Project risk management process

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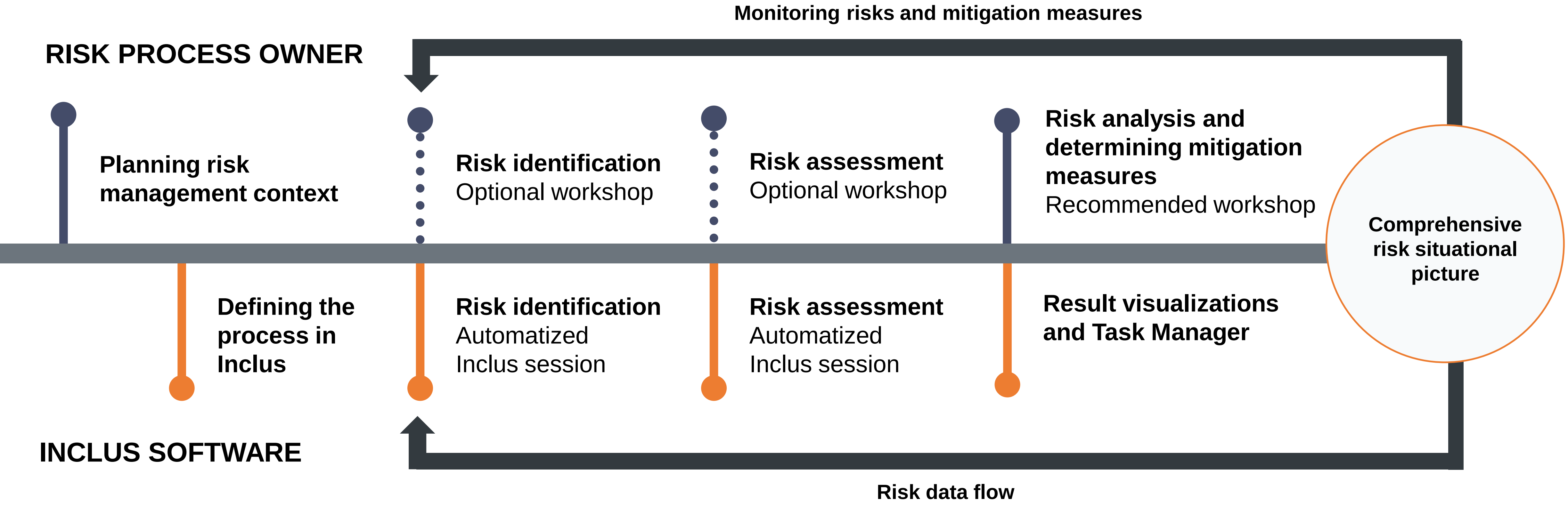
www.inclus.com

Risk management process overview



User management and process setup

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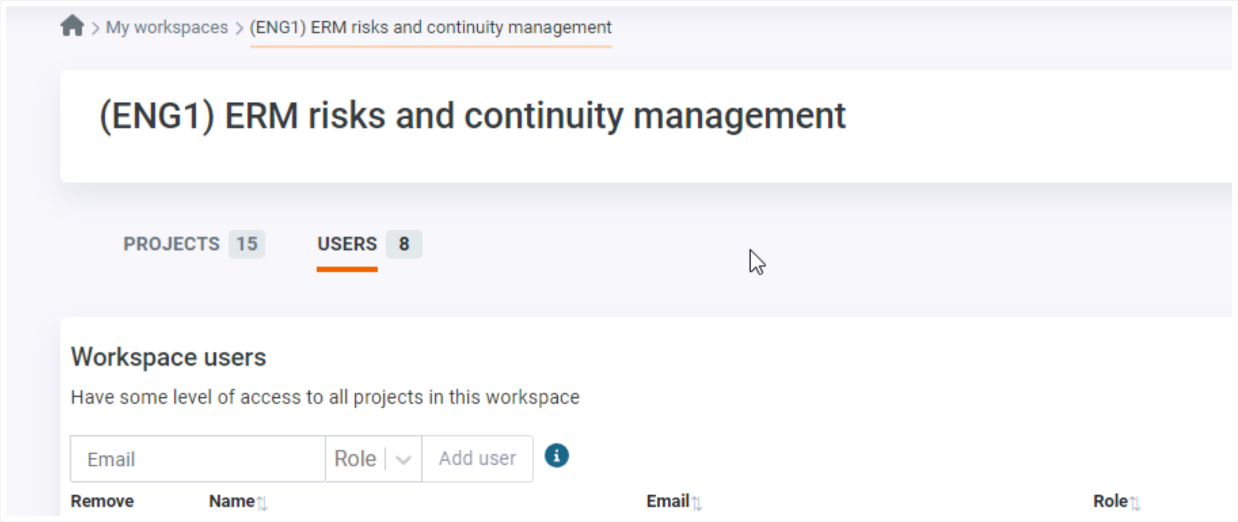
User management

