# [1. BENCHMARKING ASSOCIATES GUIDE (IR-BMM-2 v2)](https://www.construction-institute.org/benchmarking-associates-guide)

**Report Summary:** Benchmarking is the systematic process of measuring an organization’s performance against both its own internal project portfolio and industry peers to determine best practices that, when adapted and utilized, lead to superior performance by improving capital efficiency throughout the total project life cycle, including operations and maintenance.

The CII Performance Assessment Program measures project performance and monitors the use of CII Best Practices for both small and large capital projects and for small maintenance projects. Project metrics that are input into CII’s Data Warehouse (DW) system are calculated and assessed. The DW provides both quantitative and qualitative data for an inclusive deep dive into ways that project data can directly affect project performance across the organization. Once an organization’s project is entered into the DW, its performance can immediately be compared to similar projects in the industry. The DW is a world-class benchmarking and research platform that includes the following features:

* Project assessment and comparisons of a variety of metrics, such as cost, schedule, safety, changes, and rework
* Customized industry-specific benchmarking to enable enhanced, focused performance assessment
* The ability to assess a project’s performance, team dynamics, and organizational relationships during execution to identify real-time improvement opportunities via the 10-step benchmarking program.

The benchmarking process includes the following 10 steps:

1. Obtain organizational commitment to the benchmark as a basis for improvement.
2. Identify a Benchmarking Associate.
3. Attend the CII’s Data Warehouse training.
4. Identify project managers for benchmarking and improvement.
5. Determine levels of use; i.e., what should be benchmarked and to what extent?
6. Input project data during execution.
7. Finalize and submit a project questionnaire by phase or at project close-out.
8. Generate project and/or organization reports.
9. Repeat Steps 5 through 8 as part of a continuous improvement program.
10. Engage with the Data Analytics Community for Business Advancement.

**Key Takeaways:**

## (1) Obtain organizational commitment to benchmarking as a basis for improvement.

## (Project Phase: Prefeasibility through Turnover)

* Schedule meetings with executive leadership to discuss the importance of benchmarking and its alignment with business strategies.
* Develop a clear plan that outlines the goals, objectives, and expected outcomes of the benchmarking initiative.
* Communicate the benefits of benchmarking, such as identifying best practices and areas for improvement, to stakeholders across the organization.
* Ensure that all project managers understand their role in providing data and participating in the benchmarking process.
* Obtain a formal commitment from executive leadership to support the benchmarking initiative, and provide necessary resources.

## (2) Identify a person to be responsible for benchmarking coordination.

## (Project Phase: Prefeasibility through Turnover)

* Designate an individual to serve as the Benchmarking Associate, and provide that person with necessary training.
* Ensure that the Benchmarking Associate has access to relevant data and tools that are needed for effective benchmarking coordination.
* Communicate with the Benchmarking Associate regularly to ensure that they understand their role in supporting both upper management and project management.
* Provide guidance on ways to integrate benchmarking results into organizational decision-making.
* Monitor the Benchmarking Associate's progress and provide feedback to help them optimize their performance.

## (3) Ensure that the Benchmarking Associate learns the basics of the Construction Industry Institute’s benchmarking program.

## (Project Phase: Prefeasibility through Turnover)

* Schedule time for the Benchmarking Associate to attend 60- 90-minute Data Warehouse training.
* Have the Benchmarking Associate review learning objectives that cover data usage to improve projects, data submissions, and project performance metrics.
* Ensure that the Benchmarking Associate completes the mandatory prerequisite training for accessing the Data Warehouse portal.
* Verify the Benchmarking Associate’s comprehension of data usage in order to submit project details and assess project performance.

## (4) Identify project managers to be responsible for project benchmarking and improvement.

## (Project Phase: Prefeasibility through Turnover)

* Clearly explain to project managers that their role is crucial in providing accurate and complete data for benchmarking.
* Remove projects with incomplete or unreliable data to ensure high-quality submissions.
* Highlight the importance of continuous monitoring and evaluation of project performance during project execution.
* Explain the purpose of benchmarking to project managers, emphasizing that benchmarking is not a punitive exercise but rather an opportunity for improvement.

## (5) Determine levels of use in terms of the activities to benchmark and their quantity.

## (Project Phase: Prefeasibility through Turnover)

* Identify a diverse set of projects that represent typical work performed by the organization.
* Eliminate projects with incomplete or unreliable data to ensure accurate results.
* Select only an assortment of projects, not necessarily only the best performing ones, to set realistic benchmarks.
* Choose projects that are representative of the organization to provide a realistic benchmark of performance.
* Communicate clearly to project managers about the purpose and benefits of benchmarking.

## (6) Enter project data during project execution.

## (Project Phase: Prefeasibility through Turnover)

* Submit project data over time using the Integration Toolkit, or submit data after project closeout.
* Use an easy-to-use Excel-based input form to enter project data into the Data Warehouse format.
* Document the location of data obtained from internal project controls and construction management systems while inputting project data in the Integration Toolkit.
* Develop reports that extract data in the Data Warehouse format to facilitate analysis.

## (7) Finalize and submit the project questionnaire at project closeout or by phase.

## (Project Phase: Prefeasibility through Turnover)

* Review the project data online to ensure accuracy and completion.
* Complete the project questionnaire once a project phase is complete.
* Ensure that all required information has been submitted before submitting the project questionnaire.
* Submit the completed project questionnaire within the Data Warehouse.
* Validate and review the submitted project with the Construction Industry Institute benchmarking & metrics.

## (8) Generate a project and/or enterprise report.

## (Project Phase: Prefeasibility through Turnover)

* Obtain a Performance Assessment Key Report once all project data have been submitted.
* Using the metrics entered, analyze the project’s performance against that of hundreds of similar projects in the industry.
* Browse project performance across industries, project types, cost categories, practices, etc. via the Data Miner.

## (9) Repeat Nos. 5 through 8 as part of a continuous improvement program.

## (Project Phase: Prefeasibility through Turnover)

* Repeat benchmarking and project excellence by submitting other projects.
* Benchmark internally across the company against best-in-class company performance.
* Understand and commit to the efforts required to become successful and excellent in future projects.

## (10) Engage with the Data Analytics Community for Business Advancement (DA CBA) to stay abreast of benchmarking initiatives and industry trends.

## (Project Phase: Prefeasibility through Turnover)

* Check the DA CBA webpage on the Construction Industry Institute website for information about benchmarking initiatives.
* Review metrics scores for basic project controls, such as cost growth and schedule growth, to stay informed about performance benchmarks.
* Participate in discussions with other construction professionals through the DA CBA to share lessons learned and best practices.