

ENTC 4060 Project Scheduling Evaluation and Reporting

Purpose of Evaluation

- Assess performance
- Reveal areas of deviation from original scope &/or goals
- Snoop out potential problem areas
- Keep stakeholders informed

Why Track a Project?

Keep the following on target:

- Cost — Expenditures
- Time — Schedules
- Scope — Technical performance

Two Types of Evaluation

- Formative evaluation
 - Throughout project lifecycle
 - Provide information for corrective action
 - “What’s happening?” & “How’s progress?”
- Summary evaluation
 - After project completed
 - AKA “Lessons Learned”
 - “What happened and what resulted?”

Project Manager’s Duties

- Oversees work
- Coordinates corrective action as required
- Evaluates status
- Initiates communication
 - Up and down chain of command

Formative Evaluation

- Complex relationships among cost, time, & scope
- CT&S are always interrelated and draw from the same limited resource pool
- Cannot just look at one criteria

Goals of Evaluation

- Reveals problem areas
- Alerts personnel to *potential* problem areas
- Identifies opportunities to increase customer satisfaction by reducing costs, accelerating work, or enhancing project outcomes

Graphical Methods—Cons

- Hide or obscure information
 - Especially at work package level
- May lead to erroneous conclusions
- Don't reveal causes or solutions
- Potentially time consuming
 - Use computer-based tools

Project Reporting

- Four Methods of Reporting
 - Graphics (charts & tables)
 - Reports (oral & written)
 - Observations (MBW)
 - Review meetings

Reports — Oral

- Quick & easy to obtain
- Quality depends upon communication skills of presenter
 - Both interpretative and verbal
- Subject to loss of information if not followed up by other, more permanent, methods

Graphical Methods—Pros

- Most efficient
 - Consolidate large amounts of data into easily understood information
- Clarify project progress, performance, & projections
- Distribute &/or display

Reports — Written

- Valuable but quality and usefulness varies
- Summary format is best
 - Incorporate graphics & ratios (percentages)
- Time consuming to prepare
- During planning phase, schedule key reports as milestones and allow for preparation

Direct Observation

- “Management By Walking”
 - Get out of the office & do it often!
- Limit distortion and filtering due to natural “spin” from senders to receivers
- Maintain worker’s importance and ownership in project

Formal Review Meetings

- Four common
 - Preliminary Design Review
 - Critical Design Review
 - Functional Readiness
 - Deliverable Readiness & Fitness

Project Review Meetings

- Goal is to identify
 - (a) project plan deviations &
 - (b) corrective actions
- Focus on
 - Current & anticipated CS&T problems
 - Potential methods of resolution
 - Improvement opportunities
- Formal vs. Informal Reviews

Informal Meetings

- “Peer Reviews”
 - Often just project team members, critical vendors and customer reps.
- Hold frequently and regularly
- Limit size to involved phase participants
- Update status and prepare presentations

Formal Reviews

- Formal review meetings
 - Must be planned and scheduled for particular project phases (critical stages & project milestones)
- Project team accumulates & formats data
- May require considerable preparation and outside experts &/or scrutiny
- Review period may last for days or weeks

Informal Meetings

- Goals:
 1. Uncover problems & emerging issues
 2. Suggest corrective action
- Expect problems
 - Avoid “finger pointing” and assigning blame
- PM functions as group facilitator and encourages honesty & candor

POA Pow-Wows

- POA work sheet
 - POA—Planned, Organized, Actual
- Simple Work Package level, matrix-type tracking tool
 - Task description
 - Person(s) Responsible
 - Dates planned, organized, and actually delivered

Reports to Customer

- Work completion status & projections
- