OYO AI

USE CASE

USE CASE · IT PROJECT MANAGEMENT

Delivery efficiency, measured and explained

How a mid-size IT consulting company evaluates the health of a seven-project portfolio on OYO AI: data collected continuously from the management tools, more than twenty efficiency charts with a drill to the root cause, a dashboard of actionable recommendations, continuous monitoring that catches small issues early, and report schedules that keep every user on what matters most.

INDUSTRY

IT consulting · software delivery · portfolio of 7+ projects

SCOPE

17 use cases · 6 modules · 20+ efficiency charts

PUBLISHED

18 September 2026

oyoai.com/use-cases/it-project-management

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1 How to read this document

This is not a manual. It is the list of things a delivery organisation actually does with the solution, each one written as a use case: who starts it, what the system does by itself, which rule it enforces, and what it leaves behind.

The template

Line	What it answers
Primary actor	The role that starts it. Roles are system roles, not headcount: one person may hold several.
Goal	What that person wants to be true when they are done.
Trigger	The event that makes them open the screen.
Precondition	What must already exist, or the screen will refuse them.
Screen	The page it happens on, named as it appears in the menu.

Then: **Main flow** (numbered), a **flow diagram**, **Rules it enforces**, and the notes and exceptions that belong to it.

Two conventions

- **The tools are named by category.** The deployment connects to issue trackers, boards and time-tracking tools such as Jira, Azure DevOps and YouTrack. Where this document says "the management tool" it means whichever of those a project runs on.
- **Deployment figures are marked.** Two numbers come from the customer's own evaluation and are labelled "from the deployment". Everything else describes how the solution behaves.

In the flow diagrams: ● A person acts ● The system acts by itself ● A rule that can refuse

> ONE THING TO KNOW BEFORE YOU START
>
> Nothing in this solution is typed in by a project manager. Every chart, score and recommendation is computed from data the system collects from the management tools on its own schedule. A number on a dashboard can always be opened to the tickets, sprints and time entries that produced it.

2 The business in one page

A mid-size IT consulting company runs a portfolio of more than seven client projects at once, on more than one management tool, with the business side constantly unhappy about delivery metrics nobody could explain. The solution collects the data continuously, measures efficiency on more than twenty charts, explains the root causes, recommends the next action, watches for the small issues, and reports to each user on what matters most to them.

The problem it replaced

Status reports were assembled by hand from several tools, arrived late, and disagreed with each other. When a metric looked bad, the conversation was about whose number was right rather than what to do. Minor problems surfaced only when they had already become delivery problems.

The five things the solution does

Step	What happens	Who acts
Collect	Data is pulled from every connected management tool continuously: tickets, sprints, boards, time entries, budgets, milestones.	The system
Measure	More than twenty efficiency charts are built per project and rolled up to a portfolio health board.	The system
Dive	Every chart opens to the sprint, the ticket, the person or the day that moved it, until the root cause is on screen.	The people
Recommend	A dashboard of actionable recommendations, each tied to the evidence and to an owner, refreshed as the data changes.	The system, then the people
Monitor and report	Thresholds watch every metric and raise an alert early; report schedules send each user the view they asked for, when they asked for it.	The system

The chain, end to end

Connect the tools ▶ Continuous collection ▶ Efficiency charts ▶ Portfolio health ▶
Drill to the root cause ▶ Recommendation ▶ Owner and due date ▶ Monitoring and alerts ▶
Scheduled reports ▶ Next review

FROM THE DEPLOYMENT

On a portfolio of more than seven projects, the system evaluated the health of the whole portfolio and surfaced its optimization opportunities **within fifteen minutes** of the data being connected, with a potential of **up to 45% budget optimization or delivery improvement**. The business side, unhappy with delivery metrics for months, could see the real bottlenecks for the first time.

THE RULE THAT MAKES IT TRUSTWORTHY

Every number can be opened. A score, a chart or a recommendation is never the end of the trail; it is the top of one. Drilling down always reaches the raw records the management tools hold, so nobody argues about whose spreadsheet is right.

3 Roles, and what each of them sees

Seven system roles. They are roles, not headcount. The dividing line is scope: who sees the whole portfolio, who sees one project, and who sees only the view a schedule sends them.

Role	What they do	What they see
Delivery director	Owns the portfolio. Reviews health, accepts or declines recommendations, sets thresholds.	Everything: all projects, all metrics, the recommendations dashboard, budgets.
Project manager	Runs one or more projects. Dives into their charts, owns recommendations assigned to them.	Their projects in full, the portfolio board read-only.
Team lead	Runs a delivery team. Reads flow metrics, blocked time and review wait for their team.	Team-level charts across the projects the team works on.
PMO analyst	Maintains connectors, mappings and metric definitions. Builds report templates.	Configuration, data quality, all charts.
Finance controller	Watches budget burn against plan and the cost side of recommendations.	Budget and rate views, portfolio board.
Client stakeholder	Receives the scheduled client report for their project.	Only the report views scheduled for them.
Administrator	Users, roles and connector credentials.	Configuration. No project data by default.

RECOMMENDATIONS HAVE OWNERS

A recommendation is not a note. It is assigned to a role, carries a due date, and is closed only when the metric it targeted moves or the owner records why it did not.

4 The metric catalogue

More than twenty charts per project, grouped by the question they answer. Every one of them drills down: from the portfolio to the project, from the project to the sprint, from the sprint to the ticket and the person.

