

# **OPM3 Assessment Tool**

Version 2.1, 2018

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# **File Structure**

الاسم	تاريخ التعديل	النوع	الحجم
All Files Workspace.xlw 🔠	۲:۱۷ م ۲:۱۷	Microsoft Office Excel Workspace	۳ کیلوبایت
HR Representative.xls 🕮	•۲۲:۳۰ م ۱۲:۳	Microsoft Office Excel 97-2003 Worksheet	٤١٥ كيلوبايت
Leadership.xls 🕮	۱۲:۳۳ م ۲۸/۰۰/۱٤	Microsoft Office Excel 97-2003 Worksheet	۰۱٫۲۲ کیلوبایت
Line Managers.xls 🖷	۱۲:۳۳ م ۲۸/۰۰/۱٤	Microsoft Office Excel 97-2003 Worksheet	٦٤٦ كيلوبايت
Main.xls 🕮	۲:۱۷- م ۳۸/۰۰/۱۷	Microsoft Office Excel 97-2003 Worksheet	۱٫۸٤۱ کیلوبایت
Portfolio Managers.xls 🖳	۱۳:۳۱ م ۲۲/۰۰/۱۴	Microsoft Office Excel 97-2003 Worksheet	٦٧٦ كيلوبايت
Process Owner.xls 🕮	۱۳:۳۱ م ۳۸/۰۰/۱٤	Microsoft Office Excel 97-2003 Worksheet	۱٫۷٤۳ کیلوبایت
Program Managers.xls 🕙	۱۲:۳۲ م ۱۲:۳۲	Microsoft Office Excel 97-2003 Worksheet	۹٦۱ کیلوبایت
Project Managers.xls 📳	۱۲:۳۲ م ۱۲:۳۲	Microsoft Office Excel 97-2003 Worksheet	۹۳٦ کیلوبایت
Team Members.xls 🕮	١٢:٢٤ م ٢٤/٥٠/١٢	Microsoft Office Excel 97-2003 Worksheet	٤١٥ كيلوبايت
Training Process Owner.xls 嚠	۱۲:۲۳ م ۲۸/۰۰/۱٤	Microsoft Office Excel 97-2003 Worksheet	٤١٥ كيلوبايت

The tool consists of a set of files, one main consolidation workbook, and 9 role-based assessment workbooks. The main file is the central control interface for consolidating total scores and generating assessment reports. Moreover, Excel offers the feature of creating workspace file that saves the set of open files if you have work in progress so that you can save all files and reopen all of them at once to resume work later instead of opening files one by one.



Tabs in the main workbook correspond to each set of assessment questions in a worksheet, classified by domain and by SMCI stage, along with result reports tabs, and a score calculator tab.

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You can simply switch between the main workbook and the role-based workbooks from Excel by navigating to the 'View' menu, under the 'Window' group, where you can find the 'Switch Windows' button. Also from this same location you can find the 'Save Workspace' button if you want to save current work in progress as one workspace file to resume work later.

# **Use of Macros**

	9-1						Main.xls [Compatibility Mode] - Microsoft Excel —	o ×
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23 24 25							d protected, and you can only enter values in the input cells highlighted in light blue color	
Ready		r / Score C	alc OEs	PiS 🖌 PiM 🖌	Pic / PiI / P	qS ∕PqM	/ PaC / PaI / PfS / PfM / PfC / PfI / OEs Results / OEs Results AR / Pi Results / Pi Results AR / Pa Results / I I IIII 100% 🕞	

Many of the functionalities of the tool use programming macros embedded in the workbooks. For that reason, you need to enable macros when you use the tool. Once you open any workbook, Excel will notify you that the file contains macros and ask for your permission to enable them. Our macros are certified by a self-signed digital signature certificate with our firm name. You can simply select to trust all documents from this publisher so that you are not warned again each time you open one of the tool workbooks. If you found any other unsigned macro included in the files then you shouldn't trust it because it could have infected you from somewhere else.

