

# Mopex Consulting

## Project Management Framework



Operational Excellence, made measurable

**Mopex Consulting Ltd**

Operational Excellence, made measurable

## Mopex Project Management & PMO



Deliver structured, transparent, and value-driven project execution using Mopex’s branded methodology—anchored in planning, control, and stakeholder alignment.

# Project Planning

## Mopex Benefits Tracker & ROI Calculator Template

**Benefits Tracker**

Benefit ID	Description	Type	Owner	Target Value	Actual Value	Status	Realisation Date	Linked Items	Notes
EN-001	Reduced processing time	Efficiency	Ops Lead	30% reduction	22% reduction	In Progress	—	MS-001, DEC-001	Automation phase underway
EN-002	Improved audit readiness	Compliance	Compliance Lead	Full certification	Partial readiness	Delayed	—	MS-002, ISS-002	Awaiting client feedback

**ROI Calculator**

IOI ID	Initiative	Owner	Investment (£)	Realised Benefit (£)	ROI (%)	Payback Period (months)	BCR	Status
IOI-001	Automation rollout	Ops Lead	£ 25,000.00	£ 38,000.00	52%	6.6	1.52	In Progress
IOI-002	QMS certification	Compliance Lead	£ 18,000.00	£ 12,000.00	-33%	18	0.67	At Risk
IOI-003	UX redesign	PM	£ 10,000.00	£ 8,500.00	-15%	11.8	0.85	Delayed

**Benefits & ROI Dashboard**

KPI Panel:  
 Benefits Tracked  
 & Realised vs At Risk  
 Avg ROI  
 Avg Payb  
 Avg BCR  
 Averages  
 Benefits  
 ROI Distr  
 Averages

## Mopex Project Pipeline Tracker Template

**Project Pipeline Tracker**

Project ID	Client	Framework	Start Date	Status	Assigned Lead	Readiness Score	Proposal Stage	Pricing Model	Notes / Updates
PRJ-001	Acme Corp	DMAIC	14/10/2025	Proposal Sent	Ops Consultant	60%	Awaiting Approval	Fixed Fee	Proposal sent 2-Oct
PRJ-002	BioMed Ltd	QMS	21/10/2025	Kickoff Scheduled	QMS Lead	90%	Approved	Day Rate	Kickoff pack ready
PRJ-003	GreenTech	LEAN	28/10/2025	Awaiting Client Input	LEAN Coach	40%	Drafting	ROI-Based	Pricing model under review
PRJ-004	SafeBuild	H&S	04/11/2025	Proposal Sent	H&S Consultant	70%	Awaiting Approval	Fixed Fee	SME availability confirmed
PRJ-005	FinEdge	PMO	11/11/2025	Kickoff Scheduled	PMO Lead	100%	Approved	Day Rate	Onboarding checklist complete

**Pipeline Dashboard**

KPI Panel: # projects in pipeline, % approved, avg readiness score, top 3 frameworks in demand  
 Bar Chart: Projects by framework  
 Trend Chart: Pipeline growth over time  
 Heatmap: Readiness vs Proposal Stage  
 Slicers: Filter by client, framework, lead, status

## Mopex Budget Tracker Template

**Budget Tracker**

Cost ID	Category	Description	Budget (£)	Actual (£)	Variance
COST-001	Software	Annual license for analytics platform	£ 3,000.00	£ 2,800.00	£
COST-002	Travel	Workshop travel & accommodation	£ 1,200.00	£ 1,450.00	-£
COST-003	Training	Lean Six Sigma Black Belt course	£ 2,500.00	£ 2,500.00	£

**Budget Dashboard**

KPI Panel: Total budget, total actual, % variance, % overspent items  
 Bar Chart: Spend by category  
 Pie Chart: Budget allocation  
 Trend Chart: Monthly spend vs budget  
 Slicers: Filter by owner, category, phase, status

## Mopex Stakeholder Map Template

**Stakeholder Map**

Stakeholder ID	Name / Role	Department / Function	Influence	Interest	Engagement Level	Communication Needs	Preferred Channel	RACI Role	Notes
TK-001	Client Sponsor	Executive	High	High	Active	Weekly updates, strategic alignment	Email / Steering Committee	A	Key decision-maker
TK-002	Project Lead	Delivery	High	High	Active	Daily stand-ups, issue resolution	Teams / PM Tool	R	Owens delivery
TK-003	SME / Analyst	Technical	Medium	High	Consulted	Data inputs, validation	Email / Workshops	C	Supports ROI model
TK-004	QA / Compliance	Governance	Medium	Medium	Informed	Compliance checkpoints	Email / Review Pack	I	Ensures audit trail
TK-005	End User Rep	Operations	Low	High	Consulted	Usability feedback	Surveys / Interviews	C	Voice of the user
TK-006	External Auditor	Regulatory	High	Low	Informed	Final review, documentation	Email / Portal	I	Certification readiness

