

Project risk management process

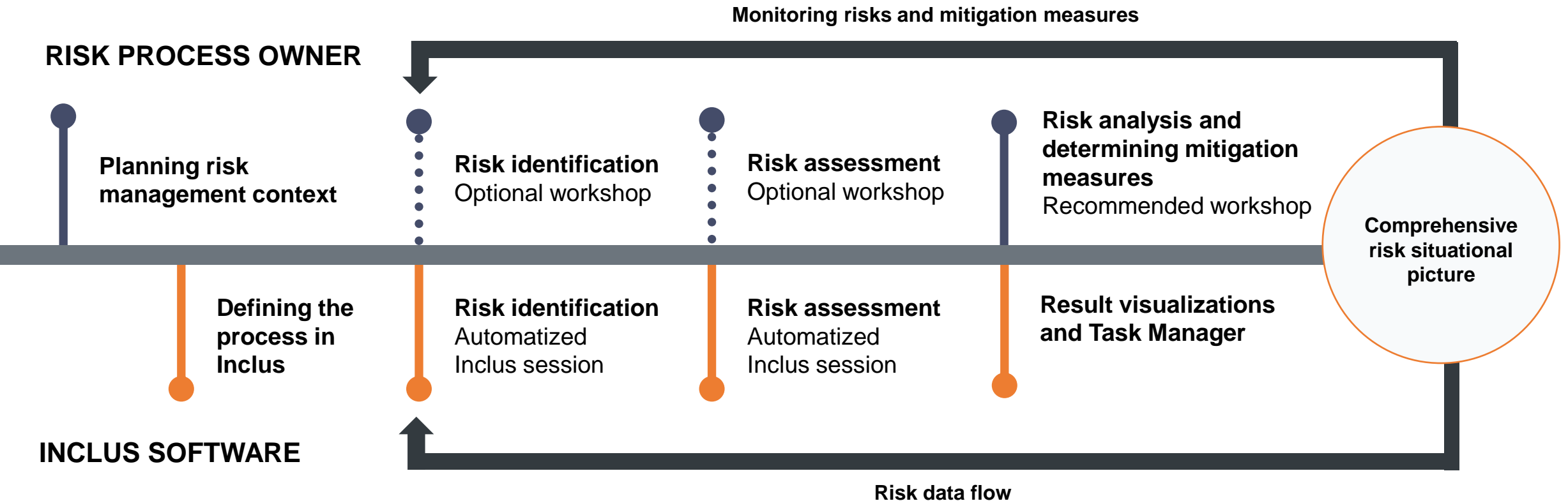
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01/2022

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Risk management process overview





