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TT 01 Simple, Streamlined Earned Value Management for Microsoft Project

Explore the latest software solution from forProject Technology, Inc. (FTI) providing “*Simple, streamlined earned value management for Microsoft Project*”. Although Microsoft Project is by far the most widely-used planning and scheduling tool, there are some who believe that it cannot support an effective Earned Value Management System (EVMS) process. We beg to differ. This presentation will demonstrate how FTI’s *forProject™* software expands the capabilities of Microsoft Project to support government and industry Earned Value Management Systems (EVMS) guidelines including ANSI 748-A and OMB A-11. We will also address the reasons organizations sometimes struggle with EVMS implementation using Microsoft Project and show how our tools and implementation approach help to address these issues. Using both desktop and web-based modules, the *forProject™* software works seamlessly with Microsoft Project to support EVMS

requirements. With *forProject™* software, your organization can quickly implement EVMS capabilities using the Microsoft tools you already know, avoiding an expensive migration to so-called “high-end” EVMS tools. The result? Faster implementation, reduced training and deployment costs and higher user acceptance are the benefits you can achieve. Whether your organization is facing new EVMS requirements or you are looking for ways to simplify or streamline your existing EVMS process, you will be interested to see our latest technology and to learn how you can implement an effective EVMS using Microsoft Project.

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Stuart P. Trahan is Chief Technology Officer of forProject Technology, Inc. With over 20 years of experience, Mr. Trahan is considered a leading subject matter expert in Earned Value Management Systems (EVMS), Integrated Master Scheduling (IMS) and project management software design and implementation.

An expert in the application of Microsoft Project, Mr. Trahan was the founder of Compliance Software Technology, Inc. (CSTI) and the original designer of the *forProject™* software suite. He has implemented IMS and EVMS solutions for clients such as United Defense, Teledyne Ryan, Northrop Grumman, Boeing, Honeywell, ITT Industries, Computer Sciences Corporation, Lockheed Martin and many more.

TT 02 Variance Analysis Toolset

The Variance Analysis Turnaround Document report in MPM is used widely throughout the industry. It provides cost and schedule variances by WBS for the current, cum-to-date and at complete periods. It's a popular and very effective tool in helping compile Variance Analysis at more detail WBS levels for Format 5 CDRL requirements. The Variance Analysis Toolset provides added value to your company's investment in MPM by giving the CAM more detailed information on the VAR report, so that he/she can do a better job analyzing variances. What the Variance Analysis Toolset provides is the same cost and schedule variances as MPM Variance Analysis Turnaround Document only it provides these Variances by Element of Cost – which provides the Manager with much more detail for variance analysis on a single report. For each WBS it shows the current period, cum-to-date and at complete variances by Element of Cost and then summarizes these variances into summary lines for each period – maintaining a very similar and easy to use report format. In addition, the Variance Analysis Toolset creates an Excel Workbook by Manager Name/Report Period and each WBS element is created on a separate worksheet within the Manager Workbook. There is no need for a large amount of scrolling to view other WBS elements within the report. Simply select worksheets within the Manager workbook to view the different WBS elements in the report. This presentation provides a detail look into the Variance Analysis Toolset and all of its user friendly features. With CBT Workshop's EVMS and Software expertise, the Variance Analysis Toolset is a good example of the different kinds of custom reporting and interfaces that can be provided for your company.

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Michael Franks is a senior associate at The CBT Workshop, one of the largest service providers for the skilled Earned Value Management System (EVMS) support. Michael has over 25 years experience in Project Management, Resource Management and EVMS. Michael provides expertise in implementation, training and continued support in all areas of EVMS requirements. Michael has advanced expertise in MPM, Microsoft Project, Crystal Reports, Visual Basic, MSAccess and Excel. Michael has developed custom reports and custom interfaces for many customers in the industry. During 11 years as Supervisor of Program Controls at Hughes Aircraft, Michael was responsible for directing the daily business operations for the program office of a major defense satellite program in an earned value environment. Among many program office responsibilities, he consolidated, analyzed and audited earned value inputs from functional organizations in preparation for submitting the Cost Performance Report to the customer. Looking for a change in careers, Michael went on to spend 15 years at Microframe Technologies and Business Engine in the Professional Services Organization providing implementation, training and customization for all of their software applications for customers around the world.