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)



Screenshot from the Users page

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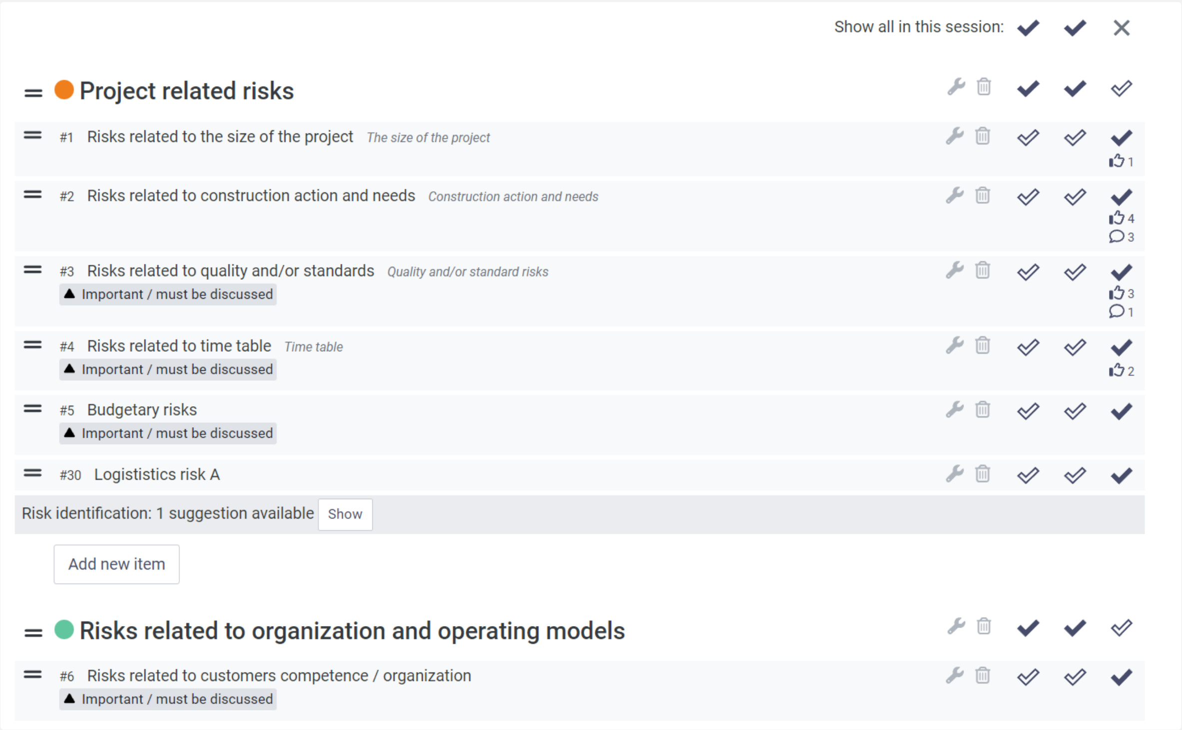
Adding risk list (risk process owner)

