

ENGINEUNITY TUTORIAL



Analysis Tools



Analysis Tools

Measuring Performance

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Assessing performance Help

- Management consultant report
- Financial analysis
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- Job performance
- Impact of world events
- Client history
- Consultant history
- Project manager history

INDICATORS

PERFORMANCE SUMMARY

COLUMN TO SEE HOW THE SELECTED KEY PERFORMANCE INDICATOR WAS CALCULATED

	Turnover	Gross profit to Turnover	Operating Profit to Turnover	Company Value	Capital Employed	Contract Completion	Forward Workload	Forward Margin	Share Price	Client Satisfaction	Total
	40	170	120	170	130	80	70	100	70	50	1,000
	52	179	142	177	140	108	66	94	74	80	1,112
	56	203	163	181	154	113	106	148	86	98	1,308
7	Early Year 2024 (Q3)	63	203	173	188	168	125	114	155	93	1,400
8	Early Year 2024 (Q4)	76	204	188	205	179	137	102	129	103	1,462

Information is available to through the **Assessing performance** option enable a detailed analysis of the **affect of previous decisions** in a number of key business areas, providing an aid for making effective decisions for the future.

The **Management Consultant Report** is covered separately, but we will take a brief look at the other **Analysis Tools** available.



Analysis Tools

Financial Performance

Management consultants report Graphical analysis

OPERATIONAL

SHAREHOLDERS

INVESTMENTS

Summary

Assets and liabilities

Per	Status	Year/qtr	Job performance				Company performance				Shareholders		Future outlook		
			Total value	Total cost	Gross profit	GP % cost	Overhead costs	OVH % of cost	Net operating profit	NOP % cost	Share price	Dividend % cost	Company value	Forward workload	Forward margin
1	History	2023 (Q1)	0	0	0		34,080		-30,580		0.93		4,844,420	0	0
2	History	2023 (Q2)	0	0	0		84,000		-80,522		1.06		4,646,054	21,681,700	937,916
3	History	2023 (Q3)	7,880,711	7,402,859	477,852	6.5 %	169,720	2.3 %	237,934	3.2 %	1.05	1.4 %	4,754,218	20,973,480	903,198
4	History	2023 (Q4)	12,720,600	12,293,440	427,161	3.5 %	155,000	1.3 %	213,947	1.7 %	1.04	0.9 %	4,852,965	20,831,500	905,458
5	Early Years	2024 (Q1)	13,025,620	12,384,630	640,992	5.2 %	231,070	1.9 %	314,339	2.5 %	1.10	0.8 %	5,050,498	19,539,940	853,289
6	Early Years	2024 (Q2)	9,640,023	8,925,667	714,356	8.0 %	309,010	3.5 %	312,912	3.5 %	1.28	1.8 %	5,181,108	31,411,770	1,343,681
7	Early Years	2024 (Q3)	14,262,650	13,523,850	738,800	5.5 %	236,670	1.8 %	391,899	2.9 %	1.38	1.4 %	5,365,893	33,817,530	1,399,489
8	Early Years	2024 (Q4)	20,819,720	19,725,490	1,094,224	5.5 %	247,720	1.3 %	656,926	3.3 %	1.53	0.7 %	5,865,802	30,317,150	1,170,757

PERIOD 8

CLICK ON A LINE IN THE THE SUMMARY ABOVE TO SHOW THE PERIOD DETAILS

JOB PERFORMANCE

Measured value:	20,921,750	?
Early completion bonus:	58,168	?
(less) Retention held:	248,400	?
Retention repaid:	88,201	?
Total value:	20,819,720	
(less) Costs:	19,725,490	?
Gross profit:	1,094,224	(5.5 % of job costs)

COMPANY PERFORMANCE

(less) Overheads:	247,720	?	(1.3 % of job costs)
Gross operating profit:	846,504		
(less) Corporation tax:	185,534	?	
(plus) Credit interest:	0		
(less) Overdraft interest:	4,044	?	
Net operating profit:	656,926		(3.3 % of job costs)

