



End-to-End Solution for  
Proposal and Project Cost  
Management

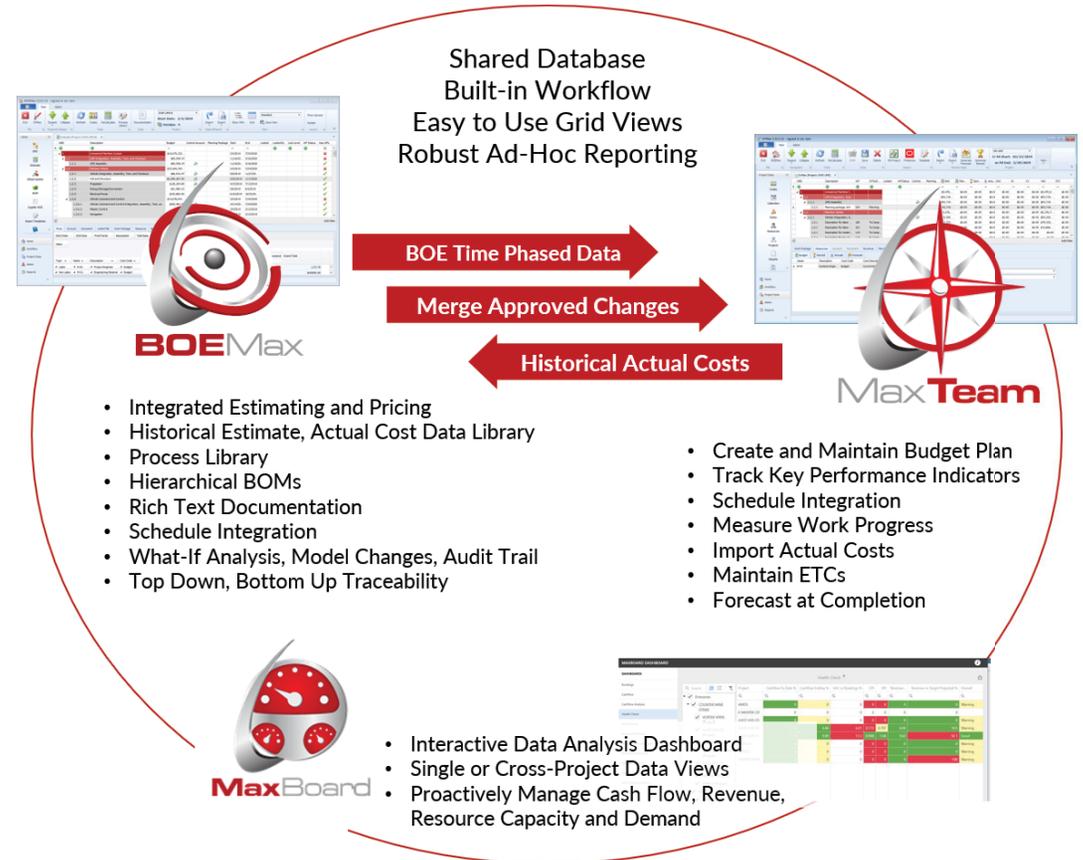
## End-to-End Solution Overview

ProjStream's integrated software tools are designed to help you create and manage time phased cost data and track key performance indicators for the entire project lifecycle.

Starting with the proposal phase, you can:

- Create data driven basis of estimates (BOEs) from documented source data such as historical estimate and actual cost data.
- Use the cost estimate data to quickly establish the project's budget baseline.
- Easily measure progress, import actual costs, and maintain estimate to complete data to forecast the cost at completion throughout the execution phase.
- Automatically maintain a historical archive of budget changes with a complete set of data-backed documentation for approved budget changes and work authorizations.
- Proactively track enterprise key performance indicators such as cash flow, revenue, or resource capacity and demand across pipeline and active projects.

It comes full circle as work is completed. Simply update the historical actual cost library for use in the next proposal.



*ProjStream's central database and workflow enables team collaboration.  
 Leverage the software tools to establish repeatable processes and enterprise data views.*

## About ProjStream

For over 10 years, ProjStream has provided innovative software solutions for creating data driven cost estimates and managing project cost data for government contractors. Our mission is to help our clients create and maintain quality data easier and faster.