## **Role-based Workbooks**

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For the role-based workbooks, each of them contains only questions relevant to that role, so that you have a reduced/filtered set of questions when interviewing each role. The above screen capture for example is for the HR Representative role workbook. You will find in each of the role-based workbooks only tabs that contain questions for this role, however all questions related to other roles under this tab are still included for reference only, not editable, meaning that you can only score questions related to that role under these tabs. If you have more than one person for a certain role, you need to enter here the average score of all of them as one score for that role.

#### **Assessment Structure**

4	J	K	L	М	N	0	Р	Q	R 🔺
1	Role	🚽 Purpose 🔽	Evidence	Possible Score	Add. Info.	Available Score	Score 👻	Included? 👻	Note
2	Process Owner	Verify existence of the outcome of the capability	Agenda, schedule and attendees	Score - Yes/No, 3 points per process (0/6)		6	• 6	Yes	
3	Process Owner	Verify existence of the outcome of the capability	Agenda, schedule and attendees	Yes/No, 3 points per process (0/72)		72	0 3 6 72	Yes	
4	Process Owner	Verify existence of the outcome of the capability	Agenda, schedule and attendees	Yes/No, 3 points per process (0/24)		24	• 24	Yes	
5	Process Owner	Verify existence of the outcome of the capability	Agenda, schedule and attendees	Yes/No 3 points per process (0/33)		33	• 33	Yes	
	Process Owner	Verify existence of the outcome of the e Calc OEs PjS PiM	Agenda, schedule and attendees ∠PiC ∠PiI ∠PgS ∠PgM ∠PgC	Yes/No 3 points per process (0/6) ZPg1 ZPfS ZPfM ZPfC ZPf1	CEs Results COEs Results A	6 AR ∕ Pj Results ∕ Pj Results A	● 6 R ∕ Pg Result	Yes	

For any of the assessment tabs, you will find a full listing of all information related to domain, process group/lifecycle phase, knowledge area/performance domain, process/activity, capabilities, outcomes, role, purpose, evidence, possible score, additional information, and available score, which are all for reference only and not editable. There is no best practice column because best practices of processes in each domain are implied by the SMCI stage tabs. Best Practice column is included in the OEs sheet only. Next comes the scoring fields that include the given score, and whether the question is included in scope (Yes) or not included (No, meaning that the question is 'not applicable'), and a notes area. Scores are selected from a drop-down list based on the type of each question (Yes/No or Range), and values entered manually are validated based on these conditions.

4	J	K	L	М	Ν	0	Р	Q	R 🔺
1	Role 🔽	Purpose 🗸	Evidence 🗸	Possible Score 👻	Add. Info. 🖉 👻	Available Score 👻	Score 👻	Included? 🚽	Note
6	Process Owner	Verify existence of the outcome of the capability	Agenda, schedule and attendees	Yes/No 3 points per process (0/6)		6	• 6	Yes	Ē
7	Process Owner	Verify existence of the outcome of the capability.	Process document	Yes/No		3	93	Yes	<b>T</b>
	Process Owner, Leadership, Project Managers	Verify existence of the outcome of the capability.	Proof of communication	Range type 0, 1, 2, or 3		3	93	Yes No	
	Process Owner, Leadership, Project Managers	Verify existence of the outcome of the capability.	Look for multiple outputs that match the outcome.	Range type 0, 1, 2, or 3		3	93	Yes	
10	Process Owner	Verify existence of the outcome of the capability.	Process document	Yes/No		3	93	Yes	
	Process Owner, Leadership, Project Managers	Verify existence of the outcome of the capability.	Proof of communication	Range type 0, 1, 2, or 3		3	93	Yes	
	Process Owner, Leadership, Project Managers	Verify existence of the outcome of the capability.	Look for multiple outputs that match the outcome.	Range type 0, 1, 2, or 3		3	93	Yes	
13	Process Owner	Verify existence of the outcome of the capability.	Process document	Yes/No		3	93	Yes	
14 4	Cover Score	Calc OEs Pjs Pim	<mark>∕PiC ∕PiI ∕PaS ∕</mark> PaM ∕PaC ∕P	aI 🖌 PfS 🖌 PfM 🖌 PfC 🖌 P	fI 🖌 OEs Results 🖌 OEs Results AR 🗶	Pi Results 🖌 Pi Results A	R 🖌 Pg Resul	ts – I 4	