FUTURE OUTLOOK

Forward workload:	30,317,150	?
Forward margin:	1,170,757	

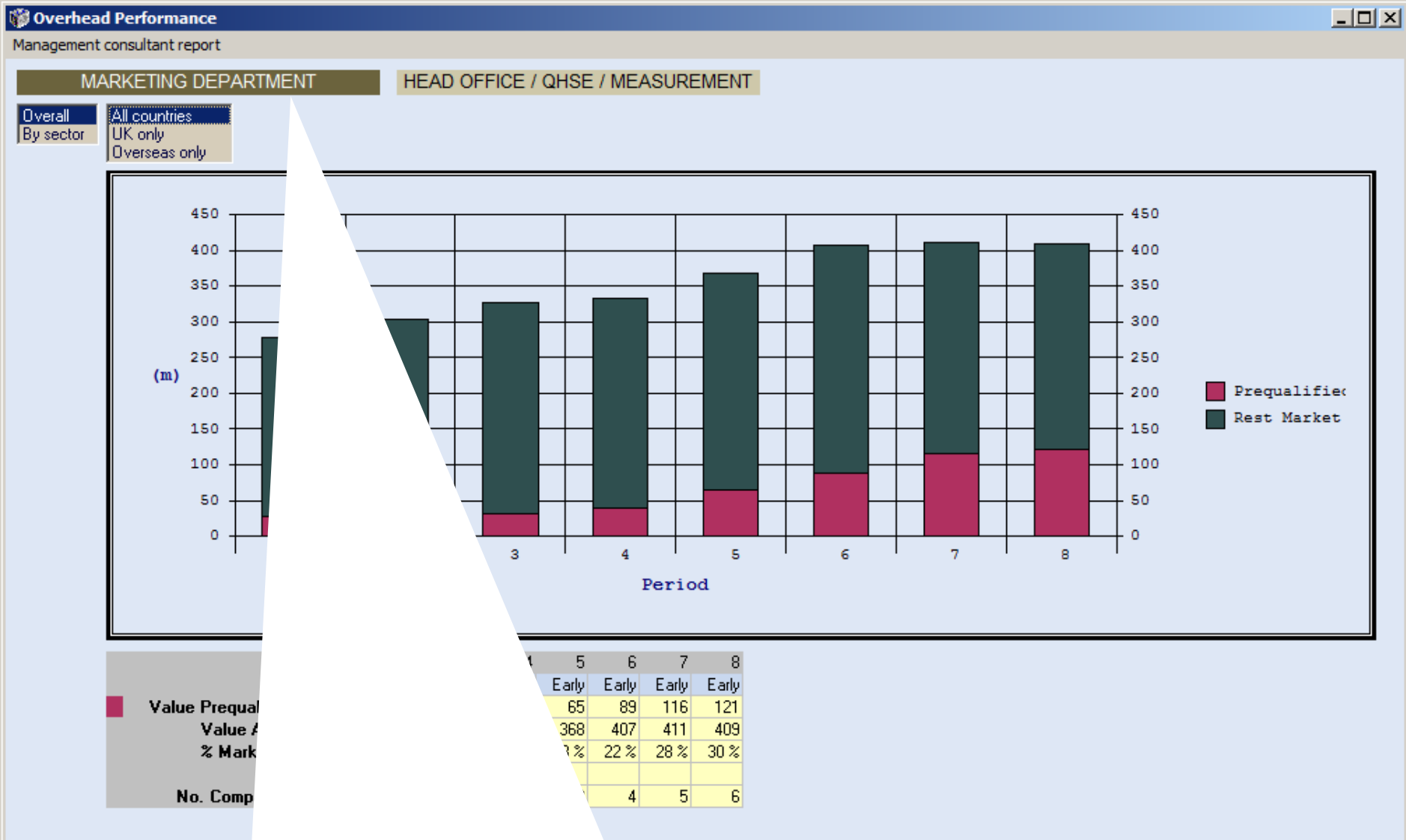
FINANCIAL PERFORMANCE

Detailed information is displayed relating to the past operational, shareholder and investment performance of the company.

A ? indicates that more detailed information is available about how a figure was arrived at.



Analysis Tools



OVERHEAD PERFORMANCE

Detailed information is displayed about the past performance of the marketing, head office, QHSE and measurement departments.



Analysis Tools

Procurement performance
Management consultant report

PREVIOUS BIDS **RIVAL BIDS**

Procurement Restrictions

NUMBER OF JOBS IN PROGRESS		VALUE OF WORK IN PROGRESS	
At the start of the period, the number of jobs in progress is:	6 (job progression screen)	The initial forward workload is:	28,047,780 (job progression screen)
The number of jobs in progress at the end of the period cannot exceed:	10 jobs	The current value of the capital base is:	4,844,286 (financial decision screen)
Hence, the maximum number of jobs that can be won is:	4 jobs during bidding	The current capital base can support forward workload of:	48,442,860 (10 x capital base)
		Hence, the value of work that can be won cannot exceed:	20,395,080 during bidding

Full Tender Report

Job details				Bid details			
Period	Job	Country	Client	Bid submitted	Won	Comment	Cumulative forward workload
8	167	United States	First Wind USA	11,294,590	Yes	Won on price	39,342,370
8	171	Mexico	Commercial FIFA North America 2026	11,729,300	No	Capital base limits workload	39,342,370
8	181	United Kingdom	London Water Services	5,871,020	Yes	Won on price	45,213,380

Display details for job 167
Tender report for job 167

PROCUREMENT PERFORMANCE

Detailed information is available about the company's previous bids, along with the history of their rivals' bids.