User management and process setup

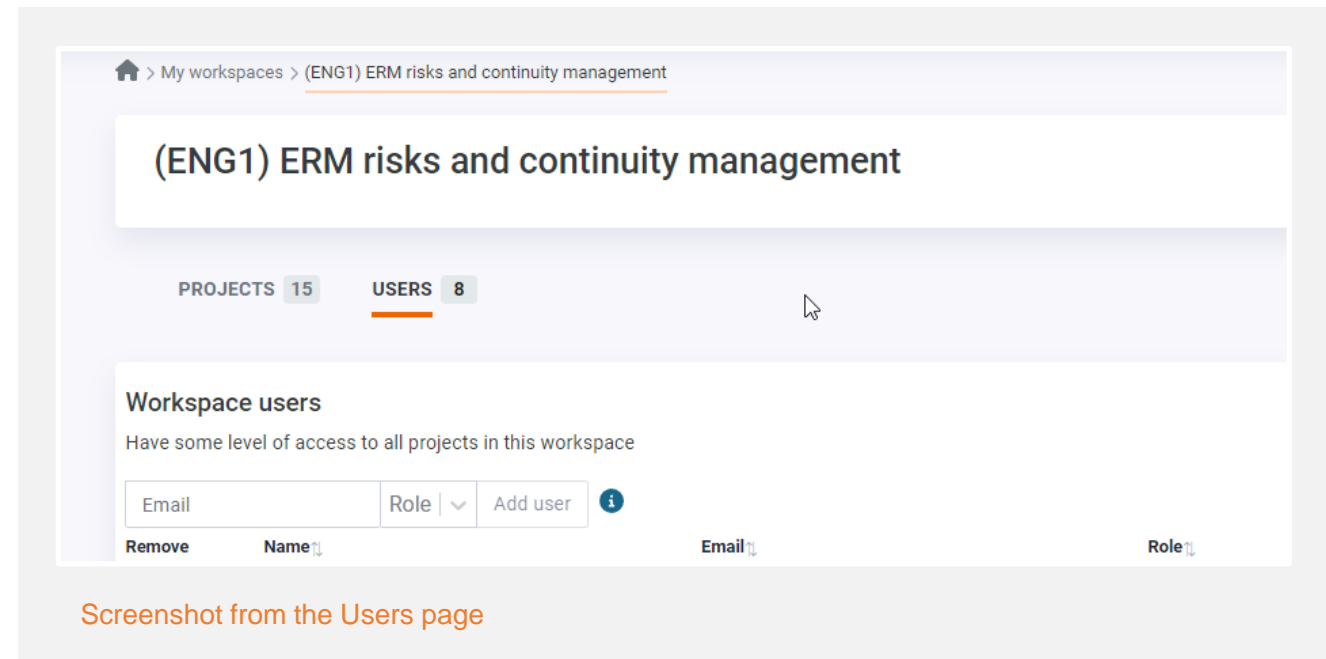
User management

1. Login

- You will get invited to use inclus via email
- You will be asked to create a password before accessing the workspace
- Your User ID is your email address

2. Adding user rights

- Admins can add different levels of user rights for the workspace (admin/user/reporter/viewer)



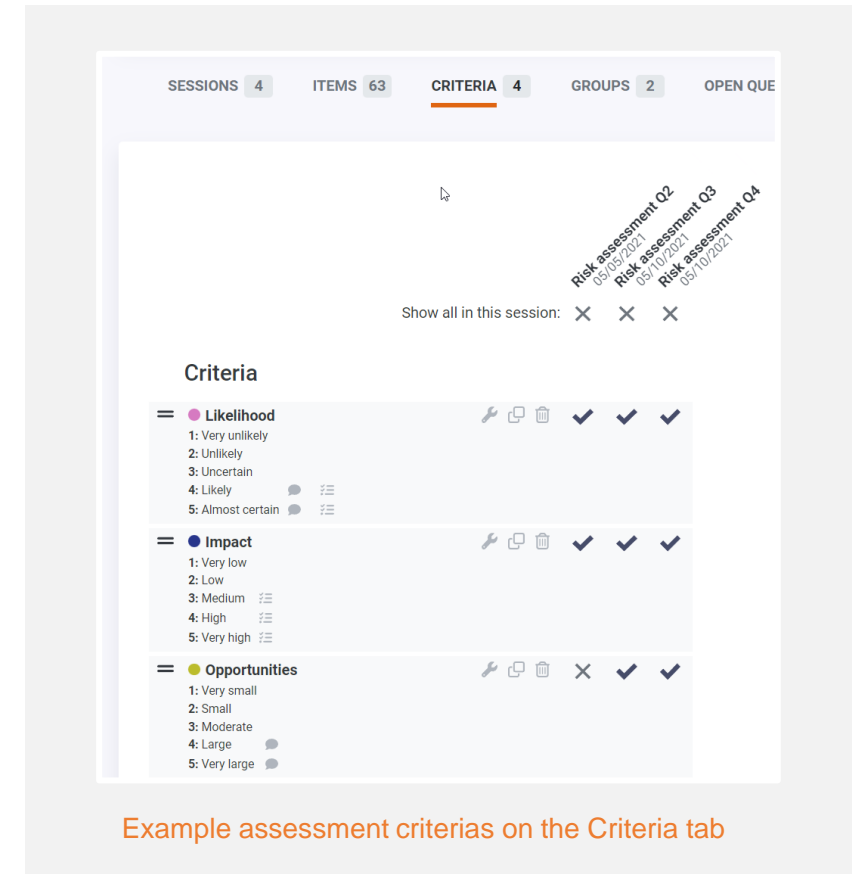
Adding risk list (risk process owner)