Group	Chart	What it answers	Drill path
Flow	Throughput	How much finished work leaves the team per week	Week, ticket type, ticket
Flow	Cycle time	How long a ticket takes from start to done, with the distribution	Percentile, ticket, status history
Flow	Lead time	How long a request waits from creation to done	Ticket, queue stage
Flow	Work in progress	How much is open at once against the team's limit	Day, person, ticket
Flow	Flow efficiency	Share of cycle time spent working rather than waiting	Ticket, waiting status

Group	Chart	What it answers	Drill path
Flow	Blocked time	How long work sits blocked, and on what	Blocker reason, ticket, dependency
Flow	Review wait	How long finished work waits for review or test	Reviewer, ticket
Predictability	Sprint predictability	Committed against delivered, sprint by sprint	Sprint, ticket carried over
Predictability	Velocity trend	Delivered points or tickets per sprint over time	Sprint, team
Predictability	Estimation accuracy	Estimated against actual effort per ticket	Ticket type, estimator
Predictability	Scope change	Work added or removed after commitment	Sprint, requester, ticket
Predictability	Milestone slippage	Days each milestone moved from its first date	Milestone, cause
Quality	Defect density	Defects per delivered unit of work	Component, sprint, ticket
Quality	Escaped defects	Defects found by the client after delivery	Release, component
Quality	Rework ratio	Share of effort spent on reopened or reworked tickets	Ticket, reopen reason
Quality	Backlog health	Unrefined, ageing and orphaned items in the backlog	Age bucket, ticket
Money	Budget burn against plan	Spend to date against the planned curve	Month, role, project
Money	Cost performance	Value delivered per unit of cost, with the trend	Month, work package
Money	Schedule performance	Work delivered against work planned to date	Month, milestone
People	Utilisation	Billable and planned hours against capacity	Person, week
People	Workload balance	Open work per person against the team median	Person, ticket
People	Stakeholder response time	How long client decisions and answers take	Stakeholder, request
Risk	Risk exposure	Open risks weighted by likelihood and impact, over time	Risk, owner

WHY SO MANY CHARTS

One number hides the cause. Throughput can fall because work is blocked, because reviews wait, because scope was added mid-sprint, or because a person is overloaded. Each of those is a different chart and a different fix. The portfolio health score is a summary; the charts are the diagnosis.

5 The use-case map

Seventeen use cases across six modules, in the order of the chain: connect, measure, dive, recommend, monitor, report.

	ID	Use case	Primary actor	Screen
A	UC-01	Connect a management tool	PMO analyst	Connectors
A	UC-02	Map projects, teams and budgets	PMO analyst	Portfolio setup
A	UC-03	Keep the data flowing and clean	System · PMO analyst	Data quality
B	UC-04	Read the portfolio health board	Delivery director	Portfolio
B	UC-05	Read one project's efficiency charts	Project manager	Project · Efficiency
B	UC-06	Compare projects, teams and periods	Delivery director	Compare
C	UC-07	Drill from a metric to its root cause	Project manager	Any chart
C	UC-08	Investigate a delivery slip	Project manager · Team lead	Project · Predictability
C	UC-09	Investigate a budget overrun	Finance controller	Project · Money
D	UC-10	Review the recommendations dashboard	Delivery director	Recommendations
D	UC-11	Act on a recommendation and close it	Owner of the recommendation	Recommendations
E	UC-12	Set thresholds and alerts	Delivery director · PMO analyst	Monitoring
E	UC-13	Catch a minor issue before it becomes a problem	System → Project manager	Alerts
E	UC-14	Run the weekly delivery review	Delivery director	Portfolio · Review
F	UC-15	Schedule a custom report	Any user	Report schedules
F	UC-16	Send the client status report	Project manager → Client stakeholder	Report schedules
F	UC-17	Present the executive portfolio review	Delivery director	Portfolio · Executive view

6 A · Connect and collect

ONCE PER TOOL, THEN CONTINUOUSLY

Three use cases that a PMO analyst performs at set-up and the system runs from then on. Everything downstream depends on the collection being continuous and the mappings being right, which is why data quality is a use case and not a footnote.

UC-01

Connect a management tool

Primary actor	PMO analyst
Goal	Bring a project's tickets, sprints, boards, time entries and milestones into the solution without anyone re-keying them.
Trigger	A new project starts, or a project moves to a different tool.
Precondition	A service account on the tool with read access to the projects in scope.
Screen	Connectors

Main flow

1. Open **Connectors** and press **Add connector**. Choose the tool: issue tracker, board, time tracking or repository.
2. Enter the base address and the credentials of the service account. The system tests the connection and lists the projects it can see.
3. Tick the projects in scope and choose the **collection interval**. The default is continuous, with a full reconciliation nightly.
4. Save. The first collection runs immediately; the connector shows **Connected**, the record count and the time of the last successful pull.

RULES IT ENFORCES

- Credentials are stored encrypted and never shown again after saving.
- A connector reads. It never writes back to the management tool.
- A failed pull is retried, then raised as a data-quality alert (UC-03). Charts keep the last good data and say so.

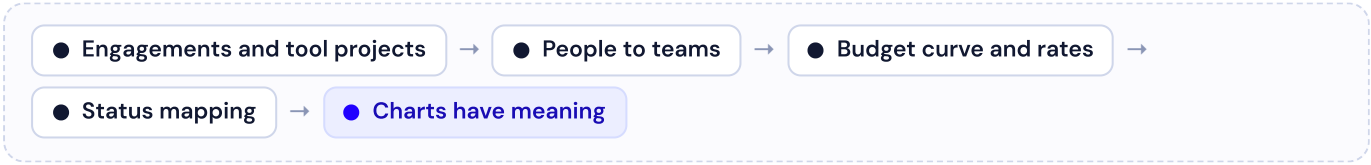
UC-02

Map projects, teams and budgets

Primary actor	PMO analyst, with the Delivery director
Goal	Give every collected record a project, a team and a budget line, so that the charts mean something.
Trigger	A connector is added, or the portfolio is reorganised.
Precondition	At least one connector is Connected (UC-01).
Screen	Portfolio setup

Main flow

1. On **Projects**, create or confirm one portfolio project per client engagement and attach the tool projects that feed it. One engagement may span two tools.
2. On **Teams**, map the people found in the tools to teams and roles. Unmapped people are listed until someone places them.
3. On **Budgets**, enter the planned budget curve and the rates per role, or connect them from the finance system. Enter the planned milestones.
4. On **Metric settings**, confirm the workflow statuses that count as started, waiting, in review and done for each tool. The defaults are the tool's own.



RULES IT ENFORCES

- A record that cannot be mapped is never dropped. It is shown as **Unmapped** and excluded from scores until placed.
- Budgets and rates are visible to the Delivery director, the Finance controller and the PMO analyst only.