- 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

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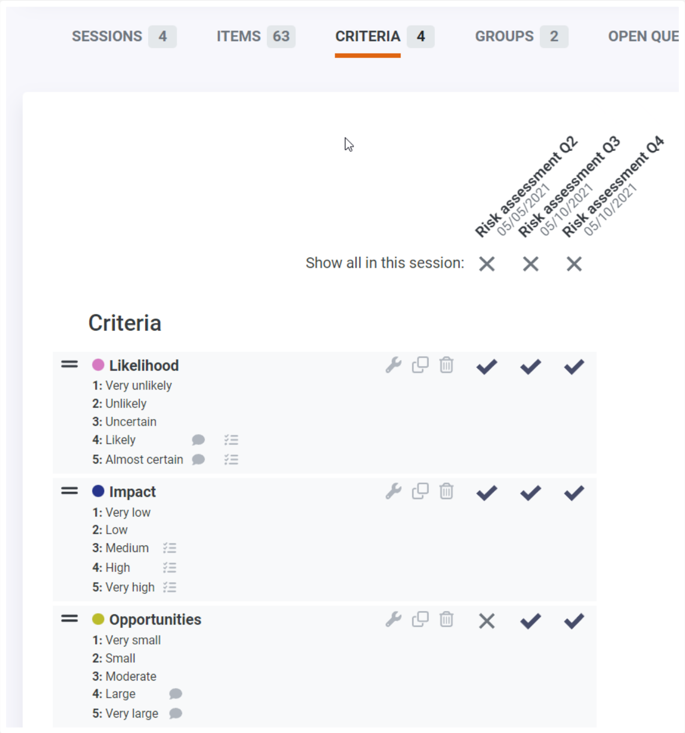
Setting the risk assessment criteria