Once a certain question is set as 'not included' the score filed is set to zero and is disabled, and at the same time the available sore is set to zero so that the question is excluded from the total sums of consolidated calculation. The 'included' field works only in the main workbook, and if a certain question is set as 'not included' in the main workbook then scores in the individual role-based workbooks are not taken in account when calculating the total consolidated scores.

	J		К		L	M	N		0	Р	Q	R 🔺
1	Role	•	Purpose 🕞	·	Evidence 🔽	Possible Score 🚽	Add. Info.	-	Available Score 🚽	Score 🗸	Included? 🗸	Note
6	Process Owner	Z↓			dule and attendees	Yes/No 3 points per process (0/6)			6	• 6	Yes	=
7	Process Owner		F <u>i</u> lter by Color Text <u>F</u> ilters :	•	ment	Yes/No			3		Yes	•
8	Process Owner, Leadership, Project Managers		Process Owner	Leadership, Pro	nunication	Range type 0, 1, 2, or 3			3	•	Yes	
9	Process Owner, Leadership, Project Managers				iple outputs that match	Range type 0, 1, 2, or 3			3	• :	Yes	
10	Process Owner		<	>	ment	Yes/No			3	• 3	Yes	
	Process Owner, Leadership, Project Managers		ОК	Cancel	nunication	Range type 0, 1, 2, or 3			3	• 3	Yes	
	Process Owner, Leadership, Project Managers	o	'erify existence of the utcome of the apability.	Look for mul the outcome	tiple outputs that match	Range type 0, 1, 2, or 3			3	• 3	Yes	
13	Process Owner	o	erify existence of the utcome of the apability.	Process doci	ument	Yes/No			3	• 3	Yes	
14 4	Cover Scor	e Ca	c OEs PJS PIM	<u>/ PjC / PjI</u>	$\overline{PqS}$ $\overline{PqM}$ $\overline{PqC}$ $\overline{Pq}$	aI 🖌 PfS 🖌 PfM 🖌 PfC 🖌 PfI	OEs Results OEs Results A	R	Pj Results 🖌 Pj Results A	R 🖌 Pg Resu		

Features of the assessment tabs allow filtering/sorting by any of the listed columns. For example, you can filter by specific role to see only questions applicable to this role, or you can filter by the 'included' field to see what you included or excluded from the assessment, or you can filter by score to see capabilities that are not fulfilled (any score less than 3), or filter by color (red = less than 50% score, yellow = less than 100% score, and green = full score).

4		J	К	L		М		N	0	
1	Evidence 💽	Possible Score 🚽	Add. Info. 🛛 🔽	Available S	Score 🔽	Score	-	Included? 👻	Note	5 🔽
							₽↓	Sort Smallest to Large	st	
							Z↓	Sort Largest to Smalle	st	
								Sor <u>t</u> by Color	•	
	Verbal from interview	Range type 0, 1, 2, or 3.		3			$\mathbb{X}$	<u>C</u> lear Filter From "Scor	e"	
					Filter by	Cell Icon	-	F <u>i</u> lter by Color	· · · · ·	
								Number <u>F</u> ilters	•	
2								(Select All)		
	Documented decisions made by executives (like OPM3 assessment, process owners assigned, etc).	Range type 0, 1, 2, or 3.		3	No	Cell Icon		<b>√</b> 1 <b>√</b> 2 <b>√</b> 3		
3	, <b>r</b> ,,							····· 🖌 3		
	Verbal from interview and documented evidence.	Range type 0, 1, 2, or 3.		3		$\bigcirc$				
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	Planning documentation.	Range type 0, 1, 2, or 3.		3						
5								ОК	Cancel	
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	Interviews	Range type 0, 1, 2, or 3.		3			3	Yes		
6							+			
I4 - 4	Cover / Score Calc OES / PiS / PiM / PiC / PiI	/ PgS / PgM / PgC / PgI	/ PfS / PfM / PfC / PfI / OEs Results / OEs Re	esults AR 🔶 Pj I	Results 📈	Pj Results	AR ,	Pg Results		

Filtering by score allows you to generate a shortlist of all unfulfilled capabilities for the purpose of generating an 'improvement plan' based on the assessment results.