UC-03

Keep the data flowing and clean

Primary actor	System, with the PMO analyst
Goal	Every chart is built from complete, current data, and anyone reading it can see how current.
Trigger	Continuous.
Precondition	Connectors and mappings exist.
Screen	Data quality

Main flow

1. The system pulls changes from every connector on its interval and reconciles fully each night.
2. It checks each pull: tickets without estimates, time entries without tickets, sprints without dates, people without teams, statuses that fit no mapping.
3. Findings appear on **Data quality** with a count, the records concerned and the person who can fix them at the source.
4. Every chart carries a freshness stamp: the time of the last successful pull for each tool it uses.

DATA IS FIXED AT THE SOURCE, NEVER HERE

The solution does not edit tickets, estimates or time entries. If an estimate is missing, the finding names the ticket and the person; the fix happens in the management tool and flows back on the next pull. That is what keeps the charts and the tools from disagreeing.

7 B · Measure

THE FIFTEEN MINUTES

These three use cases are what the deployment did first: connect, map, and read the portfolio board. Within fifteen minutes of the data being connected the health of a portfolio of more than seven projects was on one screen, with the optimization opportunities ranked.

UC-04

Read the portfolio health board

Primary actor	Delivery director
Goal	See the state of every project in ten seconds, then click into the exception.
Trigger	Every morning, and before every client conversation.
Precondition	Collection is running (UC-03).
Screen	Portfolio

Column	What it is
Health	A score per project from its flow, predictability, quality, money and people metrics against their thresholds, with the trend over four weeks.
Top driver	The single metric contributing most to the score, named. Clicking it opens that chart.
Open recommendations	How many, and the oldest overdue one.
Budget	Burn against plan, as a percentage and a colour.
Next milestone	The date, and the days it has moved.
Freshness	When the data was last pulled.

Main flow

1. Open **Portfolio**. Projects are sorted with the weakest health at the top.
2. Read the **Top driver** column: it is the answer to "why" before the question is asked.
3. Click a project to open its efficiency charts (UC-05), or a driver to open that chart directly (UC-07).

RULES IT ENFORCES

- The health score is never typed or overridden. It is computed from the charts, and the weights are visible on Metric settings.
- A project with stale data shows its score greyed with the age of the data, never a fresh-looking number on old facts.

UC-05

Read one project's efficiency charts

Primary actor	Project manager
Goal	Know how the project is really running, on all twenty-plus dimensions, without assembling anything.
Trigger	Sprint review, client call, a red cell on the portfolio board.
Precondition	The project is mapped (UC-02).
Screen	Project · Efficiency

Main flow

1. Open the project. The charts are grouped: Flow, Predictability, Quality, Money, People, Risk.
2. Each chart shows the current value, the trend, the threshold and the portfolio median for comparison.
3. Charts that breached a threshold in the period are flagged and moved to the top of their group.
4. Any chart opens to its drill path (UC-07).

AGAINST THE MEDIAN, NOT AGAINST A WISH

Every chart shows the portfolio median next to the project's value. A cycle time of nine days is a fact; nine days against a median of four is a finding.

UC-06

Compare projects, teams and periods

Primary actor	Delivery director · PMO analyst
Goal	Find what the best-running project does differently, and whether last quarter's change worked.
Trigger	Quarterly review; a recommendation being evaluated.
Precondition	At least two projects or two periods with data.
Screen	Compare

Main flow

1. Choose what to compare: projects, teams, or one project across two periods.
2. Choose the metrics. The default is the six that drive the health score.
3. Read the side-by-side charts. Differences beyond the threshold are highlighted.
4. Save the comparison as a view; it can be scheduled as a report (UC-15).

8 C · Deep dive

GETTING TO THE BOTTOM OF IT

A chart tells you that throughput fell. The deep dive tells you it fell because two tickets waited nine days for review by one person who was also on two other projects. That is a decision; the chart alone was an argument.

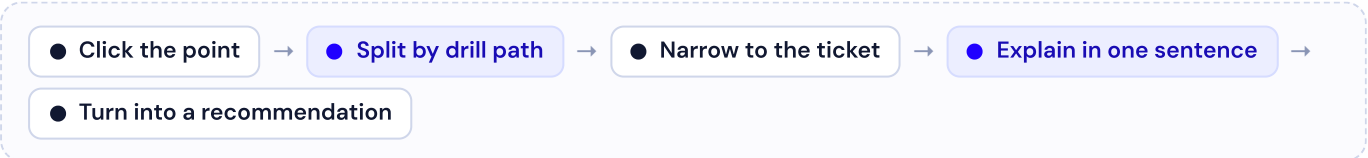
UC-07

Drill from a metric to its root cause

Primary actor	Project manager, or anyone reading a chart
Goal	Reach the tickets, people and days behind a number, and stop when the cause is on screen.
Trigger	A chart looks wrong, or a stakeholder asks why.
Precondition	The chart exists.
Screen	Any chart

Main flow

1. Click the point on the chart. The system splits it by the first dimension of its drill path: for cycle time, the percentile band; for blocked time, the blocker reason.
2. Click again. The split narrows: to the tickets, then to the status history of one ticket, with the person and the timestamp at each step.
3. At any level, press **Explain**. The system names the largest contributor at that level in one sentence, for example “61% of blocked time in this sprint is waiting on client decisions for three tickets”.
4. Press **Recommend** to turn the finding into a recommendation with the evidence attached (UC-10).



RULES IT ENFORCES

- The bottom of every drill is a record in the management tool, opened in that tool with one click. The solution never shows a number it cannot trace.
- Explanations are computed from the split, not written by hand, so two people drilling the same chart read the same sentence.

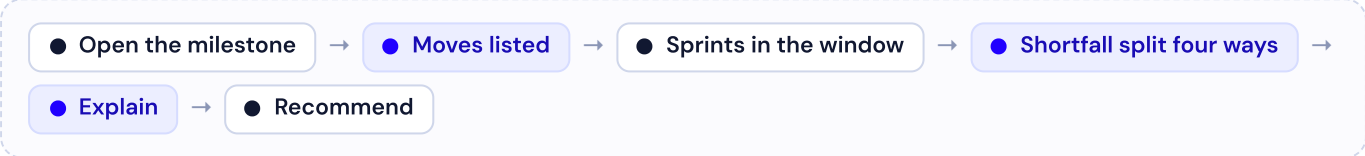
UC-08

Investigate a delivery slip

Primary actor	Project manager · Team lead
Goal	Know why a milestone moved and what to change so the next one does not.
Trigger	Milestone slippage is flagged on the project.
Precondition	Milestones are entered (UC-02).
Screen	Project · Predictability

Main flow

1. Open **Milestone slippage**. The milestone shows its first date, its current date and every move in between.
2. Open the sprints between the two dates. Sprint predictability shows committed against delivered for each.
3. Split the shortfall: scope added after commitment, tickets carried over, tickets blocked, estimation misses. Each is a chart on the same drill path.
4. Press **Explain** for the one-sentence cause, then **Recommend**.