- 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

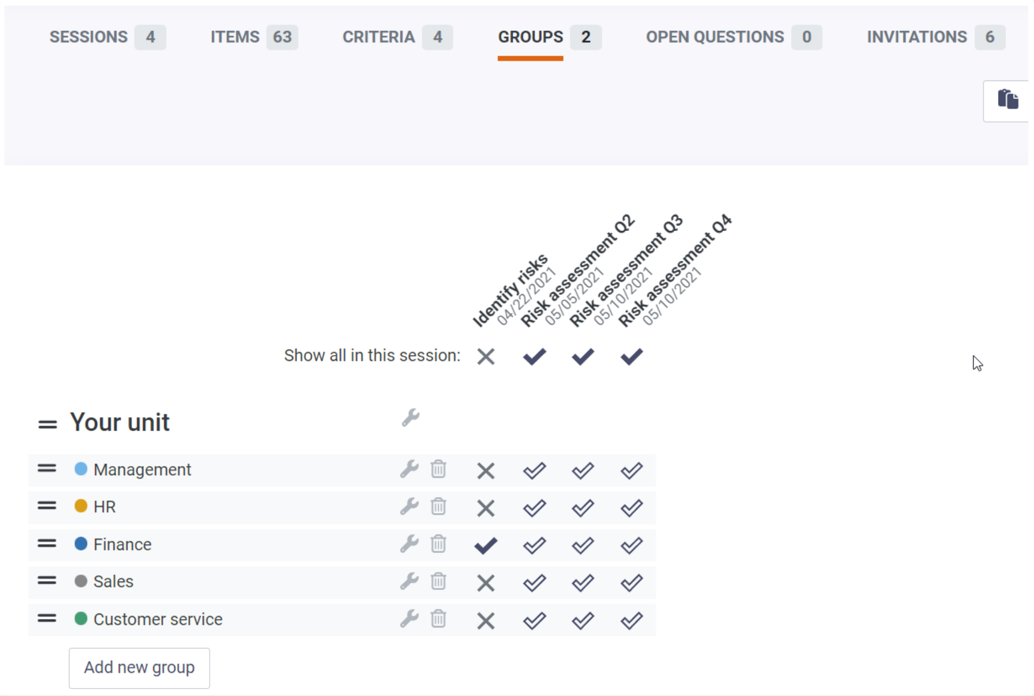


Example assessment criterias on the Criteria tab

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



Example background groups on the Groups tab

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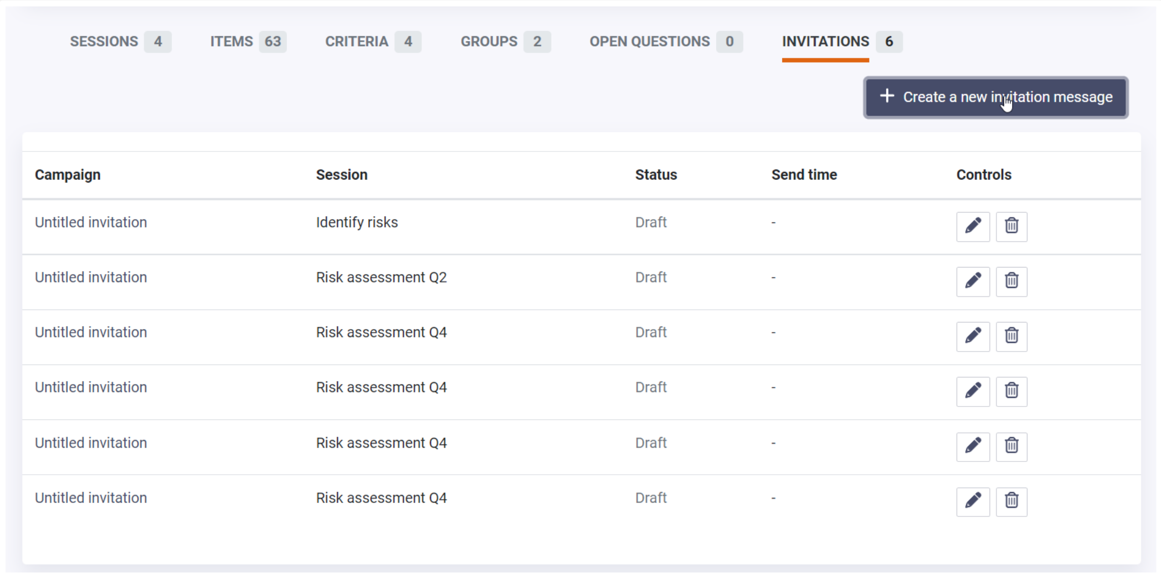
Inclusive risk identification and assessment

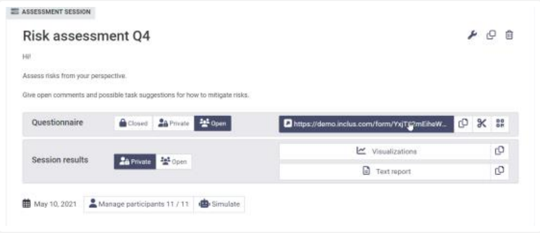
Sending the questionnaire link to participants

- Questionnaire invitations can be sent directly from Inclus from the **Invitations tab**

- You can also copy and share a direct url or QR code to the session



Screenshot from the Invitations tab



Copying session URL on the Sessions tab

Example QR code of session URL

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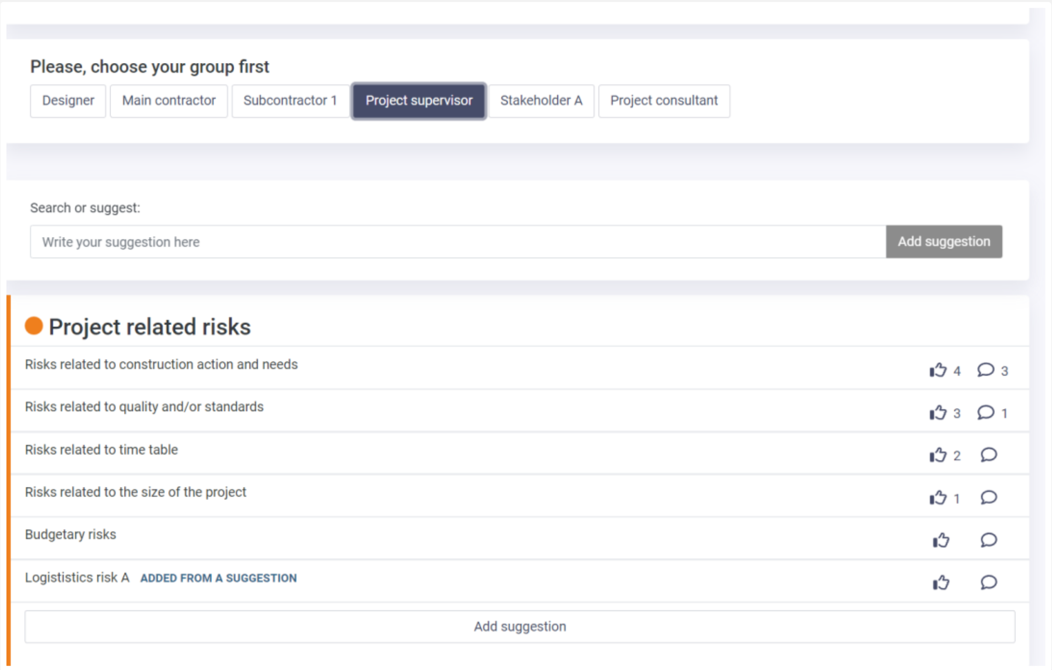
Inclusive risk identification