## BOEMax

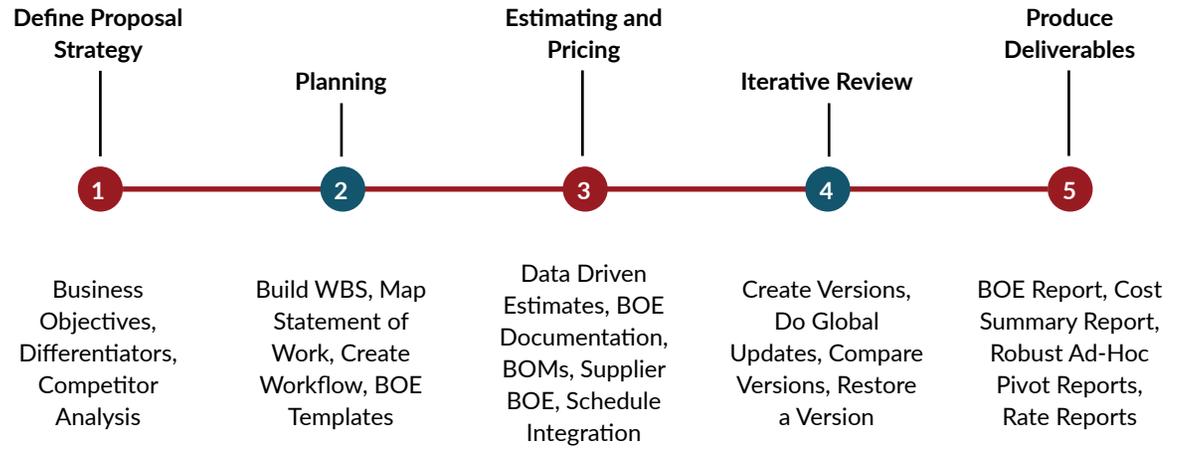
BOEMax helps your proposal teams produce realistic estimates using a foundation of searchable historical data and process standards. It becomes “command central” for proposal teams to organize their data, collaborate, and manage the estimate development process to create a winning proposal.

BOEMax is designed to ensure top down and bottom up traceability and help proposal teams create data driven cost estimates easier and faster.

### Work Smarter

Leverage the central database to organize a common set of consistent and reliable source data for proposal teams using:

- Historical estimates and actual costs. Estimators can search the database for projects or tasks with similar work scope for analogous estimating.
- A library of repeatable process templates with cost estimating relationship data for common tasks. Estimators can search the library and apply complexity or quantity multipliers to selected tasks to align with the proposal scope of work.



### Foundation of Consistent and Reliable Source Data, Repeatable Process Standards

*Supports your proposal process. Define your business objectives, then create a credible cost estimate to win the contract.*

- Master list of single parts or assemblies. Estimators can search the master parts list to build their project specific bill of materials.

### Collaborate

With a shared database and built-in workflow, the entire proposal team can view the complete set of cost estimate data for their proposal project and follow the development process. Is the team meeting the strategic business objectives for the proposal?

The proposal manager defines the workflow roles and responsibility assignments so everyone on the proposal team knows when something is in their work queue. The built-in audit log tracks who made changes to what data when.

### Go Digital

Turn historical standards and proposal team member expertise into digital content. Capture technical team member rationale, assumptions, notes, comparative analysis, algorithms, or risk assessments in rich text documents stored with the cost data at the project, WBS element, work package, or resource level.

The customer can easily verify the rationale and trace how the cost estimate was determined. The BOEMax database provides valuable context and source data for proposal teams to create the next winning proposal. Project control teams can also leverage the cost estimate at contract award to quickly create the budget plan.

