics



(A RefineM Partner Organization)



Topics to be Covered



Section	Presentation Flow	Slide No.
1	Background and Context Setting	3
2	Velocity and Variety of Data Generation	7
3	Business Intelligence Tools	14
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5	Sample Dashboards and Quick Demo	26

About Speakers



NK Shrivastava

PMP, RMP, ACP, CSP, SPC4, ICP-ACC

Helping organizations turn their project management capability into a *competitive advantage*



CEO/Enterprise Agile Coach since Dec 2011

- Agile Transformation/Coaching (IBM, Charter, Wells Fargo ...)
- Project Management/Process Improvement Consulting
- Project Management and Agile Training
- PMP Exam Prep | PMI-ACP Exam Prep
- Agile
- Data Analytics/Power BI | Self-Paced Online Training
- Products for Project and Agile Professionals
- Essential Gear for Project Managers
- PMP Exam Simulator | Agility Assessment Tool
- Videos – PMP and Agile
- 25+ years of successful Agile & Project leadership
- Successfully led hundreds of projects of all sizes using Waterfall and/or Agile
- Recovered many projects, saved millions of dollars
- Implemented numerous process improvements
- Coached/mentored hundreds of PMs and executives
- Board member of SWMO PMI Chapter (2008-2014)

Born in Meerut, a small town in north India. Now lives in Cary, NC with wife and kids



Dr. Vipul Vashisht,

Ph.D., PMP, ACP, RMP, CSM, SAFe, Azure Data Scientist

Helping organizations solve complex Data Analytics and Data Engineering Problems

Chief Executive Officer – Lagozon Technologies

- CEO of Lagozon Technologies in India, one of the fast-growing Data Engineering organizations offering the best-in-class and niche IT consulting and solutions across diversified business verticals
- 25 years of IT industry experience in leadership positions with Polaris, Virtusa, Tech-Mahindra, McAfee, and Sopra-Steria.
- Responsible for scaling Data Engineering practice, Business Development, Managing Key Partnerships, and New Product Development
- Worked in the US, Singapore, Malaysia, and Dubai regions
- Speaker at International conferences, published research papers on AI and Business Analytics
- More than 20 highly prestigious Technology and Project Management certifications, including PMI-PMP, PMI-ACP, PMI-RMP, Microsoft Azure Data Scientist, Microsoft Data Analyst - PowerBI, QAI-CSQA, QAI-CSTE, CSM, SAFe, ITIL, Six Sigma.
- Engineer with BE in Electronics, MBA in Marketing (E-Commerce), MS in Software Systems and an Industry sponsored Doctorate in Software Engineering using Artificial Intelligence.

What is New at RefineM



Upcoming Free Webinar	Date
Churn in Agile	Feb 16

RefineM Products	Self-Paced Online Training
Essential Gear for Project Managers RefineM.com/products/	Agile Fundamentals Self-Paced Course RefineM.com/course/agile
PMP® Exam Prep Test Simulator Examprep.RefineM.com	PM Fundamentals Self-Paced Course Refinem.com/course/project-management-fundamentals/
Agility Assessment Agility.RefineM.com	Agile BusReqs Self-Paced Course https://vimeo.com/ondemand/refinembusreq
PDU Bundle https://vimeo.com/ondemand/refinempdus	Backlog Refinement Self-Paced Course Udemy.com/course/backlog-grooming-for-agile-requirements/



What are your Expectations for this Webinar?

Go to [menti.com](https://www.menti.com) to answer



How much Knowledge and/or Experience do you have with Data Analytics?

[Go to menti.com to answer](https://www.menti.com)



Today, all businesses are data businesses

Data is the lifeblood of modern work

**Data makes
business possible**

**Data is crucial to
businesses of all sizes**

**Securing data
is mandatory**



All data businesses need
to be analytic businesses

Without analytics data is a cost center,
not a resource



**Businesses need to
“know thyself”**

**Workers are empowered
with intelligent insights**

**Business intelligence
tools visualize patterns
we cannot**



Analytic businesses need data science to evolve

Every business has opportunities to make analytics faster, easier, and more insightful

Data science empowers us to go farther

Businesses need scalable analytics

AI/ML creates smarter organizations



The cloud is the default environment for new technology initiatives

Modern businesses succeed in the cloud

Applications are increasingly cloud-native

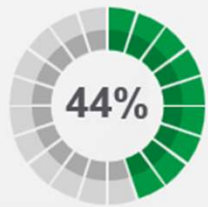
Collaboration platforms and file-sharing are transforming

Hybrid businesses are replacing on-premises data management

The Data Challenge



Despite significant investments in data and analytics, most organizations still only get limited results...



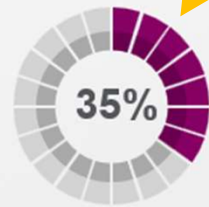
of organizations have enough data available for making decisions