TT 03 Salting the Mine and Nine Other Brilliant Techniques You Can Use to Hide Project Failures and How Steelray Project Analyzer Will Spoil Your Fun

During the American Gold Rush, scammers would employ a technique called “salting the mine.” The scammers would load a shotgun with gold dust and fire into the sides of the mine, making it look like an attractive purchase for would-be marks. After purchasing the mine, the victims would discover that under the glittering surface there was only rock and dirt. A similar technique is employed in Project Management with projects in serious trouble. Through the skillful addition and deletion of milestones, a project that is actually in trouble can be made to look like a shining success story. This paper will present this and nine other techniques that (intentionally or not) make it harder to spot trouble in a project and show how the use of a project analyzer like Steelray Project Analyzer can easily uncover problems.

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Brian Leach is the founder and Managing Director of Steelray Software, a leading provider of project management software solutions. Brian has managed projects for over 20 years and brings industry experience gained in the Computer Hardware (Harris, IBM), Automotive (Ford Motor Company), Telecommunications (Motorola), and Open Source (Cygnus, Red Hat) industries and sectors. At Motorola, he was an integral part of the team that developed the world's first two-way wireless text messaging device (Pagewriter 2000), which was the first wireless messaging device added to the Smithsonian National Museum of American History. Brian has performed research and development on project schedule visualization and analysis since forming Steelray Software in 2000. Brian has presented to PMI, MPA, and the Software Industry Conference.

TT 04 Cost / Schedule Integration from the Ground Up: Using the Schedule Activity as the Work Package

The most basic step in project management is the construction of the detailed schedule plan. Once completed, however, in all too many cases organizations stovepipe the construction of the performance management baseline on structures disassociated from the plan, causing labor-intensive integration involving manual effort and different toolsets to achieve a modicum of integration between the WBS, OBS, IPT and schedule activities at a very high level after the fact. For many years the largest commercial multinational corporations have used earned value and performance management by basing all performance at the lowest possible level within the schedule plan, relating WBS, OBS and IPT structures to the plan in a hierarchical model that uses the schedule activity as the work package. This simple solution achieves cost and schedule performance integration from the ground up, cutting across otherwise stove-piped subspecialties that sub-optimize at the expense of the enterprise, eliminating unnecessary manual effort and suites of specialized dissociated software tools while improving the fidelity and quality of information. This presentation will demonstrate how this is achieved.

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Matthew Pitstick is the Chief Technology Officer of Safran North America, LLC, which is the exclusive representative of Safran Software Solutions of Norway for sales, support and marketing serving the United States, Canada and Mexico. His involvement with project management tools and procedures began when he was at Lockheed Martin Space Systems Company working in the Central Program Performance Management Tools group. His responsibilities were to implement, configure, deploy and maintain project management systems for 50+ programs ranging in size from one million to multibillion dollar efforts. Matt went on to work for many years in the project management software industry where he provided consulting, support, quality assurance, training and documentation and was the technical manager for the industry's leading earned value analytical applications. Matt is a recognized leader and innovator in tools and processes, having provided expertise to virtually every major aerospace and defense company and federal agency.

