

Automated Risk Creation in Altus

- ✓ Efficient risk processes
- ✓ Automated risk ratings
- ✓ Mitigation focus

SITUATION

A leading higher education institution faced a common challenge in project management: ensuring comprehensive, consistent and efficient management of project risks. Its Project Managers (PMs) often spent considerable time manually compiling and entering risks, which detracted from their ability to focus on mitigation strategies.

This process was not only time-consuming but also inconsistent, relying heavily on individual PMs' experiences and knowledge. Recognising the need for a more streamlined and standardised approach, this organisation collaborated with Sensei to develop a solution that would automate the creation of project risks based on responses to a risk questionnaire.

The work was undertaken as part of the organisation's project and portfolio management transformation process. Instead of manually handling spreadsheet data, a Power Automate (PA) flow was created to pick up the information, calculate the risk ratings, and produce records directly within the Risk Register. This automation not only reduced administrative overhead for project managers but also ensured consistency and standardisation across the organisation in terms of risk management.

SOLUTION

The project was initially delivered in Project Online and was subsequently able to be replicated in Sensei's preferred PPM solution, Altus, built on the Microsoft Power Platform. The core objective was to streamline the process of identifying and documenting risks, leverage knowledge from historical

data and ensure consistency in risk management across all projects. The solution involved several key components: a risk questionnaire form built in Microsoft Forms, mapping tables managed through a Power App view, an auto-creation workflow using Power Automate, and a risk register within the Altus platform.

The process began with project managers filling out a risk questionnaire form at various stages of their projects, such as at the start, midway point, and near completion. The questionnaire responses were then used to automatically generate relevant risks in the project's risk register. This automation significantly reduced the time and effort required to create risk entries and provided access to data from risk management experience across all projects at the organisation, allowing project managers to benefit from this knowledge and dedicate more time to valuable mitigation activities.

The system calculated which risks were relevant to the project based on the data provided in the form. It then populated the risk register with detailed information, including the risk title, description, status, and initial rating. Some fields were left for the project managers to complete, ensuring that unique and project-specific details were accurately captured.

The enhanced process covered a wide range of standard risks, including budget inflation, infrastructure changes, technical risks, sustainability issues, occupational health and safety (OHS), stakeholder impacts, strategic needs, legal and regulatory risks, market risks, lead times, environmental factors, licensing issues, and heritage/cultural limitations. This comprehensive approach ensured that project managers could anticipate and manage a broad spectrum of potential project challenges.



CHALLENGES

One of the significant complexities addressed in this project was handling duplicate questionnaires. If a questionnaire had already been completed for a project, the system would keep the old risks, set them to closed, and create new risks as active. This ensured that the risk register remained up-to-date without duplicating efforts. Additionally, the system needed to manage mandatory fields, ensuring that all essential information was provided either through automation or by prompting the project manager for details.

The solution was designed to handle a large volume of potential risks—up to 60 per project. This required an elaborate mapping of questions to risks and linking the questionnaires to the correct projects via Project IDs. The Sensei team also ensured that risks were clearly identified as either created from the questionnaire or manually by the project manager, maintaining transparency and traceability in the risk management process.

The solution employed some very advanced Power Automate flows to handle the complexity of the task. An extensive testing process was implemented in close collaboration with the organisation, ensuring that the solution met all requirements and functioned smoothly. Continuous reviews and improvements were made throughout the project to refine the process and address any issues that arose.

While the initial delivery was in Project Online, by collaborating closely with the organisation's project team, Sensei was able to build the risk creation workflows in Altus, using the capabilities of the Microsoft Power Platform.

The Risk Questionnaire process was applied to property-type projects, with three types of questionnaires: Risk Detection at the start, Risk Check midway, and Risk Review near completion. Each questionnaire had specific questions designed to identify relevant risks and gather essential data. The responses determined whether risks would be created, their likelihood, and their consequences. Templates for each risk were stored in the Risk Mapping table, allowing the PMO to set multiple fields such as description and mitigation plan.

WORK PROCESS

The process begins with the PM navigating to their project and selecting the appropriate Risk Questionnaire button. They enter the Project ID and proceed through the form, answering questions before submitting it. Power Automate flows trigger upon form submission, locating

the associated project, mapping responses to risks, closing existing risks, and creating new ones with the appropriate metadata.

Business rules ensure that the PMO maintains the Risk Mapping Table and that any necessary fields are populated correctly. If a response requires further investigation, the likelihood and consequence defaults to the highest values. Risks are created based on matching triggers and responses, with specific rules for occupational health and safety risks.

RESULTS

The automated risk creation solution for this higher education client exemplifies how innovative technology can enhance project risk management. Despite initial challenges, the Sensei team, working closely with the client team, has delivered a robust and reliable system, significantly improving efficiency and accuracy. The solution not only saves project managers time but also ensures a higher degree of consistency and thoroughness in risk management across projects. By automating the risk creation process, the organisation has established standardised libraries for minimum risk assessment standards at project initiation, particularly benefiting the property and investment space, including construction projects.

This successful implementation demonstrates the potential for similar solutions to benefit other higher education institutions, ensuring comprehensive risk management and enabling project managers to focus on critical mitigation activities. The close collaboration between the client and Sensei has resulted in a process that adds immense value, showcasing a commitment to quality, innovation, and client satisfaction.

CONTACT INFORMATION

 1300 SENSEI

 LetsChat@Sensei.Cloud

 www.sensei.cloud