Alternative flows

The slip is scope	Scope change shows who added the work and when. The recommendation targets the intake process, not the team.
The slip is waiting	Blocked time and review wait show the queue. The recommendation targets the reviewer's load or the client's response time.
The slip is estimation	Estimation accuracy shows the ticket types that run over. The recommendation targets refinement for those types.

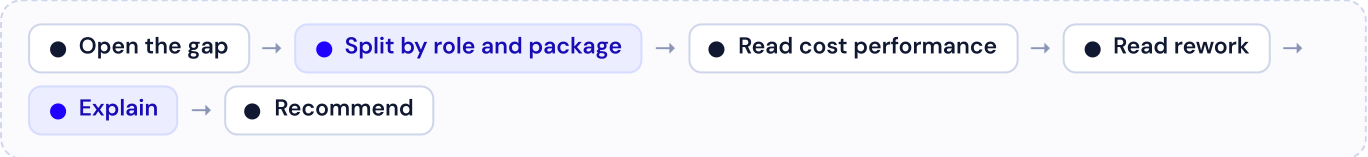
UC-09

Investigate a budget overrun

Primary actor	Finance controller, with the Project manager
Goal	Know where the money went against the plan, by month, role and work package, and what it bought.
Trigger	Budget burn crosses its threshold.
Precondition	Budget curve and rates are entered (UC-02); time entries are collected.
Screen	Project · Money

Main flow

1. Open **Budget burn against plan**. The gap opens by month.
2. Split by role: which rates drove the spend. Split by work package: what the spend delivered.
3. Read **Cost performance** next to it: whether the extra spend delivered extra work, or the same work at a higher cost.
4. Read **Rework ratio**: how much of the spend went to reopened work.
5. Press **Explain**, then **Recommend**.



RULES IT ENFORCES

- Money views are visible to the Delivery director, the Finance controller and the PMO analyst only. A team lead sees hours, never rates.

9 D · Recommend

FROM FINDING TO OWNER

The recommendations dashboard is where the evaluation becomes a plan. Each entry names the metric it targets, the evidence, the action, the owner and the date, and it stays open until the metric moves.

UC-10

Review the recommendations dashboard

Primary actor	Delivery director
Goal	Decide, in one sitting, which improvements to make and who makes them.
Trigger	Weekly, and whenever a new recommendation is raised.
Precondition	Collection is running; at least one threshold is set.
Screen	Recommendations

Recommendations come from two places: the system raises one whenever a metric breaches its threshold with a computable cause, and a person raises one from a drill (UC-07). Both look the same on the dashboard.

Column	What it is
Recommendation	One sentence, in the form “do X to move Y”. For example: “Add a second reviewer for the payments component to cut review wait from 6 days to the 2-day median.”
Targets	The metric and project it should move, with the current value and the target.
Evidence	The drill that produced it, one click away.
Potential	The estimated effect on budget or delivery, computed from the metric’s share of the gap.
Owner and due date	Who, and by when.
Status	Proposed · Accepted · In progress · Moved · Did not move · Declined.

Main flow

1. Open **Recommendations**. Entries are ranked by potential, largest first.
2. Open the evidence for the ones at the top. Accept, decline with a reason, or edit the action.
3. Assign an owner and a due date. The owner is notified with the evidence attached.
4. Accepted recommendations appear on the project board and in the owner’s scheduled report.

FROM THE DEPLOYMENT

On the first review, the recommendations dashboard ranked the portfolio's opportunities at a potential of up to 45% budget optimization or delivery improvement. The number is the sum of the potentials of the accepted recommendations, computed by the system, not a target typed in.

RULES IT ENFORCES

- A recommendation is never deleted. Declined ones stay on the dashboard with their reason, so the same finding is not raised and declined twice.
- Potential is computed and cannot be edited by hand.

UC-11

Act on a recommendation and close it

Primary actor	The owner of the recommendation
Goal	Make the change, and prove with the metric that it worked, or record honestly that it did not.
Trigger	A recommendation is assigned.
Precondition	The recommendation is Accepted.
Screen	Recommendations

Main flow

1. Open the recommendation from the notification or the report. Read the evidence.
2. Make the change in the real world: the process, the staffing, the intake rule. Set status to **In progress** and note what was done.
3. The system keeps watching the target metric. When it reaches the target and holds for the confirmation window, the status becomes **Moved** by itself.
4. If the due date passes and the metric has not moved, the status becomes **Did not move** and the owner records why. A new recommendation may be raised from the same evidence.

RULES IT ENFORCES

- Closure is decided by the metric, not by the owner. Nobody marks their own recommendation as successful.

10 E · Monitor

SMALL ISSUES, CAUGHT SMALL

Continuous monitoring is what turns a quarterly post-mortem into a Tuesday-morning fix. Thresholds watch every chart; an alert names the metric, the cause and the owner while the issue is still minor.

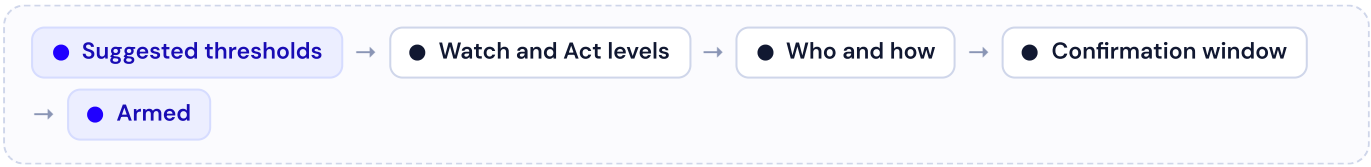
UC-12

Set thresholds and alerts

Primary actor	Delivery director, with the PMO analyst
Goal	Decide what “minor” and “problem” mean for each metric, once, so the system can tell them apart.
Trigger	Set-up; after a quarter of data; when a client’s expectations change.
Precondition	Charts have at least four weeks of data.
Screen	Monitoring

Main flow

1. Open **Monitoring**. Every metric shows its current value, the portfolio median and a suggested threshold derived from the last quarter.
2. Accept the suggestion or set two levels per metric: **Watch** (minor) and **Act** (problem).
3. Choose who is notified at each level and how: in the app, by e-mail, in the scheduled report.
4. Choose the confirmation window: how many consecutive pulls a breach must hold before it alerts, so that noise does not.