Analysis Tools

Job performance

Management consultant report Graphical analysis

ALL JOBS IDENTIFIED

JOBS WON

Summary

Risk analysis (Cost)

Risk analysis (Delays)

Retention analysis

TERMINOLOGY

[Completion Ratio] Measure of how efficiently a job is completed in its final period based upon the labour allocated (0=worse possible; 1 is perfect)

Job	In	Type	Size	Sector	Client	Status	Completion details			Progress details			
							In period	Schedule	Ratio	Periods Run	Cost incurred	Profit made	Profit % of cost
4	UK	DB	Medium	Building & Commercial	Madison B...	Completed early	4	Early	0.97	2	9,185,998	686,861	7.5 %
5	UK	BO	Small	Transport	East Midle...	Completed on time	4	On Time	0.96	2	2,099,767	67,147	3.2 %
29	UK	BO	Small	Transport	HS Rail f...	Completed late	6	Late	0.37	3	1,332,505	-27,741	-2.1 %
32	US	BO	Small	Building & Commercial	FIFA No...	Completed on time	5	On Time	0.96	2	5,768,797	36,079	0.6 %
34	UK	BO	Small	Energy	Breeze...	Completed on time	6	On Time	0.94	3	5,240,331	210,539	4.0 %
49	UK	BO	Small	Water & Sewage	Englis...	Completed on time	6	On Time	0.98	2	1,624,010	72,299	4.5 %
52	UK	BO	Medium	Transport	HS F...	Completed on time	7	On Time	0.93	3	7,310,838	422,006	5.8 %
67	SYR	BO	Small	Energy	Syr...	Completed on time	7	On Time	0.81	3	2,592,765	98,570	3.8 %
75	UK	BO	Small	Water & Sewage	Fe...	Completed late	8	Late	0.37	3	4,979,173	40,220	0.8 %
82	IRQ	DB	Medium	Building & Commercial	Ir...	Completed on time	8	On Time	0.92	3	9,520,311	458,609	4.8 %
110	UAE	BO	Medium	Energy	...	In progress				2	8,716,389	732,417	8.4 %
118	UK	BO	Medium	Building & Commercial	...	In progress				2	4,244,370	282,480	6.7 %
128	UK	BO	Small	Water & Sewage	...	Completed on time	8	On Time	0.96	2	2,096,243	76,554	3.7 %
137	UK	BO	Medium	Water & Sewage	...	In progress				1	3,104,954	-51,329	-1.7 %
167	US	BO	Medium	Energy	...	In progress							
181	UK	BO	Small	In progress							

JOB PERFORMANCE

Provides detailed information about the jobs the company have identified and won, along with a detailed risk and retention analysis for all jobs won.

The jobs identified can be filtered in a number of ways.



Analysis Tools

Jobs Won Analysis

% markup in the bid % mark up entered in the bid
 % profit actually made % profit made on the job to date

% markup in the bid
 % profit actually made
 Actual profit made
 Ineffective labour used
 Own labour used
 Subcontract labour used
 Risk contingency bid
 Risk contingency cure
 Risk cost incurred
 Risk incurred measure
 Project manager salary
 Completion schedule
 Completion ratio
 Completion bonus/penalty

Up to 5 parameters allowed

Job	% markup in the bid	% profit actually made
16	3.8%	6.3%
31	4.2%	1.5%
36	3.5%	-0.1%
53	3.8%	4.5%
74	4.0%	6.3%
77	3.7%	5.3%
101	3.5%	6.6%
133	3.7%	4.9%
162	3.8%	0%
164	3.5%	0%
167	3.8%	0%
184	3.3%	0%

	31	36	53	74	77	101
	UK	FRA	IND	FRA	UK	UK
Completed early	Completed early	Completed on time	Completed early	Completed early	Completed early	In progress
In period 5	In period 5	In period 5	In period 6	In period 7	In period 8	After 2 periods
4.2%	3.5%	3.8%	4.0%	3.7%	3.5%	
1.5%	-0.1%	4.5%	6.3%	5.3%	6.6%	

For all jobs won a graphical comparison of selected business parameters can be displayed for analysis.