- From the **Items tab** it is simple to create a risk list
- The risk process owner can define which risks are active in different sessions by clicking the ☒ symbol to deactivate certain risk items
- New risks can be added from excel or manually from the button: "Add new item"

Example risk list on the Items tab

Setting the risk assessment criteria

- The risk owner determines suitable risk assessment criterias and settings in the **Criteria tab**
- Risks are often evaluated based on likelihood and impact
- Reach out to our customer success team if you are interested in using aggregate criterias, for example to calculate the total impact of risks



Setting background groups

- In the **Groups tab**, the risk process owner can define background group options for the participants. This is allows analyzing the results based on group
- You can add ready made groups based on function, unit, role or something else

The screenshot displays the 'Groups' tab in the Inklus system. At the top, a navigation bar shows counts for Sessions (4), Items (63), Criteria (4), Groups (2), Open Questions (0), and Invitations (6). Below this, a list of sessions is shown, including 'Identify risks' and four 'Risk assessment' sessions (Q1, Q2, Q3, Q4) with dates from 04/22/2021 to 05/10/2021. A 'Show all in this session:' filter is present. The main section, titled '= Your unit', lists five background groups: Management, HR, Finance, Sales, and Customer service. Each group has a set of icons for editing, deleting, and selecting for each session. The 'Finance' group is selected for the 'Identify risks' session and the first 'Risk assessment' session. An 'Add new group' button is at the bottom.

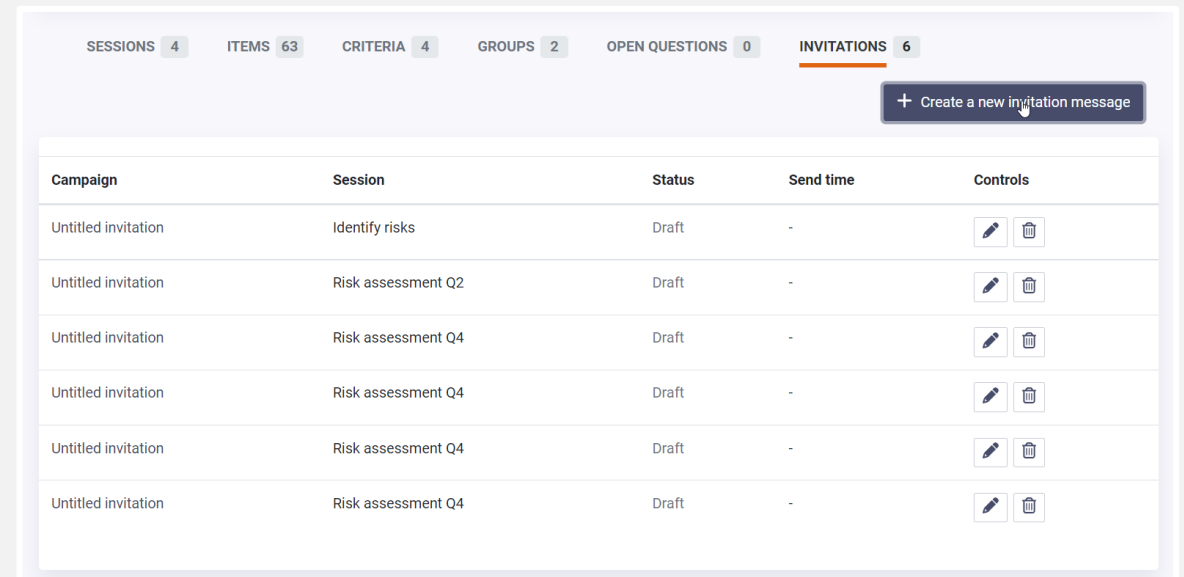
Example background groups on the Groups tab















Inclusive risk identification and assessment

Sending the questionnaire link to participants

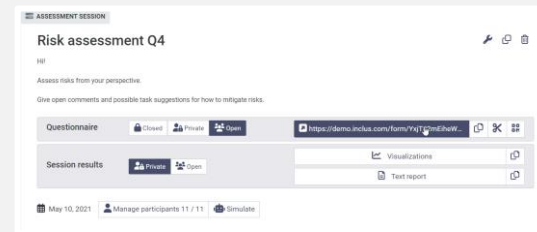
- Questionnaire invitations can be sent directly from Inklus from the **Invitations tab**
- You can also copy and share a direct url or QR code to the session