RULES IT ENFORCES

- Thresholds can be set per project, but the portfolio default applies until they are. No metric is unwatched.

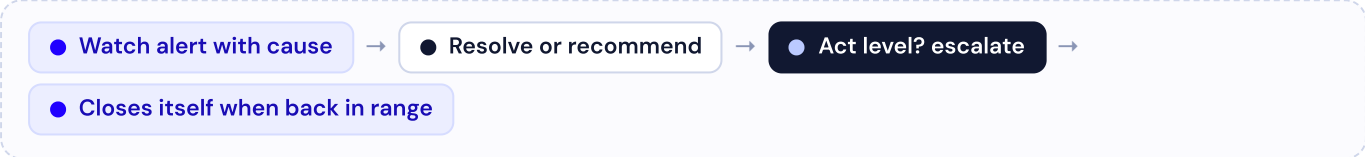
UC-13

Catch a minor issue before it becomes a problem

Primary actor	System → Project manager
Goal	Act on a drift while it is still cheap to act on.
Trigger	A metric crosses its Watch level and holds for the confirmation window.
Precondition	Thresholds are set (UC-12).
Screen	Alerts

Main flow

1. The system raises a **Watch** alert: the metric, the project, the value against the threshold, and the one-sentence explanation from the drill.
2. The project manager opens it, reads the evidence, and either resolves the cause at the source or raises a recommendation.
3. If the metric crosses the Act level, the alert escalates to the Delivery director and appears on the portfolio board's top driver.
4. When the metric returns inside the threshold and holds, the alert closes itself with the duration recorded.



Alternative flows

The same alert keeps returning	The system counts recurrences. On the third in a quarter it raises a recommendation automatically, because the cause is structural.
Data is stale	No alert is raised on stale data. A data-quality finding is raised instead (UC-03).

> **WHY WATCH AND ACT ARE DIFFERENT**
>
> A review wait of three days against a two-day median is a Watch: a word with the reviewer. Seven days is an Act: a staffing decision. The two levels keep the small conversation small.

UC-14

Run the weekly delivery review

Primary actor	Delivery director, with the Project managers
Goal	Spend the meeting on decisions, not on assembling the picture.
Trigger	Weekly.
Precondition	None.
Screen	Portfolio · Review

Main flow

1. Open **Review**. It is the portfolio board filtered to what changed this week: new alerts, recommendations due, milestones moved, budgets crossing a line.
2. Walk the list top to bottom. Each item opens to its evidence.
3. Decisions are recorded as recommendation statuses and owners, in the meeting.
4. The review view is sent to every attendee afterwards as a scheduled report (UC-15).

11 F · Report

EACH USER, THEIR OWN VIEW, ON THEIR OWN SCHEDULE

Report schedules replace the hand-assembled status deck. Any view in the solution can be scheduled to anyone, and the person receiving it decides what matters most to them.

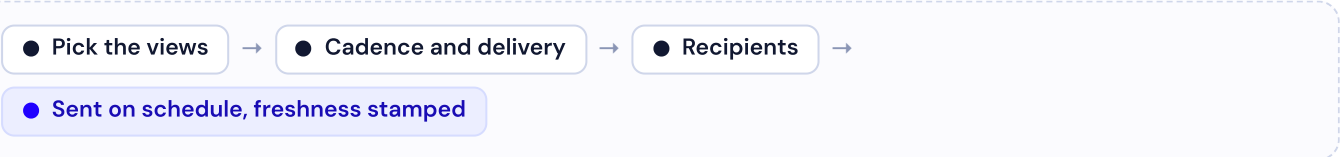
UC-15

Schedule a custom report

Primary actor	Any user
Goal	Receive the charts and lists that matter to me, when I need them, without opening the app.
Trigger	The user decides what they want to keep track of.
Precondition	The user has access to the views they schedule.
Screen	Report schedules

Main flow

1. Open **Report schedules** and press **New schedule**.
2. Pick the views: any chart, board, comparison or list, from the projects the user can see.
3. Pick the cadence and the delivery: daily, weekly, before a recurring meeting; in the app, by e-mail, as a PDF.
4. Pick the recipients. A user can schedule to themselves or, with the right role, to others.
5. Save. The first report is sent at the next scheduled time, with the freshness stamp of the data it used.



RULES IT ENFORCES

- A schedule can only contain views the recipient is allowed to see. Money views never reach a team lead by accident.
- Every sent report is kept, so the picture the client saw on a given date can be reopened.

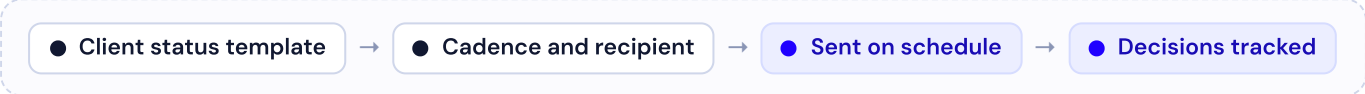
UC-16

Send the client status report

Primary actor	Project manager → Client stakeholder
Goal	Give the client the same truth the team sees, on a fixed rhythm, with no assembling.
Trigger	Weekly or per sprint, as agreed with the client.
Precondition	The client stakeholder exists as a user with the Client role.
Screen	Report schedules

Main flow

1. Create a schedule from the **Client status** template: milestones, sprint predictability, open risks, stakeholder response time, and the recommendations that need a client decision.
2. Set the cadence to the client's meeting. Add the client stakeholder as recipient.
3. The report goes out on schedule. The stakeholder can open any chart in it, within the Client role's scope.
4. Client decisions requested in the report are tracked as stakeholder response time.