- 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



Example identification session

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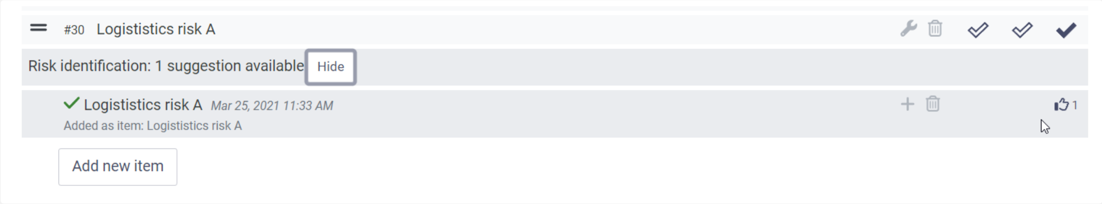
Risk suggestion approval and editing

- 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



Risk process owner view of viewing risk suggestions

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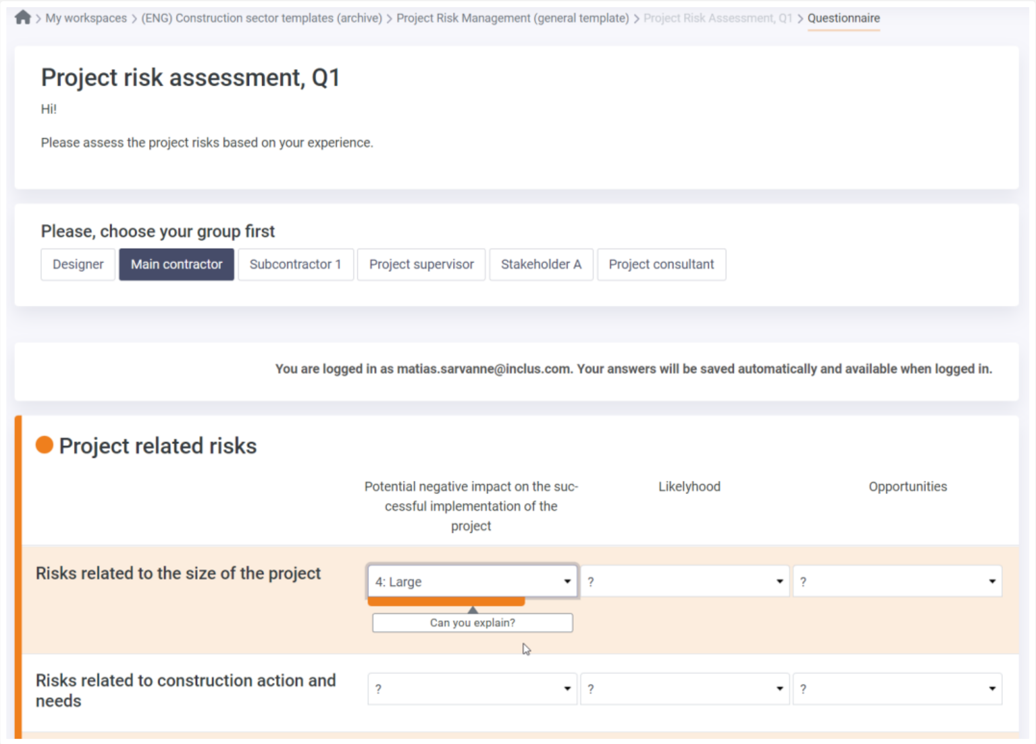
Inclusive risk assessment

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



Example risk assessment session

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Risk results analysis and action planning

