

## APMG EVALUATION SERVICE FOR PROJECT MANAGEMENT PRODUCTS

### BRONZE REPORT

Number 16

**Company:**

ChangeDirector UK Ltd.

**Address:**

The Atrium, Curtis Rd., Dorking, Surrey, RH4 1XA

**Contact Details:**

Tel: 01306 646470

Fax: 01306 646471

**Email:** [info@changedirector.com](mailto:info@changedirector.com)

**Product:** ChangeDirector

This report covers the Bronze Stage assessment of ChangeDirector, an application from ChangeDirector UK Ltd. that I conducted on Tuesday, 12 January 2010.

ChangeDirector is a browser-based strategy and change portfolio management application. It runs on Internet Explorer 6 and later as well as other popular web browsers. It can be supplied as a hosted service but is more usually installed on a client's own web server.

The application is largely configurable with the client being able to determine what information may be seen and/or edited by users with varying roles within the organisation and how and where that information is displayed.

In the first instance, the organisation's strategy is captured as a list of objectives which can be entered into the system manually, or imported from Excel or Visio. The way the achievement of each objective is to be measured is also determined.

Details of the organisation's programmes of projects (and candidate projects) are then entered along with details of the contribution each makes to the organisation's objectives. The project's resource requirements and other costs are also entered.

Programmes and projects can be assigned to one or more portfolios and reports can then be viewed that illustrate the comparative contribution each project makes to both the organisation's overall objective set and to each individual objective, comparing the project's cost with the value of its objective contribution.

Using this information, an organisation is assisted in deciding on the most beneficial set of projects to carry forward and which, maybe, to abandon.

If it's decided to proceed with a candidate project, ChangeDirector provides the Business Case template which is then completed to include details of investment costs and anticipated benefits, which are profiled over the duration of the project.

Once the Business Case has been signed off, ChangeDirector next provides the Project Initiation Document template, with some fields already completed using data held in the system. Lists of roles, milestones, deliverables (and their approvers) and a communication plan are created. Quality Assurance (QA) gates are established. In many instances, workflows can be defined and email reminders configured to standardise and govern the processes involved. Rules can be established to govern the passage of deliverables through the QA gates.

Once a project moves into the delivery stage, date information can be updated - either by importing updated data via Excel or by entering it directly. ChangeDirector doesn't claim to replace detailed planning and scheduling software and this may also need to be used for the management of projects where a higher granularity of activity control is required.

Risk and issues logs are contained within the system and workflows can be created to handle their escalation and responses. Change request and lessons learned logs are also available.

The system features a range of reports and dashboards which can be viewed on-screen or output as MS Word, xml or pdf files.

ChangeDirector UK Ltd. has indicated that, in their opinion, the design and use of this product falls within the field of guidance offered by the OGC's MSP® and Best Practice documentation covering portfolio, programme, project, strategic, benefits and risk management and that their product complies with this guidance in all respects. I concur with their opinion.

They also state that their tool is partially PRINCE2® compliant and I agree that this appears to be the case.

I consider that this assessment should now proceed to the Silver Stage and I have accordingly agreed a Silver Stage assessment plan with Change Director UK Ltd., which is attached to this report.

S. Cotterell  
18<sup>th</sup> January 2010

PRINCE2® is a Registered Trade Mark of the Office of Government Commerce in the United Kingdom and other countries

MSP® is a Registered Trade Mark of the Office of Government Commerce in the United Kingdom and other countries