Criteria for Levels of Expertise

	1	2	3	4
WEM®				
JPAC®	Pilot projects in progress	Using company-wide at 100 level	50% of company at 200 level DQCL process adhered to	25% of company at 300 level
SIS®	Pilot projects in progress	Using company-wide at 100 level	50% of company at 200 level DQCL process adhered to	25% of company at 300 level
Schedule feedback	Some jobs using WBS to setup project schedule	Some jobs setup to use schedule for project tracking & management	Company-wide understanding of project schedule & feedback loop as shown in WEM® diagram	Project scheduling is required component of company-wide PoPM training and usage
WBS	50% of company using WBS at job level with 50%+ adherance to principles	All jobs over certain criteria (3 days duration) using WBS; WBS principles are followed 80%+	50% of company using WBS for managing the work and risk (not just JPAC®)	Project WBS in place and job WBS is used as source of knowledge and feed to/from process design
Externalizing Work® through Prefabrication	Prefab requested on 25% of jobs	Prefab requested on 50% of jobs Composite rate reduction of 5%	Prefab done on all jobs and treated as "extension of the jobsite" Prefab as % of hours worked > 10%	Prefab measurably shows improvement in productivity both in the shop and on the jobsite 3 Types of Prefab established
Externalizing Work® through VMI	VMI requested on 25% of jobs	VMI requested on 50% of jobs Vendors supporting prefab VMI & logistics	VMI used on all jobs and vendors take over company-wide role of inventory management	Vendors used to externalize logistics and supply chain work and transactions
EAE®	Initial comparisons & analysis of hours in 3 databases on select jobs	Regular analysis of job performance and variation using 3 databases company-wide	Usage of criteria for scenario-building and decision-making based on EAE®	EAE® used company-wide as input to bidding process and overall lessons learned/risk reduction
Finance	JPAC® green line paid attention to by 50% of project teams	JPAC® used by 25% of PM's as input to WIP process for % complete and cost projections	JPAC®, SIS®, and Externalizing Work® review and feedback used as input to overall project financial management (audits, cash flow projections, quantifying cost of impacts to the work)	Company-wide financials improve (gross profit, operating profit, and cash flow) due to utilization of Agile tools & processes

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Agile Procurement				
Process of Procurement	6 steps of Procurement have some elements of process or procedure used on projects	More than 50% of jobs order 3 days in advance, and have no more than 2 deilveries per week	All 6 steps of Procurement are explicitly part of projects of certain criteria (size/duration)	Procurement is integrated into project schedule including long lead items and onsite handling/logistics plans; no more than 3 days onsite; returns happen every 25% complete
Vendor Partnership	Vendor selection process completed	Vendor partnership Statement of Work drafted and translated to required collective processes	Vendor partnership shows measured improvements for both partners	Vendor partnership has helped all partners strategically grow their businesses due to working together
Pilot Projects	2 pilot projects underweight utilizing Process of Procurement and/or Vendor Partnership	Pilot project results have translated to formalized process designs		
Design Teams / SBPI®				
Data gathering & mapping	Teams are in place to utilize SBPI®	Team members correctly utilize process map principles	Team members using correct principles of data collection, analysis, and presentation to translate to process improvement	
PDSA	Teams have followed along with at least 3 PDSA's	Teams have conducted at least 1 PDSA correctly on their own	Team members use PDSA consistently as a means of learning and process improvement	
Pilots	Teams have followed along with at least 3 pilot processes	Teams have conducted at least 1 pilot correclty on their own	Team members use pilot process as a standard approach to follow PDSA	
Process Design	Teams have been trained on system design principles	Teams use system design principles for designing at least one Process (PoPM, PoP, etc.)	Teams have used SBPI® for designing company-wide processes for project delivery	Company measures financial improvement based on designed process utilization

Criteria for Levels of Expertise

	1	2	3	4
Sustainability	Teams have taken 1 designed process into maintenance mode with project plan and tracking	Issue resolution process established company-wide All designed processes include a design for maintenance	Issue resolution and PFML process established and utilized	QC's operate functionally for continuous improvement

Item #	Category	Description	Rank	Score
1	Manpwoer	Get guys to and from the job per request from the field		
2		Make sure the job gets the best electricians available in the company		
3		Manage the work (planning and tracking who does what, when, where)		
4		Manage the labor cost (productivity and composite rate management)		
5		Manage a manpower loading curve (estimate, actual, projection)		
6		Support the field with personnel management (finding, evaluating, training, issues, feedback, following company policy, etc.)		
7		Visit jobsites to evaluate risk and observed % complete		
		Money		
1	Money	Review and approve invoices and / or field time cards		
2		Submit bills on monthly basis		
3		Update WIP report / project profit projection analysis and update		
4		Contract management, including change order tracking and negotiations		
5		Follow up to bill ahead based on effort expended		
6		Develop money strategy and plan for the job (SOV, cash flow plan)		
7		Work to be cash positive by 20% complete		
		Material		
1	Material	Get the best prices on material from the vendors (3 bids & a buy)		
2		Buy out material packages and manage the releases		
3		Mediate between field and the vendors to make sure the field gets what they need		
4		Monitor material spend and burn rate		
5		Work with vendors to utilize services such as VMI, blanket PO's, etc.		
6		Develop a material plan for the job including deliveries, movement onsite, and returns		
7		Develop a procurement and logistics strategy to reduce labor cost		