# **Consolidated Score Calculation**

A	В	С	D	E	F	G	Н	I	J	K	L	М	N	0	Р	Q	R
4																	
5																	
6										d the final so	ore of each	assessment	question to	be entered ir	n the		
7			Role	Weight	Sc	ore		subsequent	sheets.								
8		Leadership	D	3		0		Depending	on the energif	ia ralaa anali	aabla ta a a	atain avaatia	n aius tha a	a are of a a a	colo and		
9		Process C	)wner	3	(	0	ľ			ic roles appli Ilated score i							
10		HR Repres	sentative	2		0		tab		nateu score i		conespond	ing question.	s in the cone	sponding		
11		Training P	rocess Owner	2		0		tub.									
12		Line Mana	gers	2		0		If a certain r	ole is not ap	plicable to a	certain ques	tion, simply	score it zero	and it will b	e excluded		
13		Portfolio M	anagers	2		0		from clacula	ation.								
14		Program N	lanagers	2		0											
15		Project Ma		2		0				e person for	a certain rol	e, use the av	erage of thei	r individual s	cores to		
16		Team Men	nbers	1		0		form the ove	erall score for	r that role.							
17								Calculation	of the final s	core here is i	not simple a	verge of all i	rolas it's wa	ighted calcul	lation based		
18		Final Sco	re			0			ht of each rol		not simple a	relage of all i	10103, 113 We	ignieu calcu	ation based		
19								j									
20								For Yes/No	questions, p	ay attention	to giving 0 o	r 3 scores or	ıly.				
21																	
22																	
23			, use the below b														
24			orkbooks correspo														
25			this functionality to					l overwrite any	/ manually er	ntered values	in this cons	olidated wor	kbook. If you	ı made			
26		some quest	ions 'not included'	this will be	preserved an	d will not be	calculated.										
27																	
28								Auto Calcula	te								
29																	
30 ▲			PiS 🖌 PiM 🖌 PiC 🖌		/ /		- / /-			OEs Results		1					

After filling in scores of all role-based workbooks, you then calculate the overall consolidated scores from the main workbook through the 'Score Calc' tab. You can use the manual score calculator included in this sheet, or use the 'Auto Calculate' button. The manual calculator relies on your input for the score corresponding to each role in any specific question, which you select from the drop-down list. Based on your input, the calculator gives the final score for that specific question taking in consideration weights given to each role. Weights are fixed and not changeable, for the purpose of consistency and comparability of all calculations made by all users of the tool. Based on feedback from users, those weights may be revised in future versions. Use of the manual calculator makes it your own responsibility to check the type of scores of the question (Yes/No or Range), whether it is included or not included in the assessment, and which roles are applicable to each specific question. Manual calculation is time consuming and error-prone, and should be limited to validating single scores when needed.