## MaxTeam

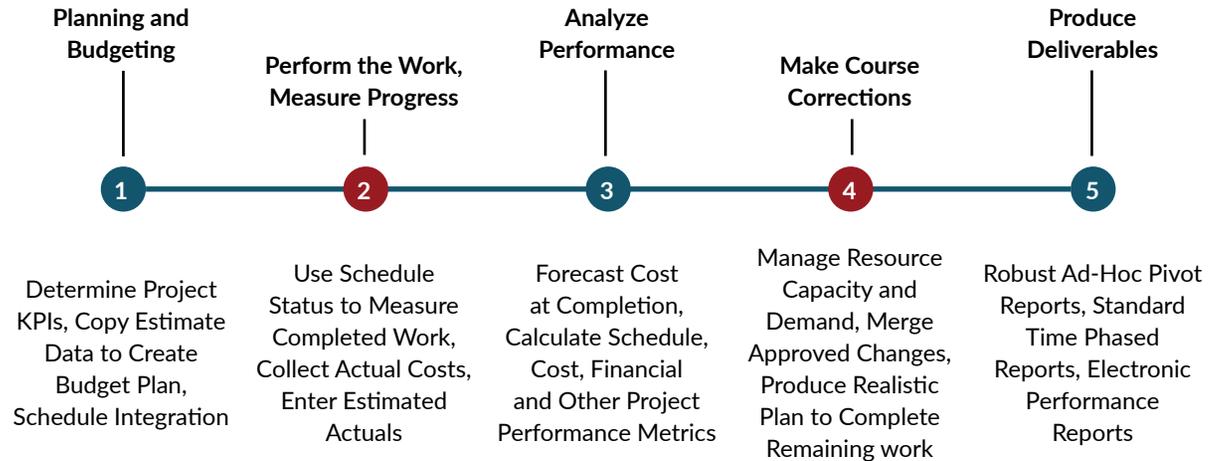
MaxTeam helps your project control team produce a realistic budget plan after contract award using the foundation of the data driven cost estimate from BOEMax. It becomes “command central” for project control teams to maintain the budget data, manage resource capacity and demand, measure progress, import actual costs, track changes, and maintain the estimate to complete and forecast at completion.

Configure MaxTeam to track key performance indicators (KPIs), bookings, cash flow, revenue projections, and other performance metrics for data driven decision making at the project or enterprise level.

### Work Smarter

Leverage the central database and easy to use grid view to maintain reliable time phased cost data for the duration of the project using:

- The proposal project to quickly organize the source data to produce the budget plan.
- Schedule integration to maintain driven budget and estimate to complete data as well as measure progress. Ensures full traceability between the schedule resource loaded activities and cost data.



### Foundation of Reliable Source Data for Management Visibility and Control

*Supports your project control and resource management process at the project, business unit, and enterprise level.*

- The built-in workflow to automatically track budget changes. The project control team can maintain historical traceability as approved changes are merged into the budget plan.

### Collaborate

Whether at the project, business unit, or enterprise level, the shared database provides relevant source data and performance metrics for project control teams, project managers, functional managers, and executive managers to proactively track work performance as well as financial performance of the projects.

Are project objectives being met? Is resource capacity and demand in balance? Are financial

goals such as profit margins being met? What corrective actions need to be made to meet objectives?

### Go Digital

Simplify creating and maintaining time phased data for the duration of the project with a central database.

Combine the cost data with rich text documentation in one database. The built-in workflow configured to match your change control process ensures all budget changes are automatically captured. Import data from anywhere to build a central source of relevant data needed for project performance and financial analysis.

## MaxBoard

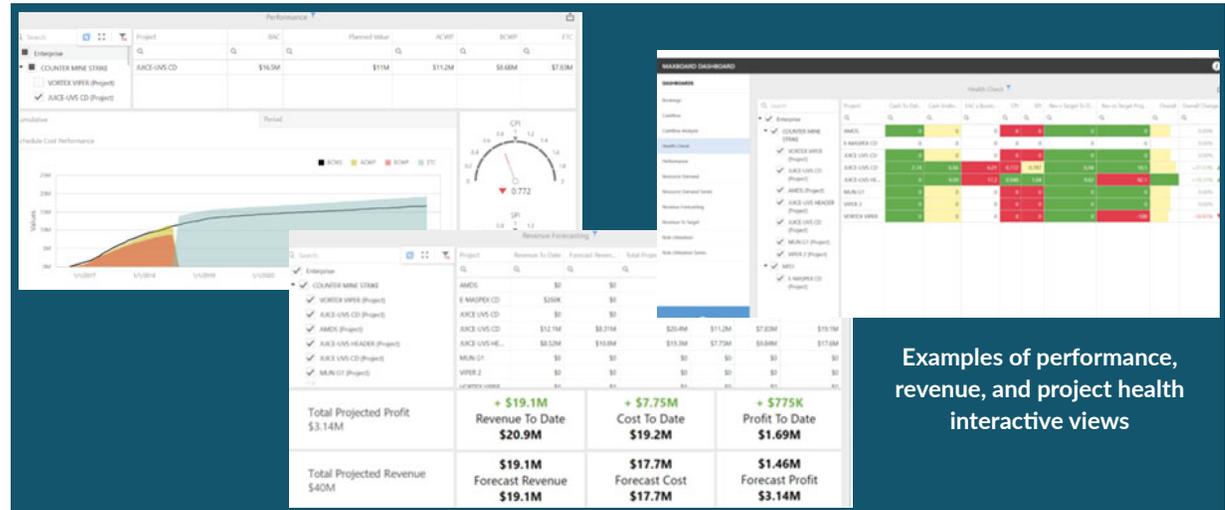
Using the shared BOEMax and MaxTeam database, MaxBoard provides an interactive dashboard for project managers, functional managers, finance, and executive management to track performance trends or identify areas of concern.