The screenshot shows the 'INVITATIONS' tab in the Inklus interface. At the top, there are navigation tabs: SESSIONS (4), ITEMS (63), CRITERIA (4), GROUPS (2), OPEN QUESTIONS (0), and INVITATIONS (6). Below these is a button that says '+ Create a new invitation message'. The main area contains a table with the following columns: Campaign, Session, Status, Send time, and Controls.

Campaign	Session	Status	Send time	Controls
Untitled invitation	Identify risks	Draft	-	 
Untitled invitation	Risk assessment Q2	Draft	-	 
Untitled invitation	Risk assessment Q4	Draft	-	 
Untitled invitation	Risk assessment Q4	Draft	-	 
Untitled invitation	Risk assessment Q4	Draft	-	 
Untitled invitation	Risk assessment Q4	Draft	-	 

Screenshot from the Invitations tab



Copying session URL on the Sessions tab



Example QR code of session URL

Inclusive risk identification

- In the risk identification phase you can engage different units and functions to identify risks from their operation point of view
- Participants can add new risk suggestions under the defined risk categories
- Participants can share their thoughts via the comment bubble icon
- Risks can be prioritized by flagging or giving thumbs up – indicating that the risk should be assessed more thoroughly
- The risk process owner gets a comprehensive view of relevant risks to assess further in the next phase

Please, choose your group first

Designer Main contractor Subcontractor 1 **Project supervisor** Stakeholder A Project consultant

Search or suggest:
Write your suggestion here Add suggestion

● Project related risks

Risks related to construction action and needs	👍 4 💬 3
Risks related to quality and/or standards	👍 3 💬 1
Risks related to time table	👍 2 💬
Risks related to the size of the project	👍 1 💬
Budgetary risks	👍 💬
Logistics risk A <small>ADDED FROM A SUGGESTION</small>	👍 💬

Add suggestion

Example identification session

Risk suggestion approval and editing

- After the risk identification round, the risk process owner can go through received suggestions and comments
- Risk owner is able to activate or deactivate the most relevant risks to be included in the risk assessment



Inclusive risk assessment

When the risk identification round is completed it is time for the risk assessment phase

- Risk items can be assessed for example based on likelihood, impact, opportunities or cost impact. This is determined on the **Criteria** tab
- Participants assess the included risks by giving numerical value for each criteria
- Comments and mitigation measure suggestions are also collected depending on the assessment criteria setup

The screenshot shows a web-based questionnaire titled "Project risk assessment, Q1". The breadcrumb trail at the top reads: "My workspaces > (ENG) Construction sector templates (archive) > Project Risk Management (general template) > Project Risk Assessment, Q1 > Questionnaire".

The main heading is "Project risk assessment, Q1" followed by "Hi!" and the instruction "Please assess the project risks based on your experience."

A section titled "Please, choose your group first" contains several buttons: "Designer", "Main contractor" (which is highlighted), "Subcontractor 1", "Project supervisor", "Stakeholder A", and "Project consultant".

Below this, a message states: "You are logged in as matias.sarvanne@inclus.com. Your answers will be saved automatically and available when logged in."

The main content area is titled "Project related risks" and features a table for assessment. The table has three columns: "Potential negative impact on the successful implementation of the project", "Likelihood", and "Opportunities".

There are two rows of assessment items:

- The first row is "Risks related to the size of the project". The first column has a dropdown menu showing "4: Large". The second and third columns have dropdown menus with question marks.
- The second row is "Risks related to construction action and needs". All three columns have dropdown menus with question marks.

Below the first row, there is a button labeled "Can you explain?".

Below the form, the text "Example risk assessment session" is displayed.