**Stakeholder Dashboard**

KPI Panel: # stakeholders mapped, % active engagement, % high influence/high interest, top 3 communication risks  
 Heatmap: Influence vs Interest matrix  
 Bubble Chart: Stakeholder density by department and role  
 Trend Chart: Engagement level over time  
 Slicers: Filter by stakeholder, role, influence, interest, communication channel

Task	Status	Owner	Progress	Start Date	End Date	Priority
Submit design to leadership for approval	On Track	Nick Mason	Complete	16/05/2025	16/05/2025	1
Make any amendments required by leadership	On Track	Nick Mason	Complete	19/05/2025	23/05/2025	5
Populate H & S Documents	Milestone			30/06/2025		
Create a shared folder	On Track	Nick Mason	Complete	23/05/2025	23/05/2025	1
Populate all documents on file	On Track	Nick Mason	Complete	26/05/2025	05/06/2025	
Create document registers	On Track	Nick Mason	Complete	05/06/2025	06/06/2025	
Format documents in line with current forms	Low Risk	Nick Mason	In Progress	09/06/2025	20/06/2025	
Build Management System	Milestone			31/07/2025		
Add documents to the system	Goal	Nick Mason	Not Started	20/06/2025	30/06/2025	7
Create links to the new dashboard	Goal	Nick Mason	Not Started	01/07/2025	12/07/2025	9
Complete final checks	Goal	Nick Mason	Not Started	14/07/2025	18/07/2025	5
Handover to the leadership	Goal	Nick Mason	Not Started	21/07/2025	29/07/2025	7

## Mopex Project Management Framework

**Purpose:** Deliver structured, transparent, and value-driven project execution using Mopex’s branded methodology—anchored in planning, control, and stakeholder alignment.

Use Cases	Service Description
Operational Excellence and Compliance Projects QMS, H&S, and ESG Implementations Lean Six Sigma and Data Transformation Initiatives Client onboarding, scoping, and delivery tracking Fixed-fee and milestone-based engagements	<ul style="list-style-type: none"> <li>◊ <b>Phase 1. Initiation and Scoping</b> Purpose: Define the opportunity, scope, and success metrics.</li> <li>◊ <b>Phase 2. Planning</b> Purpose: Build the plan, align resources, and set governance.</li> <li>◊ <b>Phase 3. Execution</b> Purpose: Deliver workstreams, track progress, and manage risks.</li> <li>◊ <b>Phase 4. Monitoring and Control</b> Purpose: Ensure systems are working and sustained.</li> <li>◊ <b>Phase 5. Closure and Handover</b> Purpose: Wrap up, capture lessons, and transition ownership.</li> </ul>

### Mopex Project Management Toolkit (Suggested Assets)

Asset	Format	Purpose
Project Charter Template	Word/Excel	Define scope and objectives
RACI & Stakeholder Map	Excel	Clarify roles and engagement
Gantt & WBS Planner	Excel/PowerPoint	Structure timeline and tasks
RAID & Risk Register	Excel	Track risks and decisions
Status Report Template	Word/Excel	Communicate progress
KPI & Budget Dashboard	Excel/Power BI	Monitor performance and spend
Final Report-Out Deck	PowerPoint	Present results and close-out
Handover & Sustainment Pack	Word/Excel	Transfer ownership and governance

# Project Tracking Documents linked to Dashboard

**Project Reporting Dashboard**

Company Name: ABC Baking Company  
Project Name: Muffin Baking Process

Cost Budget: £ 35,334.00 | Curr. Cost: £14,677.20  
Curr. Days: 27 | Curr. Hrs: 216:00:00

Project Duration: 02/06/2025 - 29/08/2025  
Total Weeks: 13  
Total Hrs: 520:00:00  
Wks. Comp.: 5  
Hrs. Comp.: 216:00:00  
Balance: 304:00:00

Issues: 3 | Risks: 3

Project Status: 42% (Donut Chart)

Task Status: Complete (10), In Progress (1), Not Started (1)

# of Tasks: 15  
Complete Tasks: 10  
In Progress: 1  
Tasks ON HOLD: 1  
Tasks Overdue: 0

**Mopex H&S Project Overview**

Benefits & ROI Summary:  
Total Forecasted Benefit (£): £15,000.00  
Total Realised Benefit (£): £0.00  
Net ROI (£): £3,600.00