	А	В	С	D	E	F	G	Н	1	J	K	L	М	N	0	Р	Q	R
4																		
5																		
6											nd the final so	core of each	assessment	question to	be entered in	n the		
7				Role	Weight	S	core		subsequent	sheets.								
B			Leadership	)	3		0	<b>_</b>	Depending	on the energi	fic roles appli	icable to a c	ortain quaatii	on, aive the c	and of another	rolo and		
9			Process C	Wner	3		0	ſ			ulated score							
0			HR Repres	sentative	2		0		then enter t	ne inar caret			concopona	ing question.	o in the cont	soponang		
1			×	rocess Owner	2	Auto-	Calculate					X						
12			Line Mana		2								ion, simply	score it zero	and it will b	e excluded		
13			Portfolio M		2				es will overwrit	e any manual	ly entered valu	ues. Do						
14			Program N		2		🍯 you war	t to proceed?										
15			Project Ma	¥	2								, use the av	erage of the	ir individual s	cores to		
16			Team Men	nbers	1					-	_	1						
17										نعم		И	erage of all	roles, it's we	ighted calcu	lation based		
18			Final Sco	re				-	UII LIE WEIY	IIL UI CAUITIU	IC.		J					
19																		
20									For Yes/No	questions, p	pay attention	to giving 0 o	r 3 scores or	nly.				
21																		
22																		
23				, use the below b														
24				orkbooks corresp														
25				his functionality t ions 'not included					overwrite any	/ manually e	ntered values	in this cons	solidated wor	кроок. If you	made			
26			some quest	ions not included	uns will be	preserved al	iu wiii not be	calculated.										
27																		
28								ŀ	Auto Calcula	te								
29							_											
30	Cove	score (		PiS 🖌 PiM 🖌 PiC 🖌		/ PaM / Pa		s / pfm / p		Es Results	OEs Results	AR Pi Re	esults 🖌 Pi F	Results AR	Pa Results	- 4		

By clicking the 'Auto Calculate' button, you will be prompted for confirmation to proceed because auto-calculated scores will overwrite any manually entered scores. If you are ready to proceed press 'yes'.

🛚 🗘 🕨 🚺 🕐 Cover 🖉 OEs 🖉 PIS 🖉 PIM 🖉 PII 🖉 PQS 🖉 PQM 🖉 PQI 🖉 PIS 🖉 PFM 🖉 PFI 🦯 OEs Results 🧹 OEs Results AR		
	Opening Process Owner.xls. Press ESC to cancel.	■□□ 100%

Auto-calculation will rotate over all assessment tabs, row by row, and checks the roles applicable to each question, to open the role-based workbook corresponding to that role. You need to keep all of the role-based workbooks in the same directory of the main workbook for the automatic calculation to be able to open files and read them for score consolidation.

		OPM3 Assessment Tool
		0 0
		Auto-Calculate
		Finished worksheet: OEs. Do you want to continue with other worksheets?
	Usage of this tool is allowe	لا نعم
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- Macros mus		
- Macros mus	b related to aspects you want to a	224226
<ul> <li>Select the ta</li> </ul>	t the final score corresponding to	
- Simply selec		
- Simply selec - If a certain B	P/Capability/Outcome is not appli	icable to the specific organization in hand, select 'No' under the "Included?" column
- Simply selec - If a certain B - After you finis	P/Capability/Outcome is not appli sh all questions, view results in th	licable to the specific organization in hand, select 'No' under the "Included?" column ne corresponding results tab
- Simply selec - If a certain B - After you finis	P/Capability/Outcome is not appli sh all questions, view results in th	icable to the specific organization in hand, select 'No' under the "Included?" column

Auto-calculation will notify you after finishing calculation of every assessment sheet, and asks for your confirmation to proceed with the other sheets, this is for the purpose of keeping you notified of progress. Simply press 'yes' to continue. The whole process takes few seconds.

		OPM3 Assessment Too	bl de la constant de	
		Microsoft Excel	×	
		Finished auto-calculation of a	all assessment worksheets.	
	Usage of this to	col is allowed only to	موافق	
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Usage Instr - Macros mu	st be enabled			
- Macros mu		ou want to assess		
- Macros mu - Select the f	st be enabled ab related to aspects yo	ou want to assess sponding to each outcome in the list		
- Macros mu - Select the - Simply sele	st be enabled ab related to aspects yo ect the final score corres		on in hand, select 'No' under the "Included?	" column
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After all sheets are scored, you will receive a notification message that calculation has finished. Now you can see the final scores in all assessment tabs of the main workbook, and reports generated under the results tabs.

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Because all workbooks were opened during the auto-calculation process, you can see the list of all workbooks under the 'View' menu of Excel after the process completes.

