

4-6 October, Nationals Park, Washington DC



“Project controls are all about collaboration and teamwork”



4-6 October, Nationals Park, Washington DC



How McKinstry Adopted an end-to-end Solution for Project Financials, Resource Management, and Portfolio Management



Presenters



Gilles Almeras
VP Project Controls & Engineering

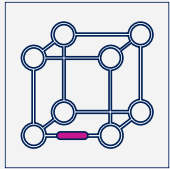


Karen Firmaniuk
Product Management Director

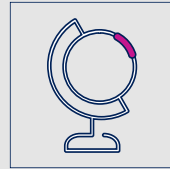


Planisware Introduction

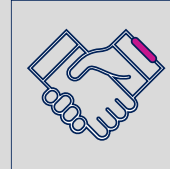
End-to-End Solution for Capital Projects



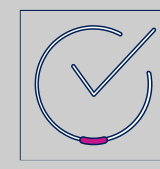
Privately
owned
software
company



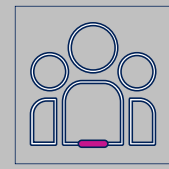
800,000+
Users
Worldwide



Worldwide
Coverage
Partner
Network



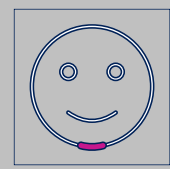
15%
YoY Growth
since 1996



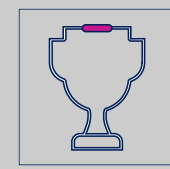
500+
Employees



ISO 27001
& **SOC II**
certified



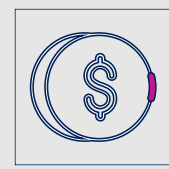
98%
Customer
Retention
Rate



Recognized as a
Market Leader
by analysts



Provides
Industry
Expertise
since 1996



Revenue
2021 - \$130M



Capital Projects & Portfolio Management

End-to-End Solution for Capital Projects

- Capital Requests
- Business Case
- Funding Allocation
- Workflow & Collaboration
- Scenario Modeling
- Strategic Planning
- Investment Scoring
- Weighted Optimization



- Templates & Forms
- Contract Management
- Workflows & Approvals
- Vendor Portal
- Documents & Markups
- Deliverables Tracking
- Bid Management
- Stage-Gate
- Work Package Delegation
- Issue Tracking
- Change Requests
- Resource Management
- Parametric Estimates

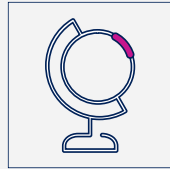
- Estimating
- Cost Management
- Earned Value
- Baselines & Versions
- Risk Management
- Forecasting
- Change Management

Planisware

Project Controls
EXPO
Washington, DC - USA

McKinstry Introduction

DBOM - Full-service Design-Build-Operate-Maintain specialized in high-performance buildings



HQ Seattle, WA
15 States

Founded in 1960

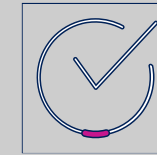


Put People 1st
Build Trusted Partnerships
Be Constantly Curious
Make a positive difference



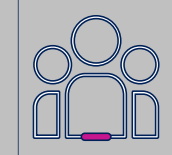
Service Offering

- ActiveOps
- Active Energy Management (AEM)
- Architectural Metals
- Audio Visual
- Commissioning
- EcoDistrict Services
- Electrical & Technologies
- Energy Services
- Engineering & Design
- Facility Condition Assessments
- Fire Protection
- Master Systems Integration
- Mechanical & Plumbing powered
- Service & Maintenance
- Solar & Renewables
- Technology Contractor
- Transition to Sustainable Operations
- Wireless

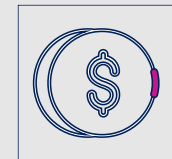


Market Expertise

- Commercial
- Data Centers
- Education
- Government
- Healthcare
- Industrial
- Life Sciences
- Utilities and Infrastructure



900+
Employees



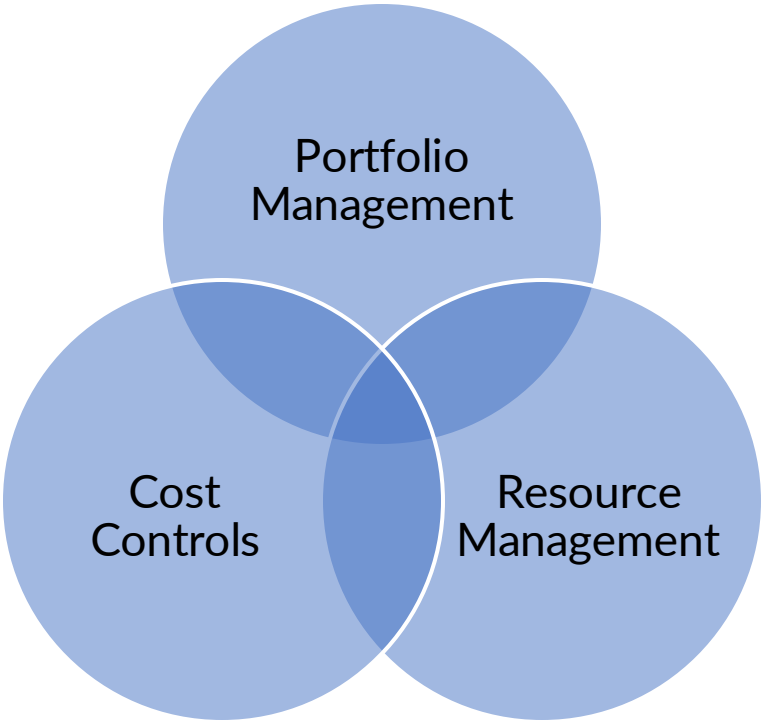
Revenue
2021 - \$720M
2017 - \$550M



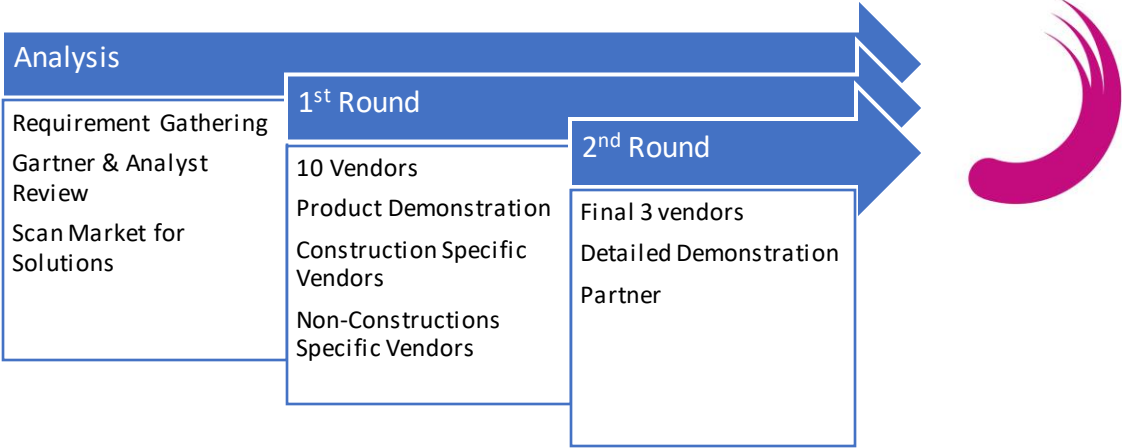
Why Implementing a PPM Solution?