IDC Data Culture Web Survey, 2021



of executives achieve transformational business outcomes

NewVantage Partners Big Data and AI Executive Survey, 2021



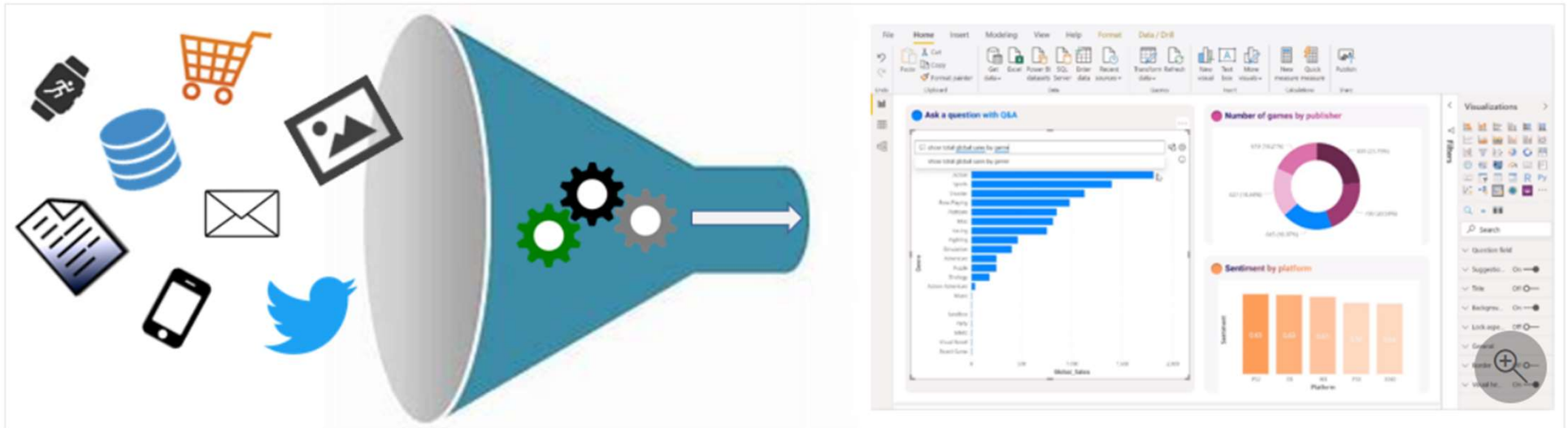
of executives see poor data literacy as important roadblock

Gartner Webinar, Drive Better Business Outcomes by Improving Your Organization's Data Literacy, Alan D. Duncan, May 12 2021

With data and information as the most strategic asset of a business, the underlying challenge faced today is understanding and using their data to positively affect change within the business.

Businesses continue to struggle to use data in a meaningful and productive way, which impacts their ability to act.

The Data Challenge



Think about all the data that is being generated each day and that is available in an organization, from transactional data in a traditional database, sales data, marketing data, HR data, PMO data, and many more

Data Analytics describes the process of uncovering trends, patterns, and correlations in large amounts of raw data to help make data-informed decisions.

Analytics for everyone, from anywhere

Business Intelligence (BI) Tools help people see and understand data.

The visual analytics platform is transforming the way people use data to solve problems.



Business Intelligence and Analytics Tools

- Some of the popular BI tools available in the market are Qlik Sense, QlikView, Microsoft PowerBI, Tableau, and ThoughtSpot.
- These tools have a direct impact on an organization's strategic, tactical and operational business decisions.
- BI Tools convert raw data into meaningful information and perform data analysis and create reports, summaries, dashboards, maps, graphs, and charts.



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Leaders in Data Analytics – BI Tools



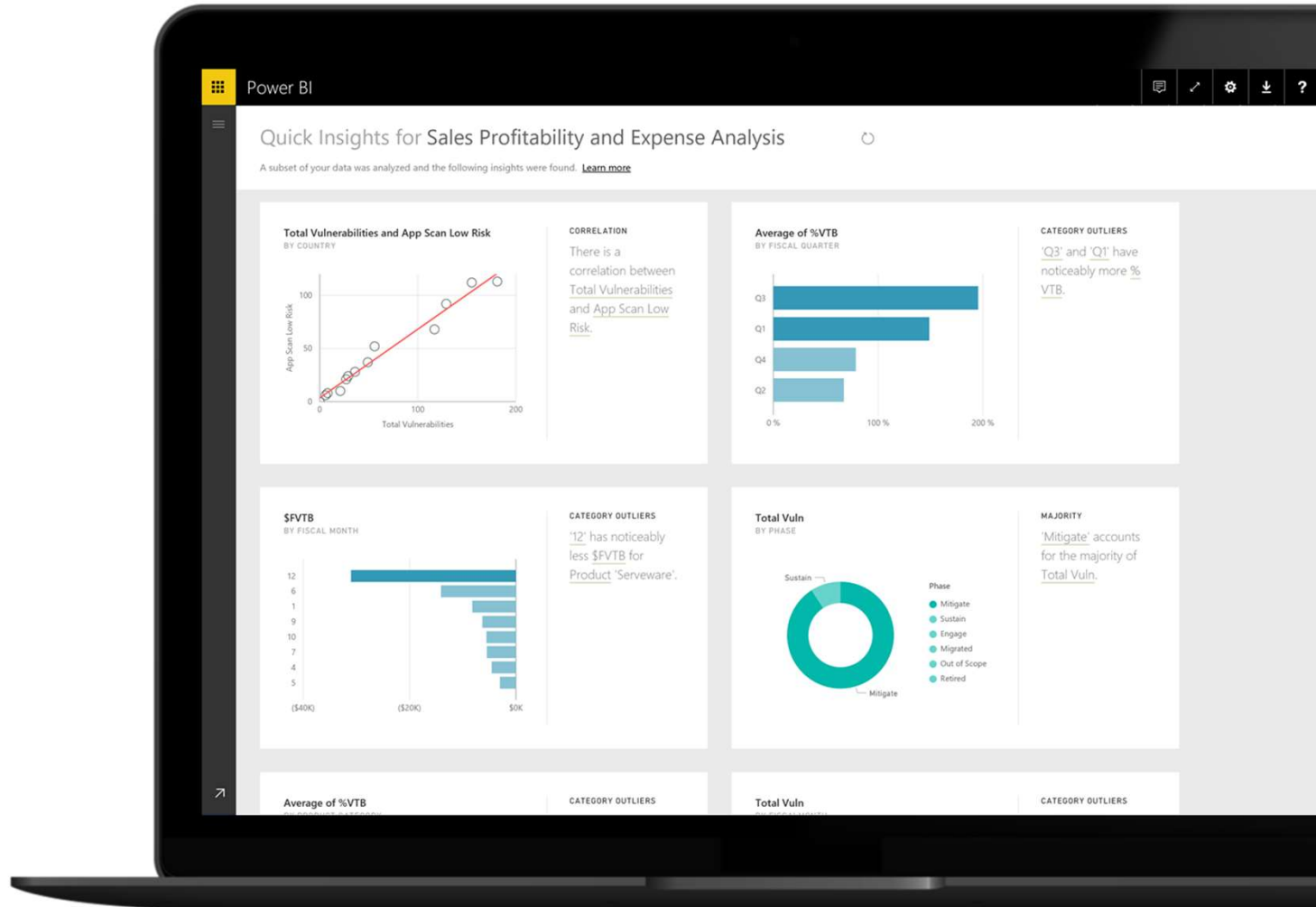
2022 Gartner® Magic Quadrant™ for Analytics and Business Intelligence Platforms