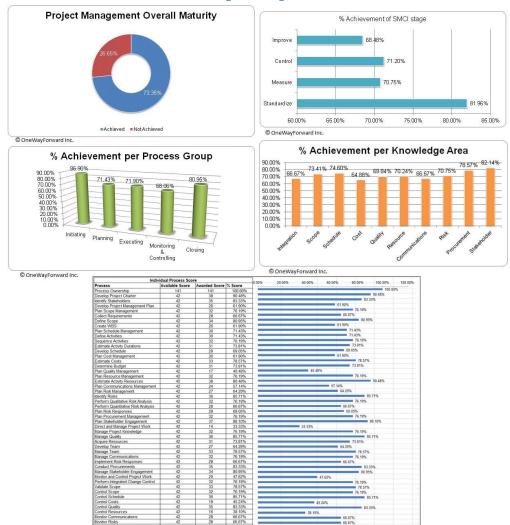
# **Results Reporting**



Assessment results are generated under the results tabs of the main workbook, in both Arabic and English languages. You will see OEs Results, Pj Results (for Project Management), Pg Results (for Program Management), Pf Results (for Portfolio Management), and the Overall results for the OPM total score.

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Report tabs are locked and not editable to prevent any unintentional alterations. You can capture each report by pressing the 'Copy Report' button at the end of each report tab, then you will see a notification message that the report has been copied to the clipboard. Now you can paste the report in any document like MS Word or another Excel file. Pasting in Excel is recommended because it preserves format better, from there you can copy to MS Word or any other documents.



#### **Sample Reports**

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of Quality	42	35	83.33%				3.33%
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Close Project or Phase © OneWayForward Inc.

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# Feature Comparison with ProductSuite

ProductSuite Feature	Excel Tool Feature
Features of management of the assessment project itself (like creating a new project within the tool, project start date and end date, assignments to other assessors, etc.).	You need to make these project management tasks outside the tool as you are used to manage other projects.
Client organization data (name, contacts, income, size, industry, locations, etc.).	You may still create such a form outside the tool to be associated with the assessment workbook for each client you work with.
Practices marked as NA (Not Applicable) are reported as a percentage of the final report, along with the achieved and not achieved percentages.	Practices that are not included in the assessment scope are not taken in account in calculations and are not reported in the final assessment reports. Calculations are percentages of practices that are within scope only, so achieved is percentage of what has been included in the assessment, not taking in consideration anything marked as not applicable.
Improvement plan document generated from the tool.	As of the current version of the tool, improvement planning is to be done manually based on your review of the scoring of each best practice. It can simply be filtration of missed practices in assessment sheets, and this actually how it was reported in the ProductSuite as an improvement path including best practices that are not fully achieved.
OPM3 score versus ProducSuite score.	We report both number of achieved practices (OPM3 score) and total points achieved (ProductSuite score) as per the table listing at the end of each report.
Scoping based on Business Results.	Scoping based on business results is not included in the tool due to the fact that it was not popular in demand in actual use among consultants applying OPM3, and there is no clear or direct connection between best practices of the model and intended business results like project predictability or resource optimization or balanced scorecard, so this is not included here. Scoping in the tool is done by scoring sheets that you want to include in scope, and marking not included parts are 'not included' in the assessment scope ('No' under the 'Included' column).

# **Customer Support**

#### **Technical Support:**

We provide continual support to users of our tool for the lifetime of the current version they have purchased. Most support activities will be free of charge, unless it is a requirement of major customization specific to the customer needs.

#### **Future Updates:**

The tool is continually updated to align with the latest versions of the standards on which it is based. Customers who purchase any version of the tool are entitled to considerable discount to upgrade to future release versions of the tool. Updated versions are expected to be at the frequency of 4 -5 years.

#### **Contacts:**

For support needs, please write to: <u>contact@onewayforward.com</u>. Find more details about the tool and purchasing details on our Toolkits page: <u>http://www.onewayforward.com/toolkits.htm</u>.