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Nicholas Pisano is currently the President and CEO of Safran North America. He is internationally recognized as a developer and co-developer of several project management techniques and methodologies and prior to his current position served for many years as the head of Sales and Marketing for industry-recognized leading firms in earned value management and analysis. In recognition of his contributions to acquisition research he was awarded the 1997 U.S. Defense Acquisition University Acker Award. Prior to civilian life he served in the United States Navy for over 22 years specializing in information technology, acquisition, project, and business management. During his duty he received numerous personal awards, citations and commendations. He completed his career on the staff of the Undersecretary of Defense for Acquisition and Technology where he developed new project management processes and participated in the development of acquisition policy. Mr. Pisano holds a B.S. from the University of Maryland, an M.S. in management from Pepperdine University, an M.A. from the Combat Studies Institute of the Army Command and General Staff College, and is a graduate of the senior executive program of the Colgate-Darden School of Business of the University of Virginia. He is also a former board member of the PMI College of Performance Management.

TT 05 TruePlanning by PRICE Systems — Solutions for Capital Planning and Investment Control (CPIC)

As an individual responsible for your agency's programs, you need an effective estimation tool kit. Whether you are an analyst tracking progress and making tradeoffs, a project manager responsible for deadlines and deliverables, a program director managing several projects, or part of an oversight group that has to audit progress, using a reliable estimating tool is critical to what you do. This presentation will introduce and demonstrate the speed and accuracy of TruePlanning by PRICE Systems. We will show you how TruePlanning can help you build your initial baseline with confidence and provide

you with a fully auditable, traceable, history of changes throughout the project lifecycle. We will review how tradeoffs can be done quickly allowing you to assess the impacts to your cost and schedule. You will also see how using TruePlanning will help you become fully compliant with OMB and GAO guidelines. TruePlanning is just as valuable for managing small projects as it for managing large programs and multiple-program portfolios where Earned Value Management is a requirement. Your results will arm you with the confidence you need that your estimates are accurate, valid, and defensible – all especially important as you and your manager are walking up the steps of Capitol Hill.

Bill Mathis, PRICE Systems

Bill Mathis is the Senior Director in PRICE Systems' Government Solutions Division. His organization provides Cost Management Solutions that integrate PRICE Systems' TruePlanning® tools, TrueMethods™ and a world-class team of consultants and subject matter experts. His organization provides independent cost estimating, program cost analysis, earned value management (EVM) and predictive EVM to Government Agencies as well as their oversight stakeholders and industry contractors.

Mr. Mathis joined PRICE Systems in February 2003 to help develop Washington DC Government Solutions operations. He has over 25 years experience in Program and Portfolio cost, schedule and risk management experience. Bill has expert-level knowledge in portfolio results-chain and benefits realization techniques, earned value management, program scheduling, and life-cycle cost/schedule risk management developed through service to numerous government and commercial customers worldwide. He is regularly asked to speak on a range of program management processes and techniques at government and industry leadership forums. He is an active advisor to the Government Accountability Office in the development of the recently released GAO Cost Assessment Guide. Mr. Mathis is also a participant in NDIA's Civilian Agency / Industry Earned Value Working Group, the Civilian Agency EVM Community of Interest, and Project Management Institute College of Performance Management. He holds MS and BSE Degrees in Mechanical Engineering from Arizona State University and MBA from the University of Phoenix.

TT 06 PM Metrics Schedule Detective: You Now Have Time for Analysis

I have been a scheduler for 16 years and I hate it when someone knows more about my schedule than I do. As an analyst, how do I quickly make sense of the many schedules coming in every month? More important, how do I come up with the questions I will need to ask? Over the years I have developed the Schedule Detective to help me do a better job. It runs hundreds of tests, in seconds, and gives me the information I need to analyze a schedule regardless of whether I am the scheduler or the customer.

This presentation will show the large amounts of information that is available in the schedule and how to sift through it to see the "Forest for the Trees". The Schedule Detective does the grunt work. Analysis requirements are different from project to project and within the same project from phase to phase. . Hundreds of queries are performed on thousands of activities in less than a minute. The information is organized into multiple levels and geared towards producing reports. Most analysis is one dimensional in that it takes a snapshot of the schedule The Schedule Detective, goes further, it discerns trends over time and extrapolates performance into the future. New Modules compare schedules, performs the DCMA 14 point assessment, and generates BEI charts.