MaxBoard helps managers and others to easily assess work progress, resource capacity and demand, and financial metrics across the enterprise.

### Measure

Configure key performance indicators (KPIs) and produce metrics to match business objectives for a specific project, a group of projects, or enterprise wide. Examples include:

- Setting thresholds for common work performance metrics such as schedule and cost variances, variance at completion, schedule or cost performance indices, and to complete performance index useful for verifying forecasts at completion.
- Comparing bookings for a contract to the forecast at completion and estimating when the contract will hit specific spend points.



Use MaxBoard's interactive dashboard to quickly assess project performance and make data driven management decisions.

- Revenue forecasting and revenue to target analysis as well as revenue calculations based on cash flow projections.
- Analyzing resource capacity and demand for pending new projects and existing projects.
- Overall project health indicators. Assign each KPI a weight to set the relative importance of each metric.

### Manage

With reliable source data to manage project cost and resources from proposal to project closeout, managers at all levels have visibility into the current work progress and financial status. They can proactively handle realized risks or take advantage of opportunities to meet or exceed project and financial objectives.

The quality of the data continues to build over time with increasing benefits. Proposal teams are able to produce more accurate cost estimates to meet target profit margins. Project control teams are able to produce realistic budget plans and estimates to complete to meet technical, schedule, and cost objectives.

### Go Visual

Why use static reports and presentations? MaxBoard's interactive visual dashboard helps managers to quickly assess performance metrics. They can drill down into the data to identify specific contracts or elements of work requiring management attention. With a combined view of pipeline and active projects, they can assess the capacity and demand for critical personnel using different proposal win probabilities.

## What's Your Management Challenge?

ProjStream's software tools are designed to enable different functional roles to use a central database of proposal and time phased cost data for management visibility and control. This includes new business or capture teams, proposal managers, proposal teams, project managers, project control teams, resource managers, finance, contract managers, and all levels of executive management.

Management Challenge	Solution	Outcome	BOEMax	MaxTeam	MaxBoard
Proposal teams lack access to historical estimate data, actual costs, and bills of material to be able to produce realistic cost estimates.	Establish a central database to collect estimate data for all proposals, actual costs, and bills of material.	Proposal teams can search the central database for historical data to create their proposal data and substantiate the basis for their cost estimate.	✓		
Lack the ability to verify the basis for cost estimates. Quantifiable backup data such as BOE rationale, calculation methodology, risk assessment, and assumption documentation are unavailable.	Establish a set of cost estimate templates with the ability for proposal teams to enter BOE rationale, risks, and assumptions text as well as link related documents for the specific work elements.	Proposal teams have a common foundation to build their cost estimates. Text is stored in the same database as the cost data along with the link to related documents. Others can easily verify the BOE rationale.	✓		
It takes too long to produce proposals and the proposals lack consistency in approach.	Establish a central proposal database with built-in workflow so proposal teams can share data, collaborate, and track who is responsible for doing what when. Maintain a library of cost estimating relationship (CER) templates and bills of material proposal teams can leverage.	Significantly reduces the time required and improves the quality of the proposal content because proposal teams are using verifiable source data and consistent process for producing the cost estimates. You can respond to more RFP's per year and increase your win rate.	✓		
Lack consistency in how project control teams create budget plans, determine progress, track actual costs, and produce estimate to complete data. Limits management's ability to mitigate realized risks and produce credible cost at completion forecasts.	Establish a central cost management database with a standard configuration for all project teams to maintain funding, budget, performance, actual cost, estimate to complete, and at completion forecast data.	Management has useful source project data to do performance and financial analysis for selected projects, across business units, or enterprise wide. Management is able to proactively identify elements of work that require additional attention to meet project and business objectives.		✓	✓
Lack credible source data to determine resource capacity and demand to support pending new contract awards and existing projects.	Establish a central proposal and cost management database using a common library of resource roles and capacity settings. Proposal and project resource assignments are mapped to the resource roles to enable cross-project analysis.	Management can proactively balance resource capacity and demand across the enterprise. Increases resource planning predictability as well as employee retention.	✓	✓	✓
Change control process is cumbersome. It is difficult to maintain budget historical traceability and document changes.	Built-in workflow designed to support the change control process that automatically maintains data traceability and related documentation.	Changes are automatically tracked with the updated estimate to do the work, baseline change requests, and work authorizations.	✓	✓	
Lack ability to manage project bookings, cash flow, and revenue projections to ensure profit margins are met.	Establish a central cost management database with configurable KPIs and financial metrics to analyze performance for one or more projects.	Management can use interactive data views for comprehensive portfolio management and financial analysis such as return on investment.		✓	✓