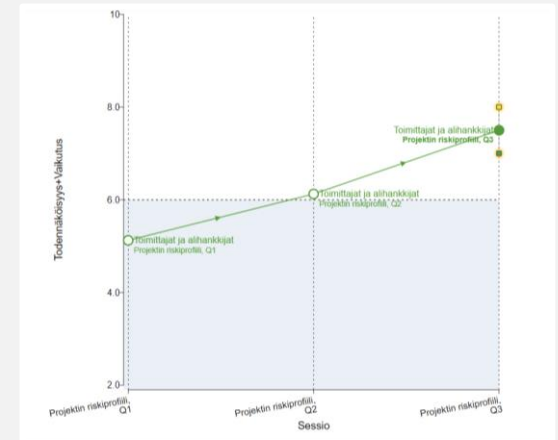
Risk results analysis and action planning

Project risk assessment results and situational picture

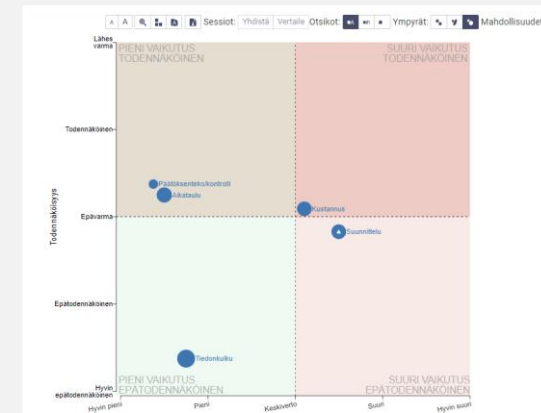
Risk process owner gets a comprehensive risk situational picture from the visualisation page

- Scatter plot can be modified choosing different criteria for the x- and y-axis. Criteria can be combined by sum or multiplication
- Risk development over time is possible to follow comparing data from different assessment sessions, for example Q1 and Q2 comparison
- Risk situation can be followed through aggregate criteria and one criteria for example could total impact of the risk

Example visualization of monitoring risk development



Example visualization showing relevant risks on a scatter plot



Adding and managing risk mitigation measures

Task suggestions

- Participants can add concrete task suggestions for risk mitigation directly on the assessment form
- When and where the task suggestions are asked is defined in the criteria setup
- After the risk assessment, the risk process owner can see all task suggestions in the Task Manager
- The risk process owner can then create or dismiss the suggestion. If dismissed, the suggestion is archived

● Strategiset riskit

	Vaikutus yrityksen toimintaan	Todennäköisyys
Liiketoiminnan kehitykseen liittyvät riskit	4: Suuri	4: Todennäköinen
Kuvaukset puuttuvat - ne tulee miettiä yrityksen kontekstissa	Millaisia tapahtumia ja vaikutuksia näet? (klikkaa tästä)	Millä toimenpiteillä riskiä tulisi hallita? (klikkaa tästä)
	Ehdota tehtävää riskin pienentämiseksi (1)	

Example assessment that gathers task suggestions

TASK MANAGER GANTT CHART

Task suggestions (3)

☐ Select all

☐ #3 Markkinariskit (kysyntä ja asiakastarpeet) ja kilpailutilanne

☐ Toimenpideehdotus 1

Selite

Vaikutus yrityksen toimintaan

Create task Dismiss

☐ #4 Teknologiariskit

☐ Jatkuvat koulutukset henkilöstölle nopeasti kehittyviin teknologioihin

Vaikutus yrityksen toimintaan

Create task Dismiss

☐ #16 Organisaatioon ja johtamiseen liittyvät riskit

☐ Koulutukset johtajille

Vaikutus yrityksen toimintaan

Create task Dismiss

Managing task suggestions in the Task Manager view

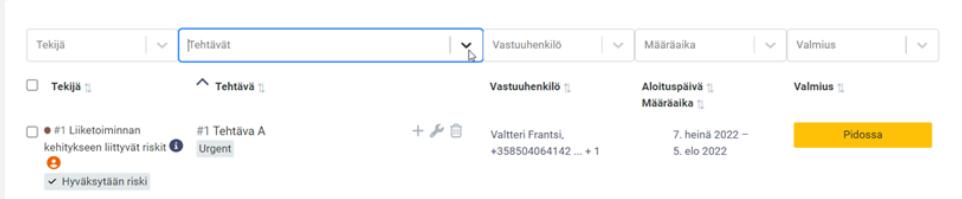
Adding tasks from visualizations and task filtering