Project Status: 10% (Donut Chart)

# of Tasks: 25  
Complete Tasks: 2  
In Progress: 1  
Tasks ON HOLD: 1

Metric Status: 0% (Gauge Chart)

**Project Tracking Dashboard**

Projects: 15

Effort: 5400  
Effort Completed: 298  
Effort Remaining: 5102

Project	Project Manager	Start Date	End Date	Duration	Progress %	Task Count
Project AA	Bill Bingham	01/09/2025	11/09/2025	9	100%	6
Project BB	Richard Sheldon	16/09/2025	01/10/2025	12	44%	9
Project CC	Brian Dixon	12/08/2025	11/01/2026	107	12%	26
Project DD	Chris Mason	13/09/2025	10/02/2026	107	0%	31
Project FF	Andrew Loundes	26/09/2025	10/10/2025	11	0%	5
Project HH	Charlie Grey	11/10/2025	25/11/2025	32	60%	8
Project JJ	Gary Melbourne	26/10/2025	21/12/2025	40	0%	20
Project KK	Carol Day	10/11/2025	10/12/2025	23	0%	15
Project LL	Hywel Davies	18/10/2025	09/11/2025	15	0%	4
Project MM	Peter Bone	22/08/2025	29/01/2026	115	29%	62
Project NN	Charlie Grey	01/10/2025	05/12/2025	48	7%	14
Project OO	Gary Melbourne	20/11/2025	26/01/2026	48	0%	13
Project PP	Carol Day	10/12/2025	24/12/2025	11	0%	4
Project QQ	Chris Mason	20/12/2025	23/12/2025	2	0%	2
Total				93	0%	37

Projects by Progress: Complete (1), In Progress (5), Not Started (9)

Effort by Project: Bar chart showing effort distribution across projects.

Projects by PM: Pie chart showing effort distribution by project manager.

Timeline: Gantt chart showing project durations from 30/06/2025 to 07/03/2026.

# Some PM Project Tools

## Mopex Communication Plan Template

**Communication Plan**

Comm ID	Audience	Purpose	Frequency	Channel	Owner	Format	RACI Rol	Notes
COM-001	Project Team	Daily updates, task alignment	Daily	Teams / PM Tool	Project Lead	Summary + Action Items	R	Logged via stand-up tracker
COM-002	Steering Committee	Strategic decisions, risk review	Bi-weekly	Live Meeting + Pack	PMO	Slide Deck + KPI Dashboard	A	Includes Risk Register feed
COM-003	Client Sponsor	Milestone review, ROI tracking	Monthly	Email + Dashboard	PM	Executive Summary	A	Anchored to pricing calculator
COM-004	External Auditor	Compliance updates	Monthly	Email / Portal	Compliance Lead	Formal Report	I	Linked to QMS & H&S framework
COM-005	End Users	Awareness, training	Pre/Post-launch	Email / LMS	Training Lead	Guides + Videos	C	Tied to SOP rollout

## Mopex Decision Log Template

**Decision Log**

Decision ID	Description	Date	Decision Maker	Impact	Status	Rationale	Follow-Up Actions	Linked Items	Notes
EC-001	Proceed with Phase 2	25/09/2025	Steering Committee	High	Approved	Phase 1 completed successfully	Mobilise resources for Phase 2	WSR-001, STK-001	Budget reallocation required
EC-002	Re-baseline project timeline	27/09/2025	PM	Medium	Approved	Resource constraints flagged	Update Gantt and notify stakeholders	ISS-002, STK-002	Impacts milestone tracking
EC-003	Include QMS audit in scope	28/09/2025	Compliance Lead	High	Approved	Certification readiness priority	Add to Governance Tracker	STK-004, ISS-002	Align with external auditor

## Mopex Daily Log Template

**Daily Log**

Date	Area	Activity / Observation	Status	Owner	Evidence / Notes	Follow-Up Required
30/09/2025	QMS	Reviewed Document Control SOP	Completed	QMS Lead	SOP v2.3 reviewed	No
30/09/2025	H&S	Site inspection - PPE compliance	Issue Found	H&S Manager	Missing gloves in Zone B	Yes - escalate to site lead
30/09/2025	Project Delivery	Stage Gate 2 review	Completed	PMO	Checklist signed off	No

## Mopex Milestone Tracker Template

**Milestone Tracker**

Milestone ID	Description	Target Date	Owner	Status	Completion Date	RAG Status	Dependencies	Linked Items	Notes
MS-001	Finalise Phase 1 Deliverables	20/09/2025	Delivery Lead	Completed	19/09/2025	Green	ISS-001	WSR-001, DEC-001	All outputs signed off
MS-002	Client Feedback on QMS Draft	25/09/2025	Compliance Lead	Delayed	-	Red	STK-001, ISS-002	DEC-002	Awaiting sponsor input
MS-003	Kickoff Phase 2	30/09/2025	PM	On Track	-	Amber	MS-001, DEC-001	STK-002	Resource allocation pending