THE CLIENT SEES THEIR OWN RESPONSE TIME

When a delivery slips because decisions waited, the chart is in the report the client reads. The conversation changes from blame to a number both sides can move.

UC-17

Present the executive portfolio review

Primary actor	Delivery director
Goal	Show the business the state of delivery in numbers it trusts, and the improvements in flight.
Trigger	Monthly, and at quarter end.
Precondition	None.
Screen	Portfolio · Executive view

Main flow

1. Open **Executive view**: portfolio health over the period, budget against plan, milestones delivered against planned, and the recommendations moved, in progress and did-not-move.
2. Each figure opens to its evidence, so a question in the room is answered in the room.
3. Schedule the view to the executives after the meeting (UC-15).

Period summary → Answer in the room → Schedule to executives

FROM THE DEPLOYMENT

The business side had been unhappy with delivery metrics it could not interpret. With the executive view they could see the real bottlenecks and the improvement opportunities, and follow each recommendation from evidence to result.

12 End to end: the first fifteen minutes

What the deployment did on day one, with a portfolio of more than seven projects on more than one management tool.

Minute	What happened	Use case
0 to 3	Connectors added for the issue tracker and the time-tracking tool; first collection ran.	UC-01
3 to 7	Tool projects attached to engagements; people mapped to teams; budget curves and milestones entered.	UC-02
7 to 8	Data-quality findings listed: tickets without estimates on two projects, three unmapped people.	UC-03
8 to 10	Portfolio board read. Two projects at the top with review wait and scope change as top drivers.	UC-04
10 to 13	Drill on the weakest project: 61% of blocked time waiting on client decisions for three tickets; review wait of six days against a two-day median.	UC-07
13 to 15	Recommendations dashboard read. Opportunities ranked; potential summed to up to 45% budget optimization or delivery improvement across the portfolio.	UC-10

Fifteen minutes is the time from connection to a ranked list of opportunities with evidence. What followed was the ordinary work of the use cases in D, E and F: owners assigned, thresholds set, reports scheduled, and the metrics watched until they moved.

> **WHAT THE NUMBER IS, AND WHAT IT IS NOT**
>
> Up to 45% is the sum of the potentials the system computed for the accepted recommendations. It is a ceiling identified on day one, not a result claimed on day one. Each recommendation closes only when its metric moves.

13 The rules the system enforces

Ten rules that are refusals or behaviours, not reminders.

Rule	What happens	Where
A number that cannot be traced	Is not shown. Every chart drills to a record in the management tool.	Every chart
Typing a score, a potential or a status	Refused. Scores and potentials are computed; recommendation status moves with the metric.	Portfolio, Recommendations

Rule	What happens	Where
Editing a ticket, estimate or time entry in the solution	Not possible. Data is fixed at the source and flows back on the next pull.	Connectors
A chart on stale data	Shown greyed with the age of the data. No alert is raised on it.	Every chart
Marking your own recommendation as successful	Refused. Closure is decided by the metric holding its target.	Recommendations
Deleting a recommendation	Refused. Declined ones stay with their reason.	Recommendations
An unwatched metric	Does not exist. The portfolio default threshold applies until a project sets its own.	Monitoring
A single-pull breach	Does not alert. Breaches must hold for the confirmation window.	Monitoring
A report containing views the recipient may not see	Refused at scheduling time.	Report schedules
Money views for a team lead	Hidden. Hours are visible, rates and budgets are not.	Roles

What the system fills in by itself, and therefore nobody types

Health score
Computed from the charts against thresholds, weights visible.

Top driver
The metric contributing most to the score, named.

Explanation
One computed sentence per drill level.

Potential
The estimated effect of a recommendation, from the metric's share of the gap.

Recommendation status
Moved or Did not move, decided by the metric.

Freshness
The time of the last successful pull, on every chart and report.

14 Appendix A · Metric definitions

The formulas behind the charts that drive the health score. All are computed from the management tools' own records; the status mapping in UC-02 decides which statuses count.

cycle time = done timestamp − first in-progress timestamp

Per ticket; the chart shows the 50th and 85th percentiles

flow efficiency = time in working statuses ÷ cycle time

Per ticket, averaged per sprint

sprint predictability = delivered at sprint end ÷ committed at sprint start

Tickets added after start count as scope change, not as commitment

rework ratio = effort on reopened tickets ÷ total effort

Per sprint, from time entries

cost performance = value of work delivered ÷ cost of work to date

Value at planned rates, cost at actual rates

schedule performance = work delivered to date ÷ work planned to date

Against the milestone plan

health score = Σ (metric position against threshold × weight)

Weights visible on Metric settings; default equal across the six groups

potential = share of the gap the metric explains × the gap's cost or delay

Per recommendation; summed on the dashboard

15 Appendix B · Connectors and vocabulary

Category	Examples	What is collected
Issue tracker and boards	Jira, Azure DevOps, YouTrack	Tickets, statuses and their history, sprints, estimates, components, assignees, blockers
Time tracking	The tracker's own worklogs, or a separate time tool	Hours per ticket, per person, per day
Repositories and pipelines	Git hosting and CI	Review wait, deployment frequency, change failure
Finance	The finance system or a budget sheet	Budget curves, rates, invoiced amounts

Recommendation status

Proposed · Accepted · In progress · Moved · Did not move · Declined

Alert level

Watch (minor) · Act (problem)