Gartner has recognized Microsoft as a Magic Quadrant Leader in analytics and business intelligence platforms. For the fourth year running, Microsoft is again positioned furthest in the completeness of vision and highest in the ability to execute.

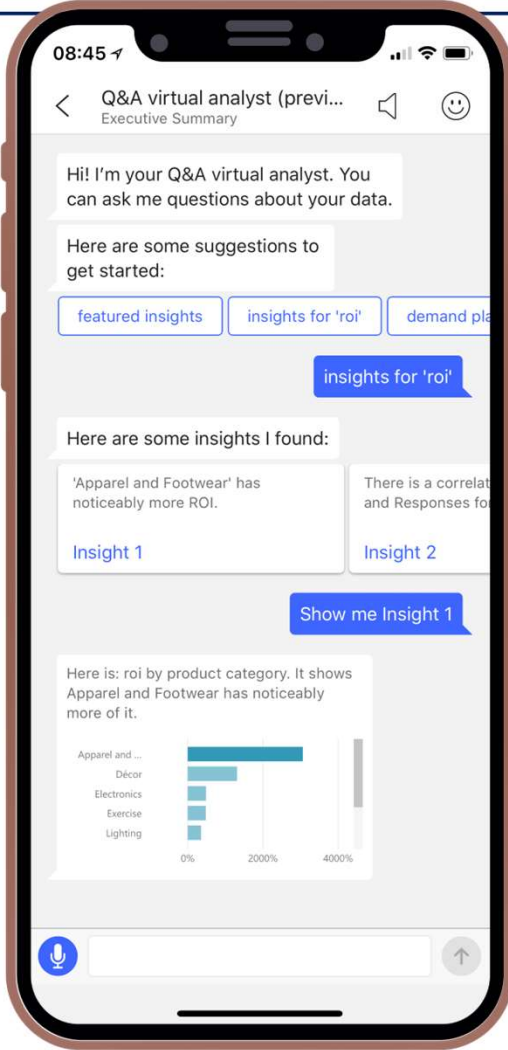
Ask questions
of your data



Automatically discover insights from your data



Stay connected to
your data on the go

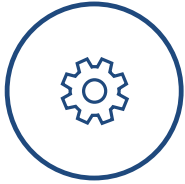


How Data Analytics can help PMs



- Spot early symptoms of **slippages** and take corrective action
- Capture the velocity of work, better timeline estimates
- Analyze project issues and risks, **minimize the impact on results**
- Prioritize & monitor potential issues, create solid **risk response** strategies
- Managers are better equipped with **Interactive BI Reports**
- **End-user analysis** of Sales, Finance, Supply SCM, HR, and other dashboards
- **Helps in forecasting** the budget, project completion time, and much more

Business Intelligence Use Cases



Operations

Predictive maintenance
Demand forecasting
Operational efficiency
Inventory optimization
Operations anomaly insights
Quality assurance
Connected devices and smart buildings
Supplier and spend insights



Marketing

Personalization
Customer insights
Churn analytics
Dynamic pricing
Product innovation
Marketing optimization
Product recommendation