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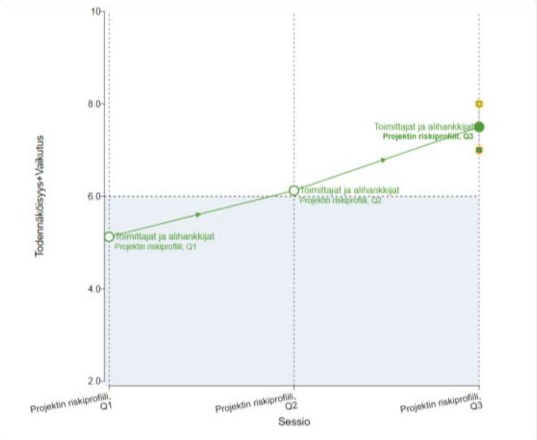
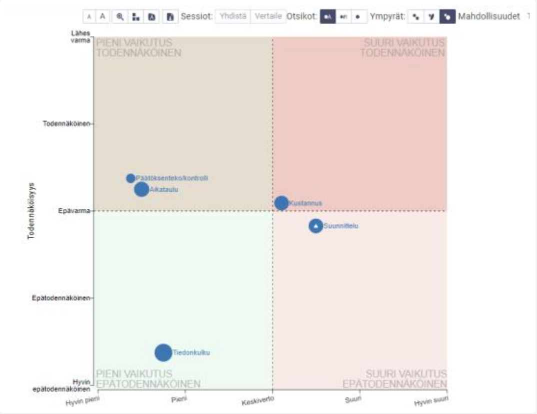
Project risk assessment results and situational picture

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

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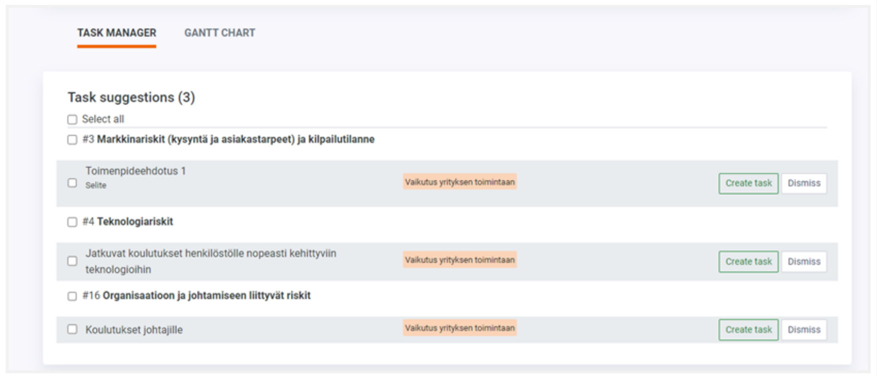
Adding and managing risk mitigation measures

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

Example assessment that gathers task suggestions



Managing task suggestions in the Task Manager view

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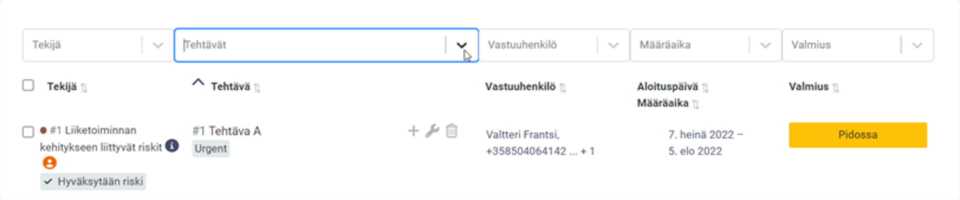
Adding tasks from visualizations and task filtering

Filtering tasks in task manager

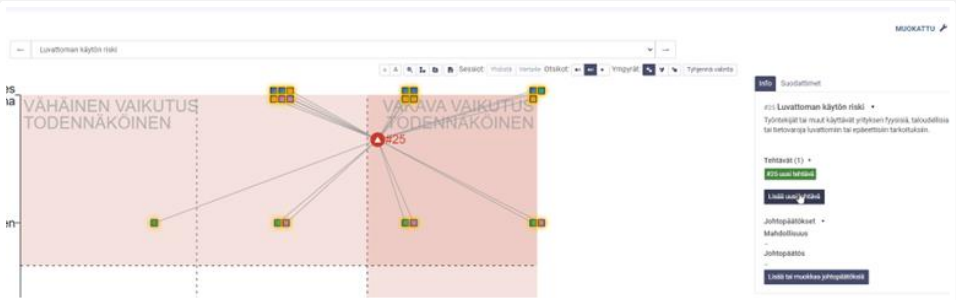
- In the task manager you can be filter tasks via risk items, tasks, responsible persons, deadline and status
- Admin users can see the whole list and can filter the view by these filters.
- Users see only tasks that are assigned to them