Analysis Tools

Job 82 (Completed on time)
Management consultants report Risk analysis

JOB SUMMARY **JOB PROGRESS**

Job progression											Profit analysis			
Planned schedule			Actual progress								By period		Cumulative	
Job period	Planned labour	Cumul % complete	Period	Status	Actual labour	Ineffect due to delays	Ineffect due to overman	Effective labour	Actual % complete	Completion status	Profit	Profit % of cost	Cumul profit	Cumul profit % of cost
1	55	30 %	6	Past	56	0.0	0.0	56.0	31.07 %	Ahead of schedule	126,732	4.3 %	126,732	4.3 %
2	92	80 %	7	Past	93	0.0	0.0	90.9	81.63 %	Ahead of schedule	260,340	5.4 %	387,072	5.0 %
3	37	100 %	8	Past	36	0.0	0.0	36.0	100 %	Completed on time	71,537	4.1 %	458,609	4.8 %

Total planned labour needed to complete the job is 184.

PERIOD 8 **CLICK ON A LINK TO VIEW THE SUMMARY ABOVE TO SHOW THE DETAILS FOR EACH PERIOD THE JOB HAS BEEN PROGRESSED**

LABOUR ANALYSIS	COST ANALYSIS	VALUE AND PROFIT ANALYSIS
PLANNED SCHEDULE Required labour: 37 Overmanning of: 35 % permitted Effective labour limit (ELL): 50.0	BUILD RELATED Design cost: 133,249 ? Build cost: 1,305,080 ? Site cost: 287,530 ? Risk cost: 0 Late completion penalty: 0	Measured value: 1,833,306 ? Early completion bonus: 0 Total value: 1,833,306 Total cost: 1,761,769 Total profit: 71,537 (4.1 % of costs)
LABOUR ALLOCATED Own: 36 Sub: 0 Total labour allocated: 36 ? (less) labour lost by delays: 0 (ineffective) Effective level after delays: 36.0 (less) overmanning above the ELL: 0 (ineffective) Effective labour on site: 36	PERSONAL LABOUR COSTS Labour due to overmanning: 0 Labour due to completing the job: 15,390 ? Training new recruits (Own): 0 Labour payoffs (Own): 0 Subcontractor cost: 0	PROGRESS TO DATE Amount of the job completed: 100 % Progress comment: (On schedule) Cumulative profit: 458,609 (4.8 % of costs) Completion ratio: 0.924
	PROJECT MANAGER Allocated: Dwane Dupont ? Overall performance: very good Salary: 14,250 Bonus: 570 (4 %) Recruitment cost: 5,700 Relocation fee: 0 Previous payoff: 0	

Displaying job details provides detailed information relevant to a particular job, including a job summary and job progress period by period.



Analysis Tools

Client History

Client information Gradings

SUMMARY **DETAIL**

All clients
Where jobs have been won

Client	Country	Current relationship	Tendering details		Jobs won details			Jobs completed details				
			No. jobs identified	No. jobs bid for	No. jobs won	Value of work won	% of total	No. jobs	Early	On time	Late	Markup % cost
Breeze Energy	UK	satisfactory	1	1	1	5,450,870	5.4 %	1	0	1	0	4.0 %
Dales Water Services	UK	satisfactory	1	1	1	2,172,797	2.1 %	1	0	1	0	3.7 %
East Midlands County Council	UK	satisfactory	1	1	1	2,166,914	2.1 %	1	0	1	0	3.2 %
Emirates Energy	UAE	satisfactory	1	1	1	11,584,980	11.4 %					
English Waterways	UK	satisfactory	3	1	1	1,696,309	1.7 %	1	0	1	0	4.5 %
Fenlands County Council	UK	satisfactory		2	1	5,019,393	4.9 %	1	0	0	1	0.8 %
FIFA North America 2026	US	fairly good		2	1	5,804,876	5.7 %	1	0	1	0	0.6 %
First Wind USA	US	satisfactory		1	1	11,294,590	11.1 %					
HS Rail Connection Group	UK	satisfactory		4	2	9,037,608	8.9 %	2	0	1	1	4.6 %
Iraq TranGen 2009	IRQ	fairly good			1	9,978,920	9.8 %	1	0	1	0	4.8 %
London Water Services	UK	satisfactory			1	5,871,020	5.8 %					
Madison Bank	UK	fairly good			1	9,823,740	9.7 %	1	1	0	0	7.5 %
Master Brewers UK	UK	satisfactory			1	7,957,390	7.8 %					
Syrian Pipelines	SYR	satisfactory				2,691,335	2.7 %	1	0	1	0	3.8 %
The Environment Department	UK	satisfactory				10,863,340	10.7 %					

CLIENT HISTORY

Provides a summary and detailed information about the relationships formed with clients.