Finance

Finance forecasting
Fraud management
Risk management



Workforce

Employee insights
HR insights
Resource matching and planning



Service

Intelligent contact center
Patient care and healthcare analytics



Sales

Lead and opportunity scoring
Sales insights



Customer momentum: Power BI

RefineM



Retail and Consumer Goods



Discrete Manufacturing



Government and Education



Healthcare



Banking and Financial Services



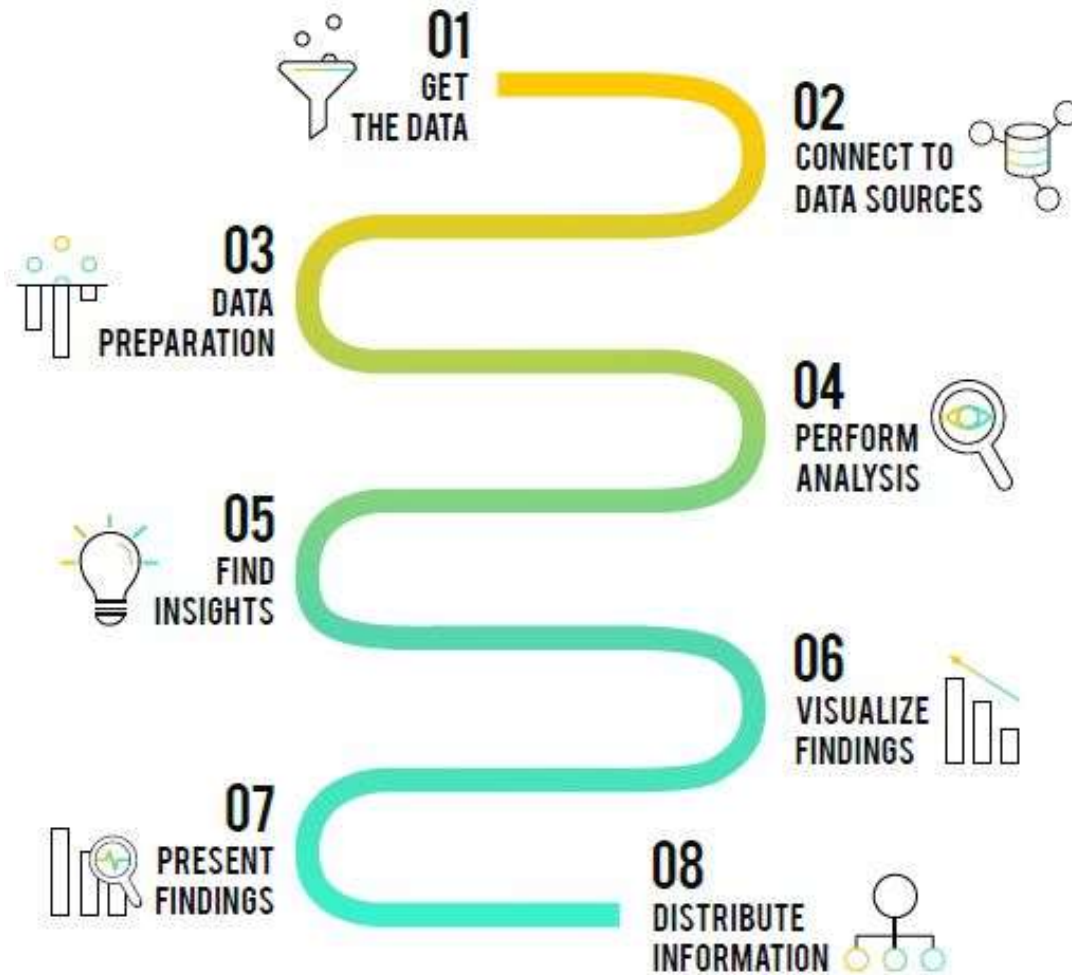
Professional Services



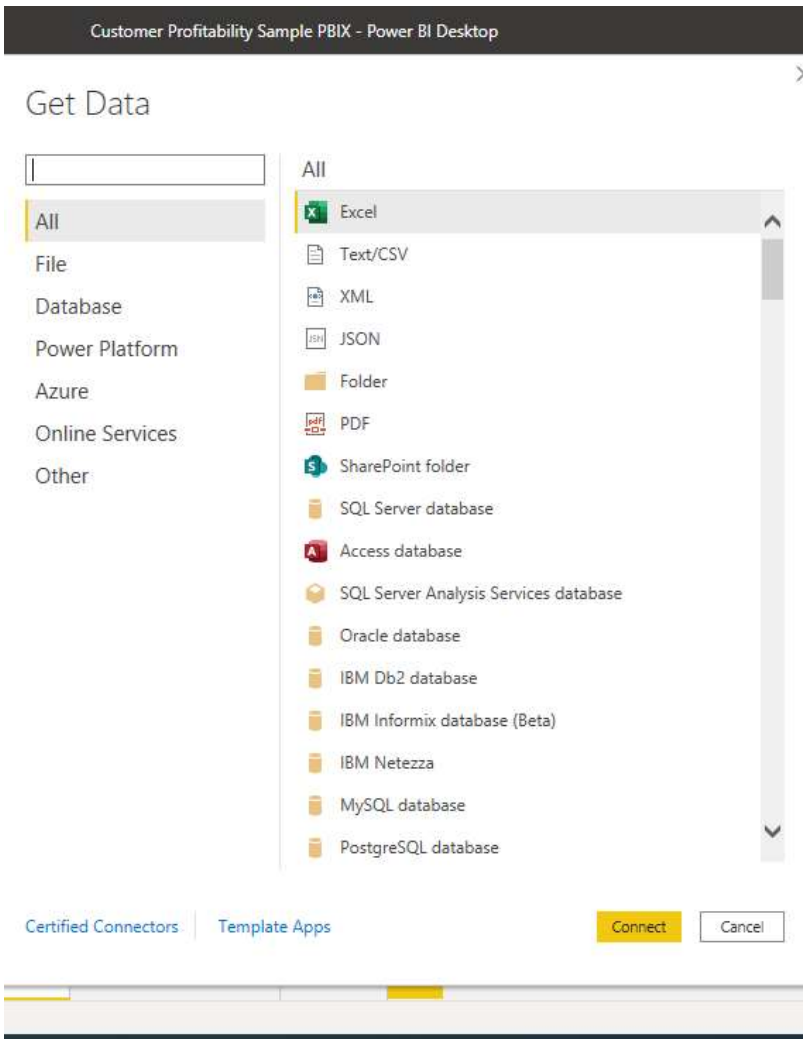
Technology Systems & Services



BI Project Life Cycle



Data Sources



- The Power BI team is continually expanding the data sources available to Power BI Desktop and the Power BI service.
- PowerBI can connect to various ERP Source Systems, Data Warehouses, Azure, Flat files, Online , Services and many more.
- Power BI Desktop Application can be downloaded and installed for free on your local computer
- Power BI Service supports report editing and collaboration for teams and organizations



Data Sources – Integration with Jira

marketplace.atlassian.com/apps/1221150/power-bi-connector-for-jira?hosting=cloud&tab=overview

Power BI Connector for Jira

POWER BI CONNECTOR FOR JIRA

- Connectors
- Templates
- Data Relationships
- Documentation
- Support Request
- Tokens
- Administration

Create Power BI Data Source

Name*

Description

[Share settings](#)