Even though this is a Tool Track presentation, everyone involved in scheduling will benefit from the large amount of practical information given.

John Krahula, PM Metrics • johnmtnair@aol.com or info@pmmetrics.com

John has over 19 years of project management experience in major commercial and government contracting environments along with extensive experience in developing and implementing project management control systems in diverse and demanding business environments such as aerospace and defense, energy, telecommunications, and municipal governments. An expert in planning and scheduling, he has developed tools for extracting data for analysis and reporting, and earned value management systems. John has a wealth of practical project management knowledge with strong technical expertise in a wide variety of software tools.

TT 07 A Portfolio / Project Management Approach to the Challenges of Capital Planning & Investment Control (CPIC)

Managing the Capital Planning and Investment Control (CPIC) is a major challenge faced by many federal agencies. Decision makers are suffering due to the lack of a formal capital planning structure for the selection, control, and

evaluation of capital investments. The purpose of this presentation is to discuss how to address CPIC challenges through an integrated project/portfolio management solution that allows managers and key stakeholders to effectively manage and track their investment portfolios throughout the investment lifecycle.

Farzana Saleem, Manager, Projility, Inc.

Farzana Saleem, a Manager at Projility, has extensive IT project management experience. She's succeeded at managing and deploying both IT and project management solutions to organizations across diverse industries. Her focus has been on providing the best viable solution that exceeds requirements to her clients.

Farzana started her career in information technology for a government research facility. Her work as a network systems analyst provided her with valuable knowledge and expertise that catapulted her to the next chapter of her career in project management. She's succeeded at delivering enterprise project management solutions using Microsoft tools that range from small pilot deployments to enterprise-wide rollouts of project portfolio management solutions for multinational corporations.

Farzana is a Northern Virginia native and currently holds a Bachelors in Management Information Systems from George Mason University. She continues to pursue her education and attained a Masters in Business Information Systems from the George Washington University.

TT 08 Building the Integrated Cost and Performance Management System

The ability to provide Project Managers with meaningful Cost, Schedule and Performance information involves the collection, correlation, integration, and accumulation of volumes of data from many diverse sources both internal and external. Well defined interfaces must be established between the Performance Management System, the accounting system, scheduling, resource planning and budgeting systems. Subcontractor data integration is typically another major consideration of the overall integration challenge. This session will explore and discuss this rather complex project management systems environment. The use of highly flexible, user configurable "integration tools" coupled with the open architecture of an effective and reliable performance management system will be demonstrated as a model for automating the periodic process of data collection, integration, accumulation and web based reporting. A Systems Integration Planning Architecture will be introduced and the process of "Building" the integrated system will be presented.

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Bob Brewington has had an extensive background in the Defense Industry having held management positions in Business Information Systems, Financial Management and Project Control. In the early 90's he left a corporate management position to form his own Systems Integration and consulting company. Bob is currently a Business Systems Consultant and CEO of Business Support Associates Inc. where they have specialized in Integrated Project Management Information Systems for the past 15 years. He has concentrated in the area of Earned Value Management Systems working with defense contractors and government agencies. In addition, his company helps many contractors comply with NASA financial management and cost reporting requirements.

TT 09 Using Primavera ProSight to Improve EVM Maturity

Government organizations face a challenge in implementing and maturing their EVM process. Efficiently meeting internal and external (OMB) requirements can be a difficult task. Primavera ProSight 7.5 provides an ideal solution for organizations seeking to enhance their use of EVM. The Fast Track for Earned Value Investment Analysis (EVIA) is a standard configuration that allows organizations to quickly and easily begin assessing and managing their portfolios. The flexibility of the tool allows it to expand as an agency's processes mature. This presentation will demonstrate the use of Primavera ProSight and the EVIA Fast Track in supporting and improving the use of EVM in organizations.