Analysis Tools

Project Manager History																
Gradings Help																
Name	Where used							Improvement factors				Deterioration factors				
	Base	Per	Status	Job	In	Sector	BIM	Basic grading	Affect of time with the company	%	Expectation level	Affect of bonus payment	Affect of job location	Affect of taking over from another	Overall grading	Reason for leaving
Brad Mcgrath	AUS	5	On Job	53	IND	Building & Commercial	Yes	very good	none	4 %	Still at History Level	reasonable	reasonable	none	very good	
		6	On Job	53	IND	Building & Commercial	Yes	very good	marginal	4 %	Above History Level	small	reasonable	none	very good	
		7	On Job	101	UK	Energy	No	very good	small	4 %	Above History Level	small	reasonable	none	very good	
		8	On Job	101	UK	Energy	No	very good	reasonable	4 %	Above History Level	small	reasonable	none	excellent	
Doug Fordham	UK	4	On Job	31	UK	Transport	No	above avg	none	3 %	History Level	small	none	none	good	
		5	On Job	31	UK	Transport	No	above avg	marginal	3 %	Still at History Level	small	none	none	good	
Dwane Dupont	US	8	On Job	133	FRA	Building & Commercial	No	very good	none	4 %	Above History Level	small	reasonable	none	very good	
Gordon Simcoe	UK	3	On Job	2	FRA	Building & Commercial	Yes	very good	none	4 %	History Level	reasonable	reasonable	none	very good	
		4	On Job	2	FRA	Building & Commercial	Yes	very good	marginal	4 %	History Level	reasonable	reasonable	none	excellent	
		5	On Job	2	FRA	Building & Commercial	Yes	very good	small	4 %	Still at History Level	reasonable	reasonable	none	excellent	
		6	On Job	74	FRA	Building & Commercial	Yes	very good	reasonable	4 %	Above History Level	small	reasonable	none	excellent	
		7	On Job	74	FRA	Building & Commercial	Yes	very good	reasonable	4 %	Above History Level	small	reasonable	none	excellent	
Sid Arkle	UK	6	On Job	77	UK	Building & Commercial	Yes	excellent	none	5 %	Above History Level	small	none	none	excellent	
		7	On Job	77	UK	Building & Commercial	Yes	excellent	marginal	5 %	Above History Level	small	none	none	excellent	Poached
Steve Bull	UK	4	On Job	36	FRA	Transport	No	excellent	none	5 %	History Level	noticeable	reasonable	none	excellent	
		5	On Job	36	FRA	Transport	No	excellent	marginal	5 %	Still at History Level	noticeable	reasonable	none	excellent	

BRAD MCGRATH

Age: 35

Salary: 55,000 per annum

Qualifications: Masters of Engineering, MIEAust



PROJECT MANAGER HISTORY

Provides detailed information about the project managers used by the company.



Analysis Tools

Consultant History

Gradings


Name	Job details						Factors affecting build costs			
	Base	Job	Country	Status	Sector	BIM being used	Expertise in sector	BIM experience	Location	% change so far
Queensland Associates	AUS	162	United Kingdom	1st period	Water & Sewage	No	noticeably reduces	n/a	slightly increases	
The PW Partnership	UK	2	France	Completed	Building & Commercial	Yes	noticeably reduces	noticeably reduces	slightly increases	-0.5 %
		53	India	Completed	Building & Commercial	Yes	noticeably reduces	noticeably reduces	slightly increases	-0.5 %
		74	France	Completed	Building & Commercial	Yes	noticeably reduces	noticeably reduces	slightly increases	-0.5 %

QUEENSLAND ASSOCIATES

Profile: Queensland Associates owes its long and rich history to its founder, Ritchie Wooragal, over 30 years ago, and has since grown in both size and stature, and today operates out of multiple offices across Australia, with its Head Office in Gold Coast.

Queensland Associates have always moved with the times, and the company's designers can draw upon the latest technological and environmental advancements to deliver solutions for their clients that leave a legacy for future generations, and they operate in all sectors of the construction industry, both within Australia and globally.

BIM experience: significant



CONSULTANT HISTORY

Provides detailed information about the design consultants used by the company on design and build jobs.



Analysis Tools



Analysis Tools