Jira Software global filters

Projects

Boards

Sprints

Search field

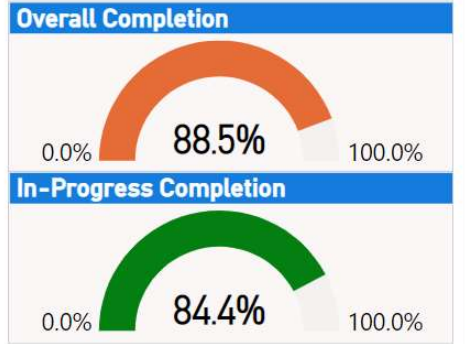
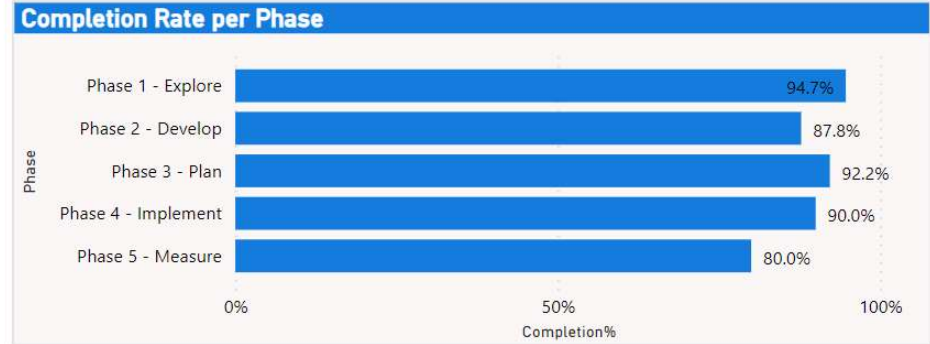
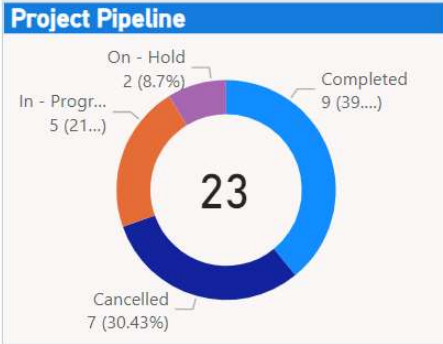
Jira Work Management Jira Software

+ <input type="checkbox"/> Boards	Applied filters: 1 PROJECTS <input checked="" type="checkbox"/> 0 BOARDS <input type="checkbox"/> 0 BOARDS TYPES <input type="checkbox"/>
+ <input type="checkbox"/> Sprints	Applied filters: 1 PROJECTS <input checked="" type="checkbox"/> 0 BOARDS <input type="checkbox"/> 0 SPRINTS <input type="checkbox"/> 0 SPRINTS STATES <input type="checkbox"/>
+ <input type="checkbox"/> Board Sprints ↗	Applied filters: 1 PROJECTS <input checked="" type="checkbox"/> 0 BOARDS <input type="checkbox"/> 0 SPRINTS <input type="checkbox"/> 0 SPRINTS STATES <input type="checkbox"/>
+ <input type="checkbox"/> Board Issues ↗	Applied filters: 1 PROJECTS <input checked="" type="checkbox"/> 0 BOARDS <input type="checkbox"/> 0 BOARDS TYPES <input type="checkbox"/> 0 FILTER BY JQL <input type="checkbox"/>
+ <input type="checkbox"/> Issue Sprints ↗	Applied filters: 1 PROJECTS <input checked="" type="checkbox"/> 0 BOARDS <input type="checkbox"/> 0 SPRINTS <input type="checkbox"/> 0 SPRINTS STATES <input type="checkbox"/> 0 FILTER BY JQL <input type="checkbox"/>

<https://marketplace.atlassian.com/apps/1221150/power-bi-connector-for-jira?hosting=cloud&tab=overview>