Bill Gehrke • 571.216.8277 • fax 571.227.7801 • bgehrke@primavera.com

Bill has ten years of experience providing consulting services to clients in multiple industries, including government, non-profit, and financial sectors. He has experience designing and implementing project and portfolio management systems, performance and talent management systems, and financial systems. Throughout his career, Bill has worked closely with clients to tailor solutions to the specific needs of the customer, creating flexible solutions that support the organizations current needs and can be adapted to evolving requirements.

As a project manager at Primavera, Bill has worked with multiple federal government and private clients developing and implementing configurations using the Primavera ProSight product. He has focused primarily on providing Capital Planning and Investment Control (CPIC) and Earned Value Management (EVM) solutions to government agencies looking to improve their internal controls and their ability to meet mandated reporting and oversight requirements. Bill has also designed custom integrations for multiple clients between Primavera ProSight and other applications.

Courtney Virtue • 571.246.3099 • fax 571.227.7801 • cvirtue@primavera.com

Courtney is an accomplished consultant who specializes in the strategic application of project management principles to achieve client business goals and objectives. Her expertise in customer relationship management, training, business analysis, and her ability to work with technical development teams has allowed her to successfully deliver software and technology projects to clients in a variety of industries both nationally and internationally.

As a business consultant at Primavera, Courtney has focused primarily on providing Capital Planning and Investment Control (CPIC) and Earned Value Management (EVM) solutions to government agencies looking to improve their internal controls and their ability to meet mandated reporting and oversight requirements.

TT 10 Effective EVM Analysis: Techniques for Improving Management Visibility and Control

Are you struggling with earned value and preparing for an Integrated Baseline review? Do you feel it takes too long to produce reports your program team can trust? In this informative session, you will learn how to understand earned value information and the impact on your organizations. The session will help you prepare for a DCMA audit, understand the new DCMA tripwires, and help you to survive surveillance. Learn how to communicate the value of Earned Value to your organization using Deltek wlnsight. Key takeaways include how to demonstrate the value of an EVMS, how to survive surveillance, and how Deltek wlnsight helps simplify the analysis and reporting process.

John Kunzier, Deltek • 703268-6840 • johnkunzier@deltek.com

John Kunzier is a Senior Product Marketing Manager at Deltek, the leading provider of enterprise applications software built specifically for project-focused businesses. John has 20 years experience with hundreds of project-oriented organizations including government agencies, government contractors and construction/engineering firms. He has helped to develop and to implement project management, cost management and work order management solutions. John has also worked to improve process and accountability with major fortune 500 organizations. His role with Deltek is to define market requirements and to drive market and product strategy in the Enterprise Project Management space.

Ron Veronese, Deltek • 724.421.2830 • fax 724.738.0568 • RonVeronese@deltek.com

Ron is Senior System Consultant at Deltek and has been involved with the wlnsight Toolset for nearly 12 years. He has been fortunate to provide a wide range of services to wlnsight customers, including standard and custom training, onsite implementation, and technical support. In addition, he was the primary coordinator for 9 highly successful wlnsight User Group (WUG) conferences. Ron has been instrumental in integrating wlnsight with a variety of Earned Value systems and enjoys facilitating the user community in developing greater product knowledge and maximizing the use of wlnsight as a key analytical tool for CAMs, Program Control, and executive management team members.

TT 11 Performance Management: Optimize Program Performance and Profitability Using Familiar Microsoft Applications

Join us as we share best practices for managing costs, generating EVM, collaborating and reporting across multiple projects using Microsoft Office Applications. Key topics include standardization and automation of cost / schedule integration, balancing project schedule, managing resources and budget with customer requirements, while maintaining profitability on contracts and gaining competitive advantage. LMR Solutions' award winning integrated Enterprise Program Management (iEPM) solution built on the Microsoft Project Server and SharePoint platform provides a familiar user interface for managing projects and programs. Leveraging the Microsoft Office SharePoint platform, iEPM provides an infrastructure that strengthens collaboration and accountability among all levels of the organization.

- Empower managers and project teams to make timely, informed decisions by giving them Web-based access to real-time business-critical data.