Filtering tasks in task manager

- In the task manager you can filter tasks via risk items, tasks, responsible persons, deadline and status
- Admin users can see the whole list and can filter the view by these filters.
- Users see only tasks that are assigned to them

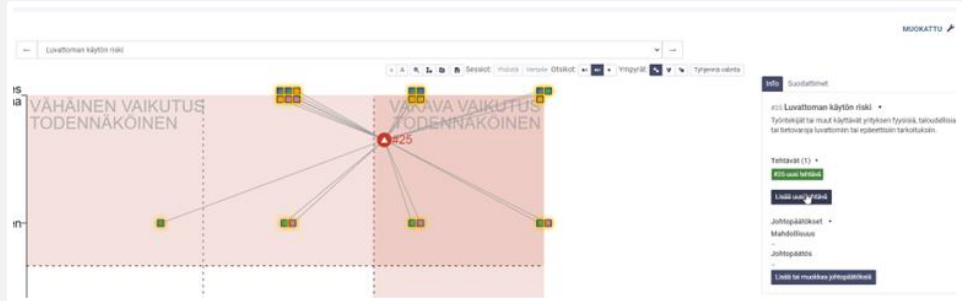
Adding tasks from the scatter plot

- Users can add tasks from the scatter plot by clicking the risk item dot and add tasks or conclusions from the info on the right



The screenshot shows the 'Task Manager' interface. At the top, there are several filter dropdowns: 'Tekijä' (empty), 'Tehtävät' (selected), 'Vastuuhenkilö' (empty), 'Määräaika' (empty), and 'Valmius' (empty). Below these, there are checkboxes for 'Tekijä', 'Tehtävä', 'Vastuuhenkilö', 'Aloituspäivä', and 'Valmius'. A task entry is visible: '#1 Liiketoiminnan kehitykseen liittyvät riskit' with a risk level of 'Urgent'. The responsible person is 'Valtteri Franssi, +358504064142 ... +1'. The start date is '7. heinä 2022' and the end date is '5. elo 2022'. A yellow button labeled 'Pidossa' is on the right.

Filtering tasks in the Task Manager



The screenshot shows the 'Visualizations' page. It features a scatter plot with a central red dot labeled '25' and several yellow dots connected to it by lines. The plot is divided into two regions labeled 'VAHVA VAIKUTUS TODENNÄKOINEN' and 'VÄHÄINEN VAIKUTUS TODENNÄKOINEN'. On the right, there is a panel titled 'Info' with a 'Suodattimet' section. It lists 'Tehtävät (1)' and 'Aloituspäivä'. There are buttons for 'Lisää uusi tehtävä', 'Lisää uusi riski', and 'Lisää tai muokkaa päätelmä'. A 'MUKAATTU' button is at the top right of the panel.

Adding tasks on the visualizations page

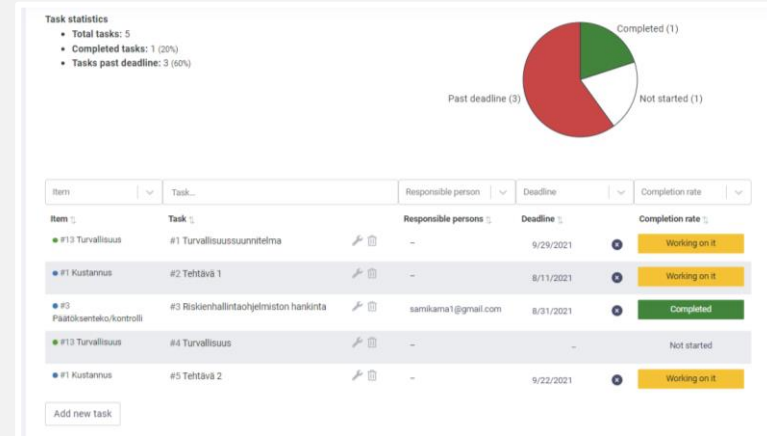
Adding and controlling the tasks from the task manager