Project Management Dashboard

2021 2022 2023 2024 2025

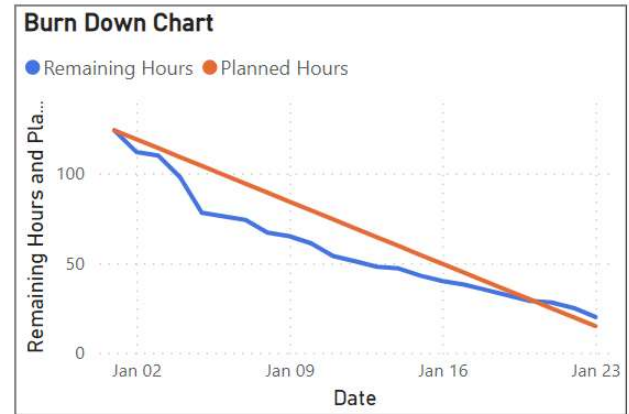
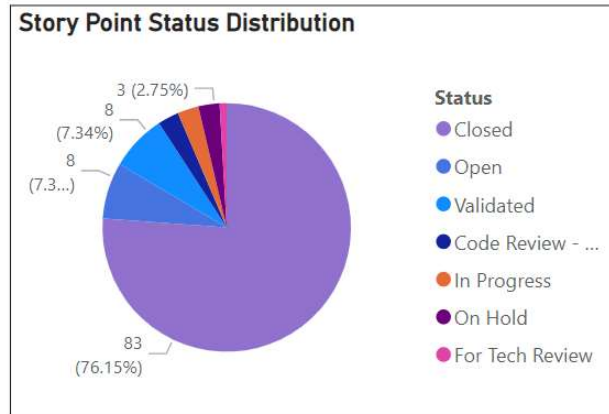
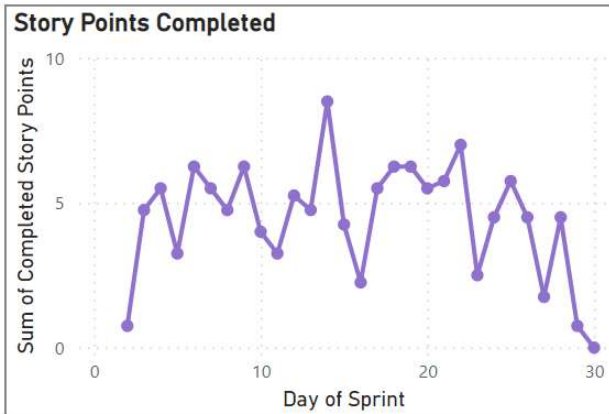
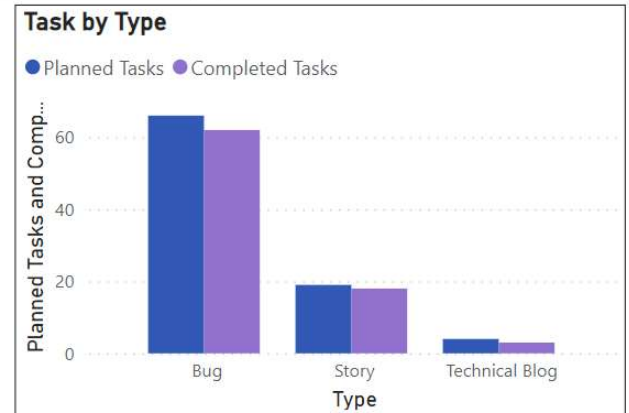
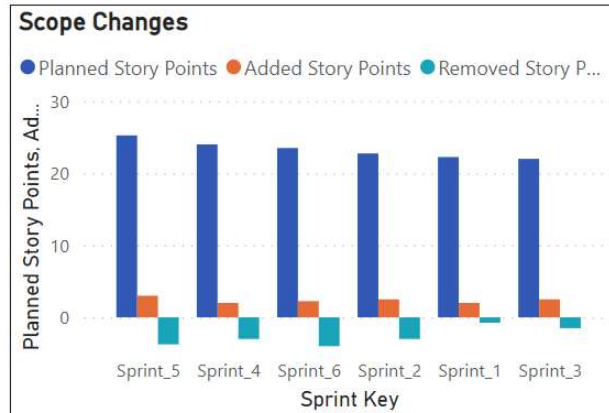
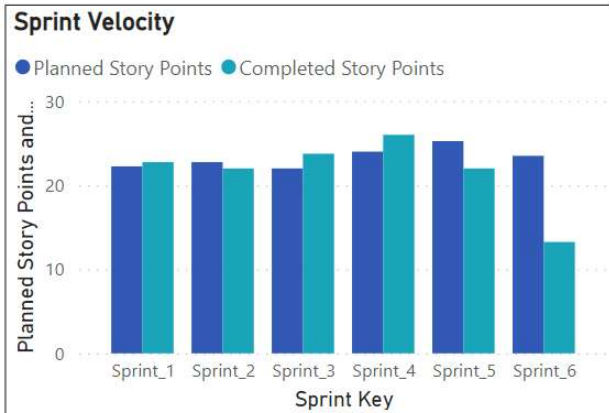


Project Name	Department	Start Date	End Date	Status	Project Benefit	Project Cost	Completion%
Rhinestone	Admin & BI	January, 2021	January, 2021	In - Progress	\$8,443,980	\$3,648,615	77.0%
A Triumph Of Softwares	eCommerce	January, 2021	January, 2021	Cancelled	\$9,012,225	\$4,018,835	80.0%
Remembering Our Ancestors	Sales and Marketing	January, 2021	January, 2021	Cancelled	\$8,719,006	\$5,285,864	75.0%
Skyhawks	eCommerce	January, 2021	January, 2021	Completed	\$8,630,148	\$5,785,601	100.0%
The Blue Bird	Warehouse	January, 2021	January, 2021	Completed	\$9,078,339	\$4,285,483	100.0%
The Coding Master	Sales and Marketing	January, 2021	January, 2021	In - Progress	\$8,504,224	\$3,326,031	77.0%
Fierce, Inc.	Warehouse	January, 2021	January, 2021	Completed	\$9,014,448	\$4,557,606	100.0%
Mo-Money Masterclass	Warehouse	January, 2021	January, 2021	Completed	\$8,674,613	\$3,190,009	100.0%
A Salute To New Workers	eCommerce	January, 2021	January, 2021	In - Progress	\$9,072,551	\$2,534,102	93.0%
Total					\$203,756,614	\$93,941,527	2036.0%



Sprint Management Dashboard

Project All	Sprint_Key All	Total Worked Hours 519	Story Points 130 Completed 140 Planned	Tasks 83 Completed 89 Assigned
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Team Management Dashboard

Resource Type

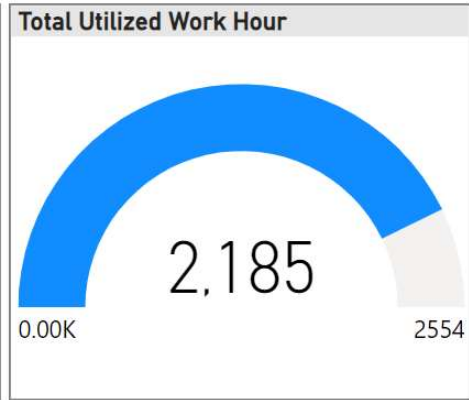
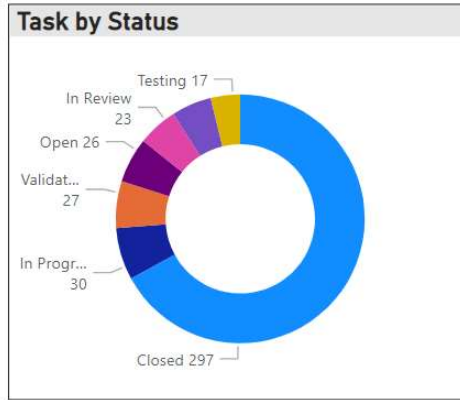
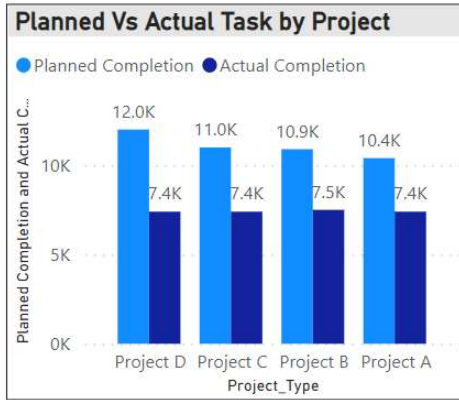
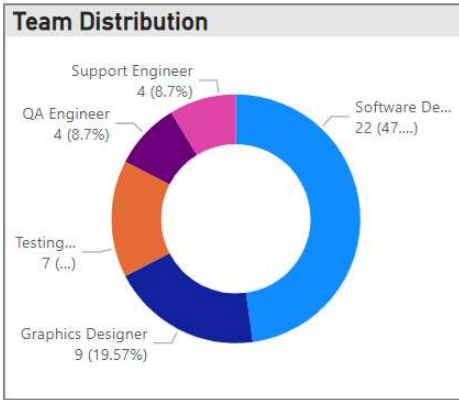
All