The Start of a Journey

Integrated Solution



Selection Process



Resource Capacity Planning

Visibility & Performance



Pain Points

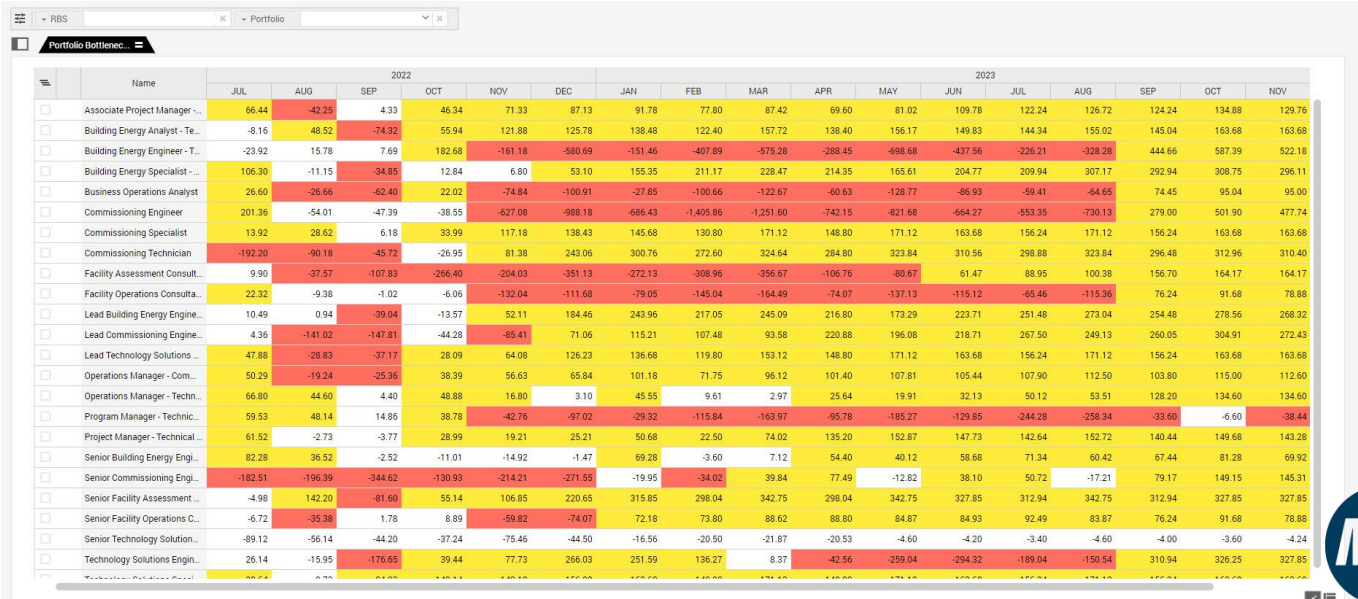
- No visibility on the resource load
- Inability to re-prioritize resource assignment
- Inability to anticipate resource bottleneck

Planisware Solution

- Resource Forecasting (in-flight & in-coming projects)
- Resource Capacity Planning
- Rate Management
- Integration With Workday

Realized Benefits

- Improved efficiency of operational work for project management
- Simplified recurring PM activities
- Pro-active Resource Portfolio Planning



Portfolio Management

The Start of a Journey

Pain Points

- No portfolio reports
- Complex reporting structure
- Data everywhere and nowhere

Planisware Solution

- Project Status Report at the Portfolio Level
- KPI consolidation at the portfolio level
- Profit-and-loss (earned revenue and gross margin tracking)

Realized Benefits

- One source of truth for planning data (versus 5 separate tools) with built-it BI solution
- Improved project management practices and maturity
- Project health visibility (resources, cost, risk)