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



Filtering tasks in the Task Manager



Adding tasks on the visualizations page

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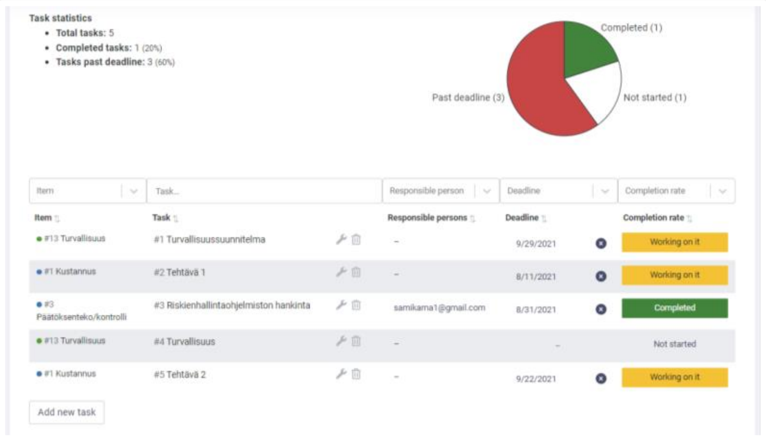
Adding and controlling the tasks from the task manager

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

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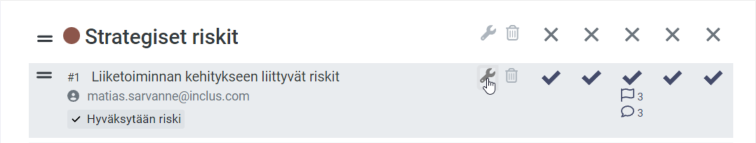
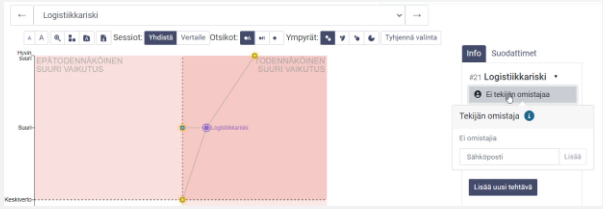
Adding risk item owner

Risk item owners

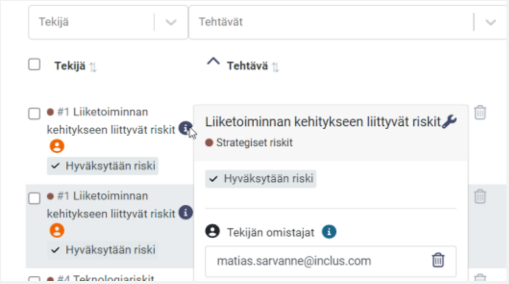
- You can add risk item owners for certain risks to increase the ownership of risks in different organization levels
- The risk item owner can be added from the risk item tab, visualizations page and the task manager
- Risk item owner gets email notifications about tasks that are linked to owned risks



Adding risk owner in Item list



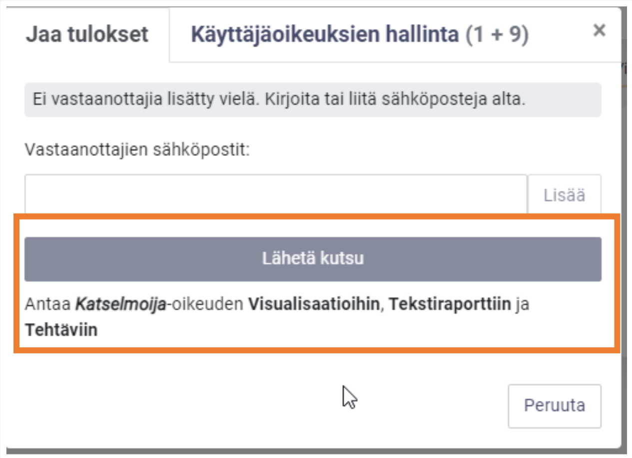
Adding risk owner in Visualizations



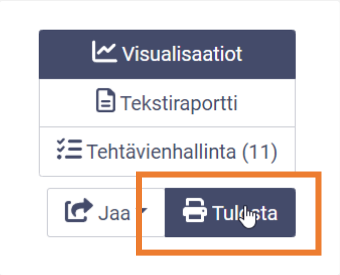
Adding risk owner in the Task Manager

Reporting the situational picture

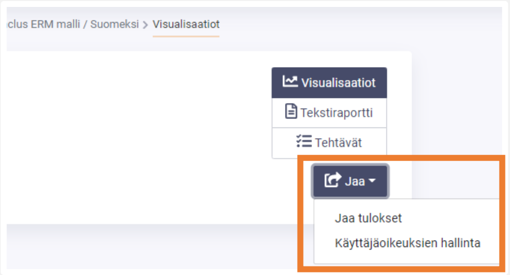
- The results view can be shared through a link sent via email
- The active results view can easily be printed as a PDF
- A link to the visualizations page and Task Manager can be shared via email