Project

All

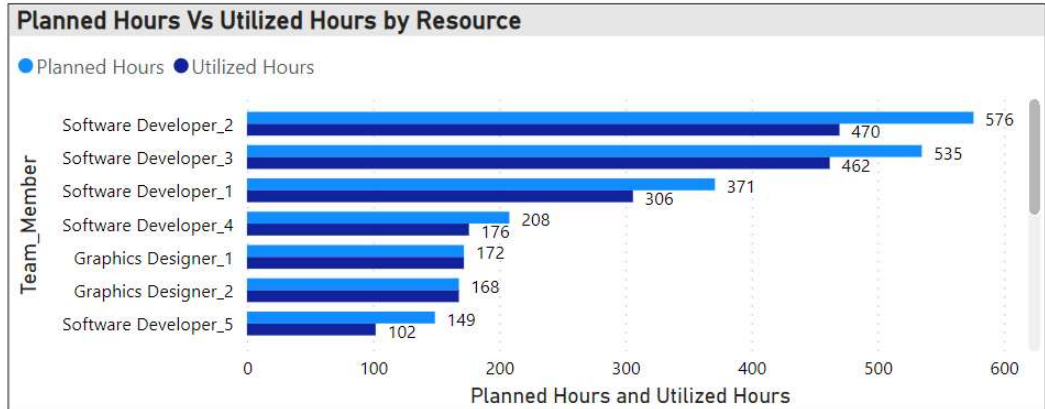
Filters

Total Resource	Availability	Time Elapsed	Flags Raised	Overall work progress
46	91.30%	85.54%	3	



Task Summary by Resource

Resource	Planned Tasks	Closed Tasks	Utilized Work	Completion%
Graphics Designer_1	14	14	1	100.00%
Graphics Designer_2	14	12	3	85.71%
Graphics Designer_3	1	0	1	0.00%
QA Engineer_1	8	6	2	75.00%
Software Developer_1	66	43	5	65.15%
Software Developer_2	101	74	4	73.27%
Software Developer_3	110	72	3	65.45%
Software Developer_4	41	26	3	63.41%
Software Developer_5	41	19	3	46.34%
Total	443	297	7	67.04%