Connector status

Connected · Retrying · Failed

Data state

Fresh · Stale (age shown) · Unmapped

Report delivery

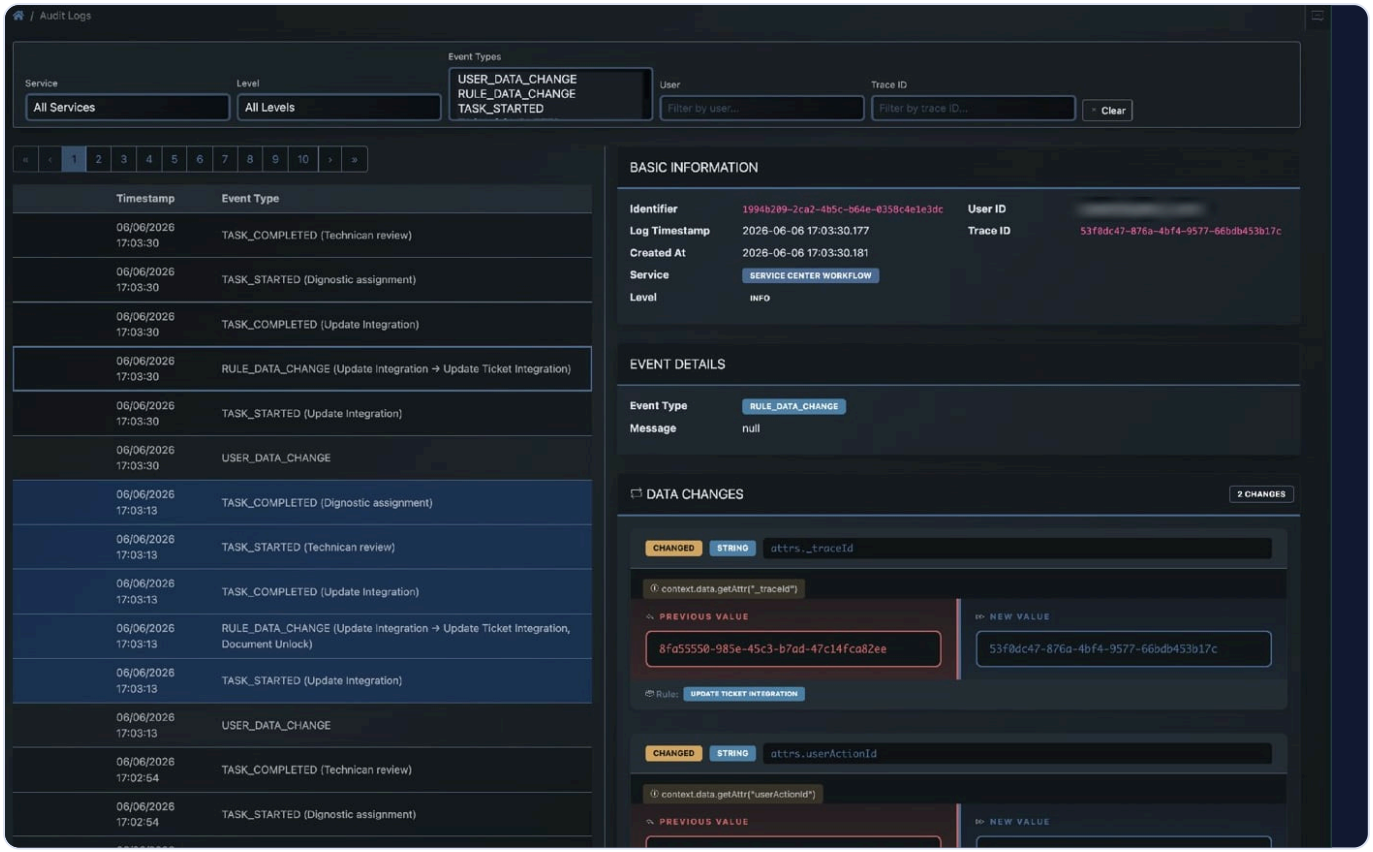
In app · E-mail · PDF

Cadence

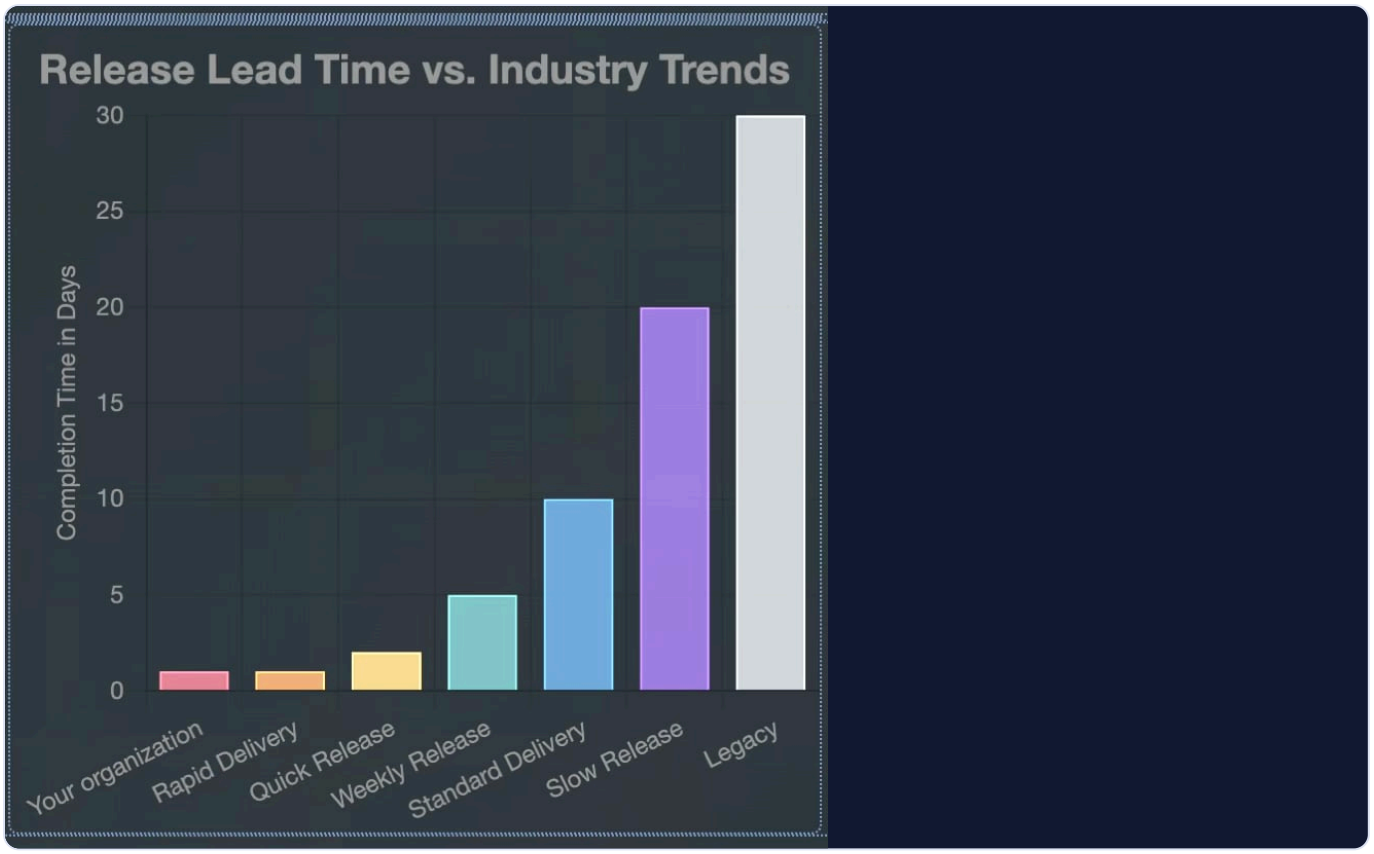
Daily · Weekly · Per sprint · Before a meeting · Monthly