After the risk assessment, risk process owner(s) can add tasks to control and mitigate risks

- Add new task
- Connect the task to a certain risk item
- Define responsible person, starting date and deadline

GANTT chart

- View and monitor tasks on a visual gantt chart
- Filter the view by category or possible tags
- Hide or show old and completed tasks
- Modify tasks by clicking the task name



Task Manager view

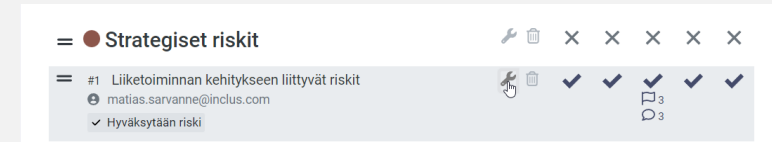


Task Manager GANTT chart view

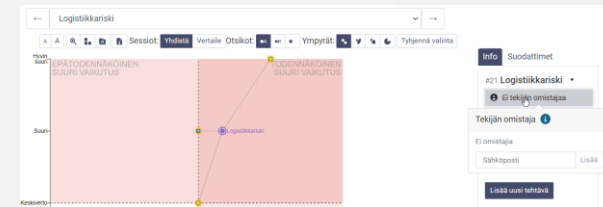
Adding risk item owner

Risk item owners

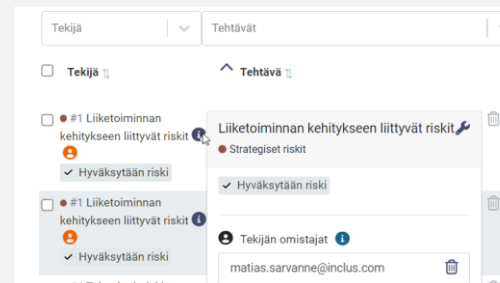
- You can add risk item owners for certain risks to increase the ownership of risks in different organization levels
- The risk item owner can be added from the risk item tab, visualizations page and the task manager
- Risk item owner gets email notifications about tasks that are linked to owned risks



Adding risk owner in Item list



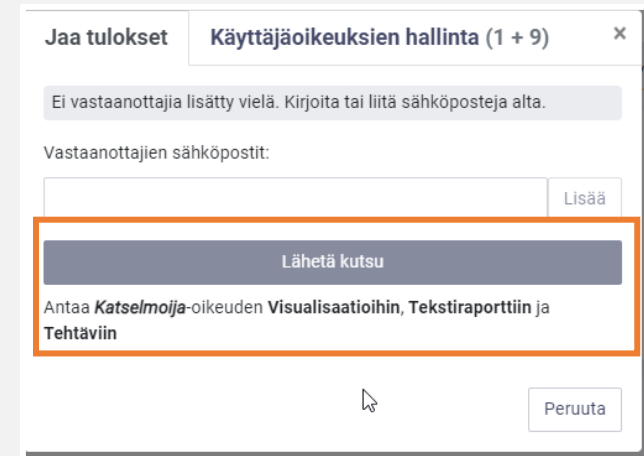
Adding risk owner in Visualizations



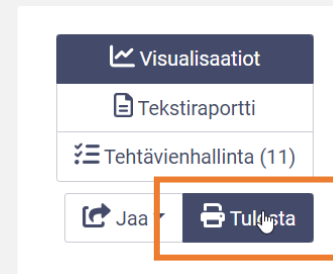
Adding risk owner in the Task Manager

Reporting the situational picture

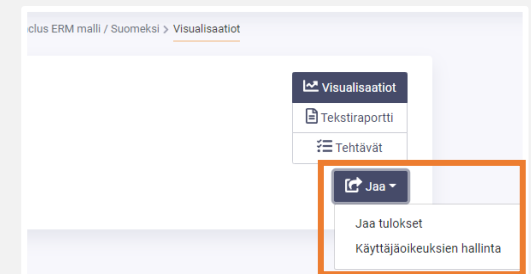
- The results view can be shared through a link sent via email
- The active results view can easily be printed as a PDF
- A link to the visualizations page and Task Manager can be shared via email