Portfolio One page... Portfolio One pager - Energy

Project	Proj Stat	Responsibility	Delivery	Proj Con	Planned finish	Estimated Bookings (Opp.)	5% Opportunity Check	Contract Start Date (Opp.)	Gross Margin (%) (Opp.)	Probability (%) (Opp.)	Projected Remaining Hours (hour)	Open Committed Cost (\$)	Projected Remaining Other (\$)	BAC (\$)	Actual Hours (hour)	Estimate at completion (EAC) (\$)	Actual Cost (\$)
204729-007 - AEM-Nexant-St. Francis Univ - Impl.	Opi	0423	Active Energy Management	TyL Zat	12/30/22	250,000.00	540,000.00	11/30/22	20.00	10.00	52.00	0.00 \$	1,207.30 \$	27,000.00	226.50	27,000.00	24,600.00
204835-004 - T-Kelso C7 Gym & Classroom Additions	Opi	0423	New Construction Commissioning	Grz Jur	12/20/22	419,000.00	158,809.60	05/31/21	35.00	100.00	61.00	0.00 \$	1,477.27 \$	7,940.48	3.75	7,940.48	6,000.00
204903-009 - T-Clearwater Schools RTU Replacement	Opi	0423	Existing Building Commissioning	Grz Jur	12/13/23	1,689,458.00	240,324.00	12/01/21	20.00	100.00	94.00	0.00 \$		12,016.20	32.25	12,016.20	4,000.00
205119-001 - X-ComEd-Saint Francis	Opi	0423	Technical Services Sales	Sct Jol	12/17/20	65,000.00	0.00	12/07/20	40.00	100.00		0.00 \$		3,187.16		0.00	
205119-002 - X - St Francis MBCx - Implementation	Opi	0423	Technical Services Sales	TyL Zat	12/30/22	65,000.00	2,356.40	12/07/20	40.00	100.00		0.00 \$		10,271.17	1.50	117.82	1,000.00
205247-003 - FCA-Milwaukee Airport Ph2	Opi	0423	Facility Assessments	TyL Zat	12/30/22	52,500.00	610,952.00	10/18/21	40.00	100.00	8.00	0.00 \$	2,013.42 \$	30,539.60	288.00	30,547.60	29,400.00
205346-004 - Crystal City Elementary School Cx	Opi	0423	New Construction Commissioning	Grz Jur	12/30/22	1,393,486.00	58,050.00	06/14/22	21.00	100.00	21.50	0.00 \$	714.39 \$	2,902.50	1.50	2,902.50	2,000.00
205349-002 - DO NOT USE	Per	0423	New Construction Commissioning	Grz Jur	12/23/22	1,393,486.00	48,167.20	06/14/22	21.00	100.00	18.00	0.00 \$	650.00 \$	2,902.50		2,408.36	2,000.00
205433-005 - T-Mountain/View-BirchTree	Opi	0423	Existing Building Commissioning	Grz Jur	11/02/22	2,691,975.00	822,524.08	06/13/22	20.00	100.00	148.00	0.00 \$	11,330.93 \$	41,126.20	147.50	41,126.20	16,300.00
205433-006 - M-Mt View Schools (MO) - M&V	Opi	0423	Measurement and Verification	Adi Hai	04/06/23	2,691,975.00	109,985.85	06/13/22	20.00	100.00	52.86	0.00 \$		6,923.00	3.00	5,499.29	2,000.00
205464-003 - T-Marshall SD Cx	Opi	0423	Existing Building Commissioning	Grz Jur	11/11/22	528,044.00	161,515.80	08/16/21	16.91	100.00	18.00	0.00 \$	48.10 \$	8,075.79	59.50	8,075.79	6,200.00
205534-005 - T-Charleston SD EL-HS HVAC	Opi	0423	New Construction Commissioning	Grz Jur	10/28/22	2,870,000.00	529,221.00	06/06/22	20.30	100.00	138.00	0.00 \$	10,208.37 \$	26,461.05	29.00	26,461.05	2,500.00
205534-006 - M-Charleston Schools (MO) - M&V	Opi	0423	Measurement and Verification	Adi Hai	06/28/22	2,870,000.00	4,824.40	06/06/22	20.30	100.00		0.00 \$	5,296.51	3.00	241.22	2,000.00	
205535-004 - M-Prairie Home Schools (MO) - M&V	Opi	0423	Measurement and Verification	Adi Hai	06/28/22	84,262.00	4,824.40	02/01/22	22.00	100.00		0.00 \$	3,566.01	3.00	241.22	2,000.00	
205552-002 - Sodexo - University Hospitals FCA	Opi	0423	Facility Assessments	TyL Zat	12/30/22	1,509,971.00	1,288,617.40	12/06/21	42.00	100.00	40.00	0.00 \$	2,965.30 \$	64,430.87	587.00	64,430.87	58,500.00



Cost Forecasting & Cost Controls

Performance Management

Pain Points

- Inability to compare real-time budget to actual
- Time consuming to forecast and reforecast based on actuals
- Poor user experience
- Disconnected tools