16 Screens from the system

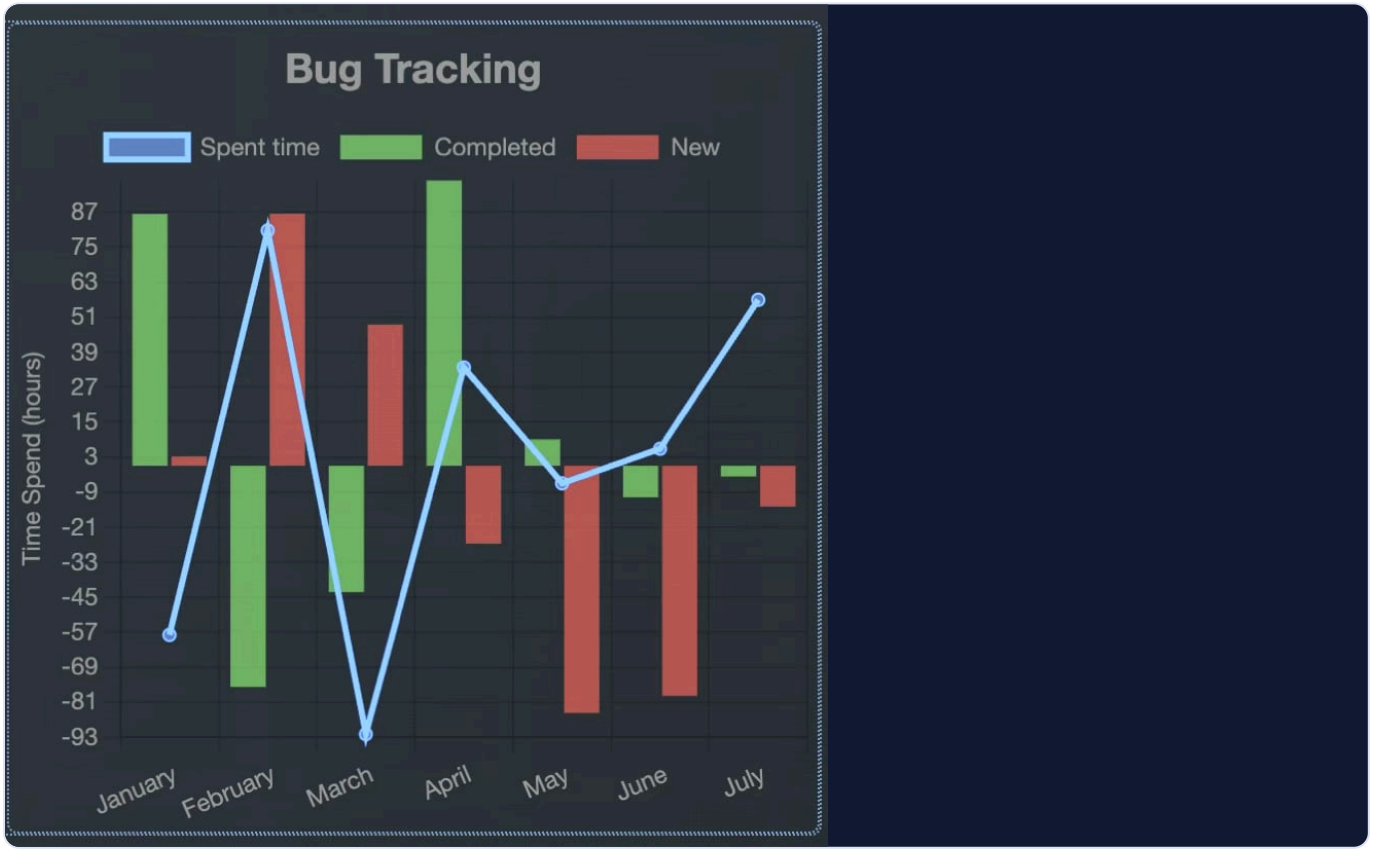
Product screens, not the customer's portfolio. The charts were captured in the page editor.



Audit log
Each step and data change with its timestamp, its previous and new value, and the rule that made it.



Release lead time against industry bands
Your organization's completion time set beside delivery bands, from rapid to legacy.



Bug tracking
Spent time, completed and new bug hours by month.

About this document

Compiled in September 2026 from the deployment summary of a mid-size IT consulting company and the OYO AI product description for Business Process Automation and Business and Process Intelligence. The two figures quoted from the deployment, the fifteen-minute portfolio evaluation and the potential of up to 45% budget optimization or delivery improvement, are the customer's own findings and are marked as such wherever they appear. Customer identity, project names and tool instances are left out on purpose.

OYO AI

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OYO AI is the AI business and process intelligence platform: no-code apps, business process automation and real-time process intelligence on one governed data model. The use cases in this document are built on it as configuration, not as customised code. What the system refuses, it refuses for every customer.

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Build internal tools, workflows and portals visually, governed by IT.

Business Process Automation
Automate multi-step processes, approvals and exceptions end to end.

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ERP
A modular ERP keeping finance, operations, inventory and production in sync.

AI Virtual Consultant
Round-the-clock intelligence that watches the business and recommends the next best move.