Sharing the results view



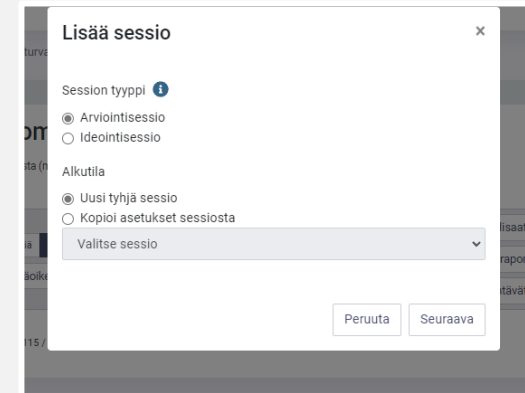
PDF Print button



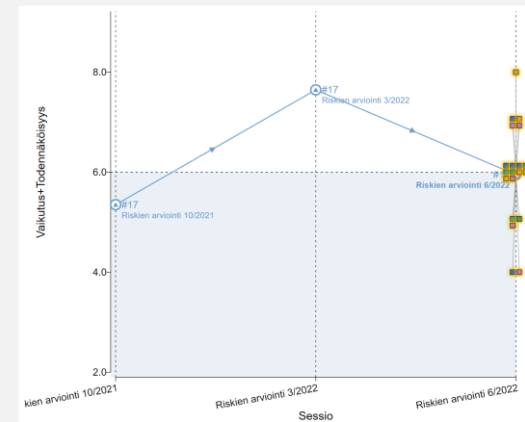
Sharing the results view

Continuous risk assessment

- Risk assessments can be repeated by adding a new session to the project
- Choosing the session type depending the needs:
 - Is there are need for identify new risks → risk identification session
 - Is there a need to assess the development of existing risks → assessment session
- Simple monitoring of risk development through the scatter plot



Creating a new assessment



Monitoring risk development

Automatized risk identification and assessment

Risk identification and assessment invitation can be automated on the invitations tab

- Invitations and reminders for online assessments can be made beforehand and scheduled
- Invitations can be repeated for example monthly or quarterly – creating new sessions automatically

The screenshot shows the 'KYSYLYKUTSUT' (Invitations) tab selected in the top navigation bar. The main content area is titled 'Uusi kutsuviesti' (New invitation message). Below the title, there is a paragraph explaining the purpose of the invitation and a button to 'Uusi kutsuviesti'. The main content area is divided into three sections: 'Lähetä ajastettuna' (Schedule for sending), 'Ajasta muistutuksia' (Schedule reminders), and 'Toista kutsu' (Repeat invitation).

Lähetä ajastettuna



17.01.2022 09:45

Ajastus ei voi olla menneisyydessä

Valitse lisätyistä vastaanottajista ajastettuna hetkenä

- ☒ Kaikki nyt lisätyt
- ☐ Ne, jotka silloin eivät ole vielä aloittaneet
- ☐ Ne, jotka silloin eivät ole vielä aloittaneet, tai ovat aloittaneet mutta eivät valmiita

Ajasta muistutuksia

Sähköpostin aihe	Lähetys ehdot	Status	Toiminnot
[MUISTUTUS] Q1 arviointi - Q4	Ne, jotka silloin eivät ole vielä aloittaneet	Valmistettu 24. tammikuuta 2022, klo 00:00	 

Ajasta muistutus

Toista kutsu

Toista tämä kutsu joka

2 ☐ päivä ☒ kuukausi

Kun tämä kutsu lähetetään, projektin luodaan automaattisesti uusi sessio ja ajastettu kutsuviesti. Kutsujen toistaminen jatkuu kunnes perutaan toiminnon. Ensimmäinen toistokutsu lähetetään 17. maaliskuuta 2022, klo 09:45 uudelle sessiolle nimeltä Riskien arviointi 7/2022.

Tallenna luonnos ja palaa Tarkista ja lähetä ajastettuna

Setup recurring sessions and invites

Project portfolio management/Benchmarking

- The benchmarking functionality consolidates result data from different projects to the same visualizations page. This enables monitoring the entire project portfolio's risk management
- Reach out to us for more information about benchmarking: support@inclus.com