Sharing the results view



PDF Print button



Sharing the results view

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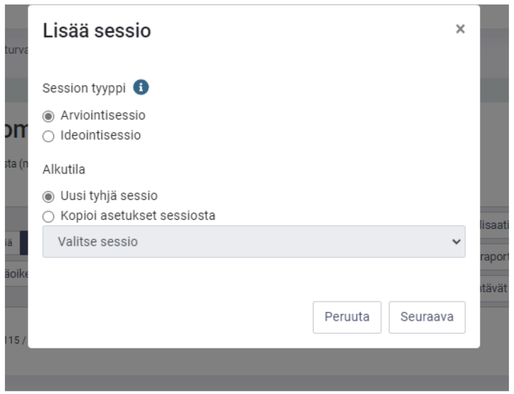
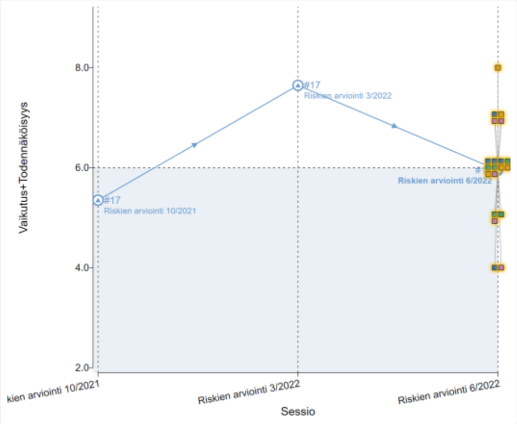
Continuous risk assessment

- 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

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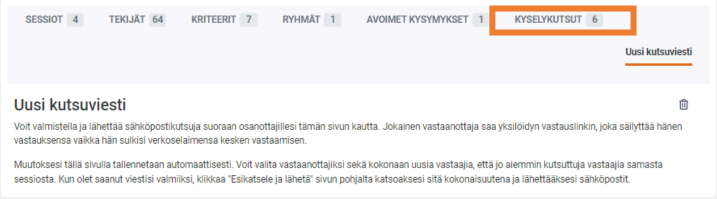
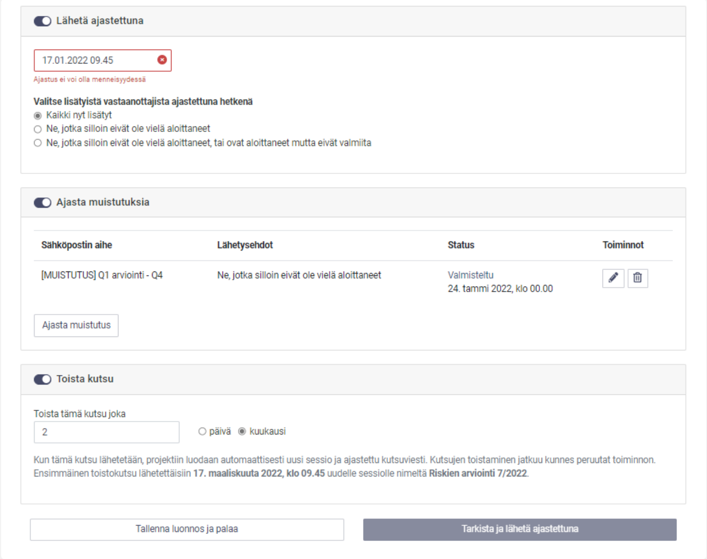
Automatized risk identification and assessment

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



Manage your session invitations on the Invitations tab



Setup recurring sessions and invites

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Project portfolio management/Benchmarking

- The benchmarking functionality consolidates result data from different projects to the same visualizations page. This enables monitoring the entire project porftolio’s risk management

- Reach out to us for more information about benchmarking: support@inclus.com

Example benchmarking view

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