## Mopex Project Chart

**Mopex Project Chart**

Company Name: ABC Baking Company  
 Project Name: Muffin Baking Process  
 Today's Date: 09/12/2025  
 Project End Date: 31/07/2025  
 Days (Net): 30  
 Scrolling Increment: 0

Task Description	Category	Assigned to	Status	Progress	Start	End	Days
Initial Internal Audit	Milestone	Nick Mason	Complete	100%	09/05/2025	08/05/2025	9
Complete audit of all units	On Track	Nick Mason	Complete	100%	02/06/2025	08/05/2025	9
Submit Internal Audit Report	On Track	Nick Mason	Complete	100%	08/05/2025	09/05/2025	2
Feedback from audit	On Track	Leadership	Complete	100%	09/05/2025	09/05/2025	1
Design Management System	Milestone	Nick Mason	Complete	100%	30/05/2025	30/05/2025	1
Design system framework	On Track	Nick Mason	Complete	100%	08/05/2025	09/05/2025	2
Design a system dashboard	On Track	Nick Mason	Complete	100%	12/05/2025	16/05/2025	5
Submit design to leadership for approval	On Track	Nick Mason	Complete	100%	16/05/2025	16/05/2025	1
Make any amendments required by leadership	On Track	Nick Mason	Complete	100%	19/05/2025	23/05/2025	5
Populate H & S Documents	Milestone	Nick Mason	Complete	100%	30/06/2025	30/06/2025	1
Create a shared folder	On Track	Nick Mason	Complete	100%	23/05/2025	23/05/2025	1
Populate all documents on file	On Track	Nick Mason	Complete	100%	26/05/2025	05/06/2025	9
Create document registers	On Track	Nick Mason	Complete	100%	05/06/2025	06/06/2025	2
Format documents in line with current forms	Low Risk	Nick Mason	In Progress	40%	09/06/2025	20/06/2025	10
Build Management System	Milestone	Nick Mason	In Progress	40%	31/07/2025	31/07/2025	1

## Mopex ROI Tracker Template

**ROI Tracker**

ROI ID	Initiative	Owner	Investment (£)	Realised Benefit (£)	ROI (%)	Status	Realisation Date	Linked Items	Notes
ROI-001	Automation rollout	Ops Lead	£ 25,000.00	£ 38,000.00	52%	In Progress	-	BEN-001, MS-001	Phase 2 underway
ROI-002	QMS certification	Compliance Lead	£ 18,000.00	£ 12,000.00	-33%	At Risk	-	BEN-002, ISS-002	Awaiting client feedback
ROI-003	UX redesign	PM	£ 10,000.00	£ 8,500.00	-15%	Delayed	-	BEN-003, STK-005	Feedback loop initiated

## Mopex Work Breakdown Structure (WBS) Template

**WBS Register**

WBS ID	Phase / Deliverable	Task Description	Subtasks	Owner	Duration	Dependency	Status	Comments
WBS-001	Define	Problem Statement	Stakeholder interviews, data review	Project Lead	3 days	None	Blue	"Scoping complete"
WBS-002	Measure	Baseline Metrics	Data collection, dashboard setup	Analyst	5 days	WBS-001	Orange	"Awaiting data access"
WBS-003	Analyse	Root Cause Analysis	Fishbone, 5 Whys, Pareto	SME	4 days	WBS-002	Blue	"Analysis underway"
WBS-004	Improve	Solution Design	Workshops, pilot planning	Project Lead	6 days	WBS-003	Red	"Pilot delayed"
WBS-005	Control	SOP Finalisation	SOP drafting, training pack	QA Lead	4 days	WBS-004	Green	"SOPs signed off"

**WBS Dashboard**

Phase	Backlog	In Progress	Blocked	Complete
Define	WBS-001			
Measure		WBS-002		
Analyse		WBS-003		
Improve			WBS-004	
Control				WBS-005

**PI Panel:** # tasks defined, % completed, avg task duration, top 3 blockers  
**Gantt Chart:** Timeline view of WBS phases and tasks  
**Canban Board:** Visual task flow by phase (Define, Measure, Analyse, Improve, Control)  
**Heatmap:** Task density by phase  
**Bubble Chart:** Task complexity vs duration  
**Filters:** Filter by phase, owner, status, dependencies