- Enhance the interface between Engineers, CAMs, Subcontractors, Planners/Schedulers and Financial Analysts to enable a cohesive team with standardized reports and processes.

- Increase participation in the project management process by enabling teams to easily manage, track, and report on their project activities such as tasks, issues, risks and documents through familiar tools, like the Web and e-mail.

- Help in gaining higher quality and efficiency by jointly developing and organizing a standard schedule repository with embedded process and procedures.

Learn how Raytheon Businesses, NASA Centers and NAVSEA Warfare Centers have deployed iEPM as a best practice for managing programs.

**Michelle Manimtim, LMR Solutions • 760.603.9990 • fax 858.225.0685
mmanimtim@lrmrsolutions.com**

Michelle is a Government EPM Director with LMR Solutions, a gold certified Microsoft Partner providing Program/Project management services, solutions and support. Her role within LMR Solutions includes identification and deployment of project management best practices, mapping business processes and requirements to solution architecture, establishing user adoption plans, and project and program leadership/oversight.

Michelle has led successful EPM deployments for Raytheon, Jacobs Engineering, US Navy, General Atomics, ViaSat, NASA, and a number of other LMR Solutions' clients. She developed and delivered EPM Solutions deployment and solution architect services which include: requirements/design, development, training and support for the LMR Solutions clients. These solutions improve Enterprise Schedule Management, Resource Management, Financial Management (EVM), and Data Security and Control. The Microsoft EPM solution integrates with other Line of Business applications to provide a common interface to merge IMS data into applications such as MPM, SAP, and WinSite. The Microsoft EPM platform enhances collaboration across the entire program including subcontractors and customers. Michelle continues to be a leader in the development and deployment of Best Practice Project Management processes and policies that support their EPM solution.

TT 12 “Intelligent Schedule Optimization”: Evolving from the “What?” through the “So What?” to the “Now What...?”

Modern scheduling tools have become highly powerful over recent years but still fall short of reporting beyond the “**what**” – we are still challenged with the “**so what** does it mean” and “**now what** do we have to do to improve it”. While extremely powerful at calculating the likes of end dates, delivery times for milestones & required resource levels for example, scheduling tools fall short of providing an insight into how in the light of scope change, risk & uncertainty, can a project be optimized. Such optimization should go beyond just improving a completion date and instead should consider increasing the chance of success and reducing the risk exposure present. This presentation walks through a proven methodology of integrated schedule validation & optimization. The end result is an optimized schedule that is structurally sound, representative of the scope, is risk adjusted, has relevant contingency applied & satisfies the stakeholders desired confidence level for success. The approach ensures a strong tie between scope/deliverables and the project plan together with a sound basis against which to move forward into execution using EV performance management techniques for accurately tracking status and performance.

Key topics include:-

- 1) Schedule validation: key aspects to consider when checking the maturity of a schedule
- 2) Risk loading: how to risk load a schedule, adequately accounting for both schedule uncertainty & risk events.
- 3) Risk exposure reporting: how to interpret the results from a quantitative risk analysis
- 4) Schedule optimization: retaining agreed upon completion dates, the schedule is optimized through targeted and intelligent reduction of risk hot spots providing a much higher chance of completion on time.

Dan Patterson

With over fifteen years of experience, Dr. Dan Patterson is recognized as a thought leader and visionary within the project management industry. With a focus on project analytics and risk management, Dan was responsible for developing a now widely accepted integrated qualitative/quantitative approach to risk analysis. Depth of knowledge in this area covers the full project lifecycle from bidding and project initiation through execution & closeout. Extending this passion for project performance tracking across multiple industries including A&D, government, energy and EPC, Dan also has vast experience in the area of EVMS and project performance management.

Dan is the CEO and co-founder of Acumen PM (acumenpm.com), a project analytics company based in Austin, TX. Prior to this, Dan was Pertmaster executive VP of Americas, responsible for the Pertmaster Americas business unit.