Solution

- Integration With Viewpoint
- Cost Forecasting at the phase code & cost type level
- Budget Management
- Project Controls with Actuals
- Change Orders
- Risk Management

Benefits

- Access to augmented and standardized project financials real-time: faster assessment of financial project health (P&L, integrations)
- Improved efficiency of operational work for project management: faster project creation & approval, standardized monthly budgeting process

☰	Cost account	Description	Cost Type	Task or WBS element	Res	Resource rate	Projected Final Cost (BAC) (\$)	JTD Cost (\$)	JTD Hours (h)	Prior Months EAC (\$)	Projected Remaining Cost (ETC) (\$)	Projected Remaining Labor (h)	EAC (\$)	Projected Final Labor (h)	Current Mth Actual (\$)	Estimated Over/(Under)	Current Mth Actual (h)				
																		AUG (F) Labor (hour)	AUG (F) Cost (\$)	SEP (F) Labor (hour)	SEP (F) Cost (\$)
☐	All items (Sum)					3,598.00	938,024.00	29,083.97	330.50	936,468.99	933,628.62	9,299.00	952,073.00	9,563.00	10,638.63	-14,049.27	123.00	81.50	7,148.41	115.00	10,713.80
☐	0100-0000- - GENERAL REQUIREMENTS* (Sum)					110.42	220.84	220.84	4.00	220.84			220.84					4.00	220.84		
☐	> L (Sum)					110.42	220.84	220.84	4.00	220.84			220.84					4.00	220.84		
☐	0131-0000-000001-000 Project Booking, Planning, Projection...					71.82					143.64	2.00	143.64	2.00		-143.64				2.00	143.64
☐	> L (Sum)					71.82					143.64	2.00	143.64	2.00		-143.64				2.00	143.64
☐	0131-0000-00... Project Booking, Pl...	L	DEN - EP...	A...		71.82					143.64	2.00	143.64	2.00		-143.64				2.00	143.64
☐	0131-1030- - Operations Manager - Niffy/Alison (Sum)					654.60	43,667.47	2,836.60	26.00	43,667.47	42,848.10	356.00	45,248.30	372.00	436.40	-1,580.82	4.00	12.00	1,309.20	8.00	872.80
☐	> L (Sum)					654.60	43,667.47	2,836.60	26.00	43,667.47	42,848.10	356.00	45,248.30	372.00	436.40	-1,580.82	4.00	12.00	1,309.20	8.00	872.80
☐	0131-1030- - Operations Manage...	L	DEN - EP...	A...		109.10	14,165.61			14,165.61	14,790.16	122.00	14,790.16	126.00		-624.56				2.00	218.20
☐	0131-1030- - Operations Manage...	L	DEN - EP...	N...		109.10	27,101.66			27,101.66	28,057.93	234.00	28,057.93	246.00		-956.27				6.00	654.60
☐	0131-1030- - Operations Manage...	L	202855-0...	N...		109.10												8.00			
☐	0131-1030- - Operations Manage...	L	202855-0...	A...		109.10												4.00			
☐	0131-1030- - Operations Manage...	L	202855-0...	N...		109.10	1,745.60	2,182.00	20.00	1,745.60			1,745.60		436.40		4.00		872.80		
☐	0131-1030- - Operations Manage...	L	202855-0...	A...		109.10	654.60	654.60	6.00	654.60			654.60						436.40		
☐	0131-1040- - Administration (Brand & Business Services) - Am...					207.18	7,765.90	414.36	6.00	7,765.90	7,334.62	102.00	7,610.86	106.00	138.12	155.04	2.00	2.00	138.12	2.00	138.12
☐	> L (Sum)					207.18	7,765.90	414.36	6.00	7,765.90	7,334.62	102.00	7,610.86	106.00	138.12	155.04	2.00	2.00	138.12	2.00	138.12
☐	0131-1040- - Administration (Bra...	L	DEN - EP...	A...		69.06	7,489.66			7,489.66	7,334.62	102.00	7,334.62	106.00		155.04				2.00	138.12



Washington, DC - USA



THANK YOU