Sales Dashboards



Margin %

44%

By Product Sub Group



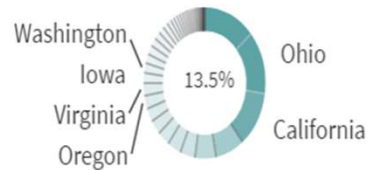
Margin Amount Over Time



TY vs LY Sales

68%

By State



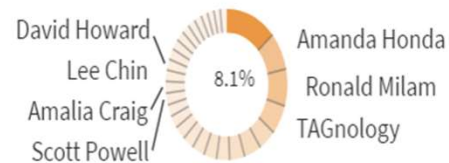
Sales Over Time



Sales vs Budget %

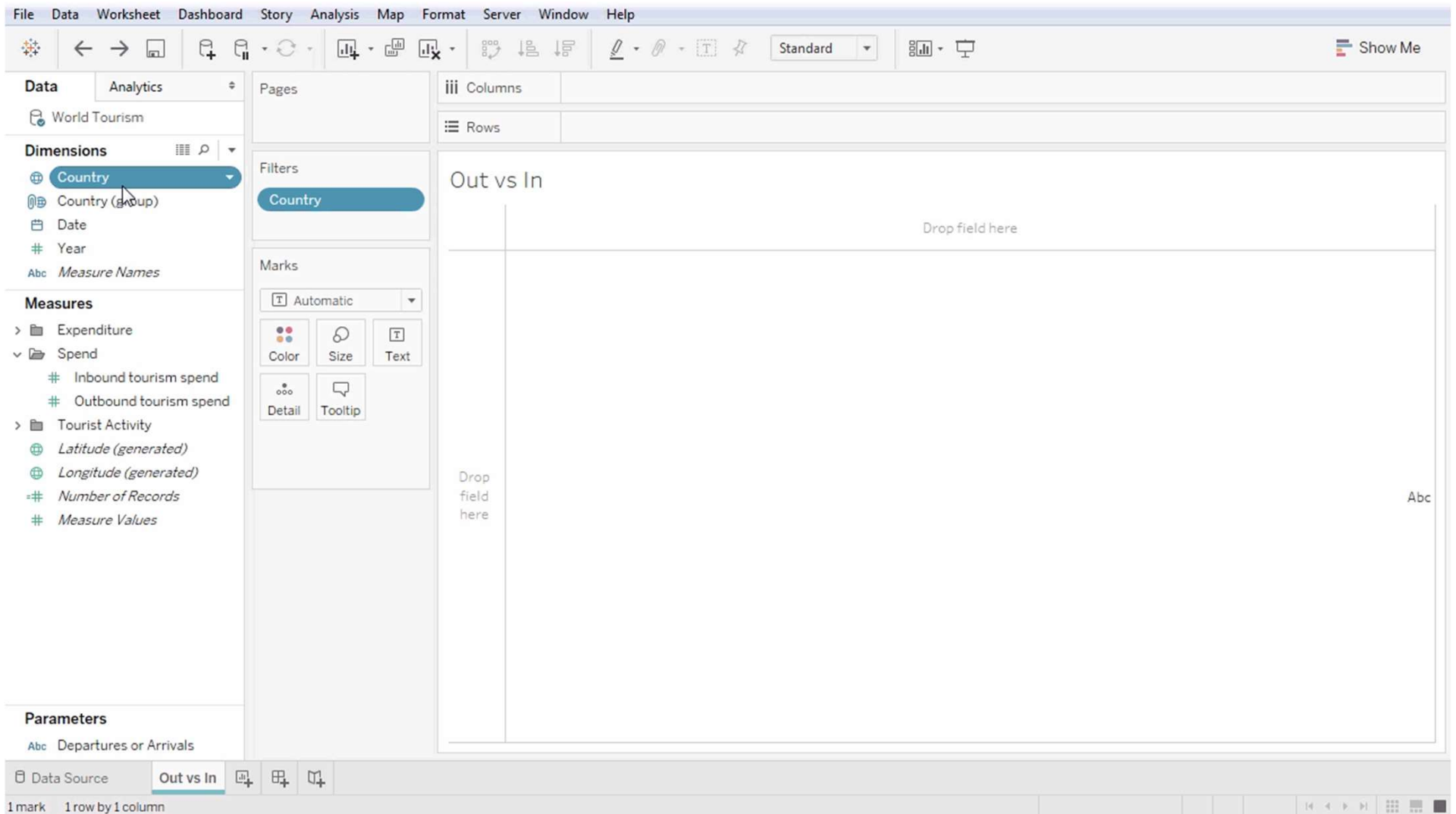
113%

By Sales Rep



Budget Over Time





<https://marketplace.atlassian.com/apps/1221150/power-bi-connector-for-jira?hosting=cloud&tab=overview>



The winner gets free access (100% discount) to one of RefineM's products of their choice (listed below) or a free three-month bundle of all three BI tools self-paced courses from Lagozon (includes Qlik, PowerBI, and Tableau)

1. Essential Gear for Project Managers (\$89)
2. PMP Exam Prep Simulator – 3 months (\$100)
3. Agility Assessment – 3 months (\$99)
4. PDU Bundle – 2 months (\$98)
5. Self-Paced Online Courses (\$100 each)
 - a. Agile Fundamentals, or
 - b. Project Management Fundamentals
6. Data Analytics Bundled Self-Paced learning Course with 6 modules (Qlik, PowerBI, Tableau, SQL, SSIS DWH, Core Python) – 6 months (\$100)

Conclusion



Believe it or not. A live dashboard can significantly contribute to project management !!

It's common for project managers to at times manually calculate the completion percentage, track the status of all the to-do items, and monitor the spending. Not to mention that project managers need to make slides and charts to update the status to senior leaders.

It's not just a tool that generates fancy charts. Project managers can adopt the dashboard to monitor project delivery and spending.

When the whole project team — including executors, project managers, and senior leaders — can access the dashboard, it surely contributes to smooth and effective communication.

Upcoming Training in Data Analytics



Power BI in a day

Course Details:

January 25, 2023, 08:00 - 15:30 Central Time
Feb 22, 2023, 08:00 - 15:30 Central Time
Mar 22, 2023, 08:00 - 15:30 Central Time

Where: Over the Web

Format: One full day

Fee: \$295 until 2 weeks before the start date, \$400 afterward

Group discounts are available up to 30%.

Description: This **1-day** hands-on workshop covers all the capabilities of PowerBI to solve business problems and improve operations. Our hands-on approach helps you arrive at your goals faster, with more confidence, and at your own pace.

Course Objectives: After completing the course, attendees will be able to

- Understand the fundamentals of Data Analytics.
- Connect to, import, and transform data from a variety of sources.
- Define business rules and KPIs.
- Explore data with powerful visualization tools.
- Build reports with PowerBI.
- Share dashboards with your team and business partners and publish them on the web.

Agenda:

- Introduction to PowerBI
- Import Data into PowerBI
- Explore PowerBI Desktop
- Building Reports in PowerBI
- Exploring Power Query
- Data Modeling in PowerBI
- Introduction to DAX in PowerBI
- PowerBI Service
- Sample Project: Finance Data Analysis

Who Should Attend: This workshop is ideal for anyone passionate to learn and enhance skills in data analytics.

<https://refinem.com/dashboard-in-a-day-powerbi/>

How do I Earn PDU for this Webinar



1. Log in to ccrs.pmi.org and Click on “Report PDUs” link.	
2. Click “Courses and Training” and Input the following:	
PDU Claim Code	39908XLRRH
Activity Name	<i>“Data Analytics for Project Managers”</i>
Provider	“RefineM LLC”
Date Started/Completed	January 12, 2023
Contact Person	NK Shrivastava
Contact Phone	(417) 763-6762
Contact Email	Trainings@RefineM.com
PDUs	1.00 Ways of Working.

**Please claim your PDU by end of January 2023.
Claim code will expire after that date.**



Training Opportunities from RefineM





Agile Courses	Over the Web
Data Analytics with PowerBI	Feb 14- Feb 17
Backlog Grooming for Agile Requirements	Jan 20
Business Requirements for Agile Projects	Feb 10
Agile Fundamentals	Jan 17- Jan 18
PMI-ACP® Exam Prep	Jan 17- Jan 19
Agile for Waterfall/Operational Work	Feb 17
PMP® Exam Prep	Feb 04- Mar 2
Project Management Fundamentals	Feb 7
Recipe to Deliver Projects Successfully	Feb 3
Agile Leadership	Feb 9
Leadership Skills for Project Managers	Jan 27

Contact Us



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