## Feature Reference

Function	BOEMax	MaxTeam	MaxBoard
Set up unlimited number of user defined fields to support project unique data views and reporting requirements	✓	✓	
Import from anywhere using MS Excel - examples include bills of material, actual costs, and rates	✓	✓	
Define custom key performance indicators (KPIs), thresholds for tripping KPIs, relative weight of KPIs to create project health dashboards		✓	✓
Define project specific bookings or funding profiles, revenue calculations, and payment terms to calculate a variety of performance metrics		✓	✓
Establish standard calendar, rate template and rate calculations, and hierarchical resource structures	✓	✓	
Establish a common library of resource roles, assign resource roles to project specific resources for enterprise wide resource capacity and demand analysis	✓	✓	✓
Import or build work breakdown structures (WBS), parse a statement of work	✓	✓	
Integrated estimating and pricing, cost and price modeling, versioning	✓		
Broad range of estimate methodologies including bottoms up, expert judgment, analogous, multiplier, travel, material, and parametric	✓		
Easy to use grid view similar to Excel to enter data with built-in hierarchical structure to view the data at summary, intermediate, and detail levels	✓	✓	
Enter estimate or budget in hours, full time equivalents (FTEs), or direct cost; select the rate structure to apply direct and indirect rates	✓	✓	
Schedule integration; create budget or estimate to complete data from resource loaded activities, use status as basis for measuring completed work	✓	✓	

Function	BOEMax	MaxTeam	MaxBoard
Built-in workflow and standard workflow forms to manage the proposal process as well as the budget change control process	✓	✓	
Automated change tracking with transaction audit trail and versioning	✓	✓	
Ability to enter rich text with the BOE rationale and other documentation along with time phased cost data - all in the same database	✓	✓	
Establish a searchable library of historical cost estimates and actual costs	✓		
Establish a library of templates for repeatable work processes	✓		
Establish a library of common hierarchical bills of material (BOMs) to create project specific BOMs.	✓	✓	
Copy proposal cost estimate as the basis to create the time phased budget plan		✓	
Identify control accounts at any level within the WBS, control accounts can be at different levels for different legs of the WBS	✓	✓	
Supports standard earned value techniques		✓	
Define unlimited number of cost codes	✓	✓	
Ability to enter or calculate an unlimited range of forecasts at completion		✓	✓
Calculate standard earned value performance metrics		✓	✓
Built-in standard cost summary reports	✓		
Built-in cost data validation analysis view and report to identify common data anomalies		✓	
Built-in standard project performance reports and electronic deliverables for government customers		✓	
Pivot table and robust ad-hoc reports, easy to use report wizard	✓	✓	
Built-in standard line charts and graphs, interactive dashboard view of performance variances and metrics			✓
Single project and cross-project reporting for proposal and active projects	✓	✓	✓

Interested in learning more  
about ProjStream's tools  
BOEMax, MaxTeam, and  
MaxBoard?

Visit us at [www.projstream.com](http://www.projstream.com)

or call us at 800.914.1710

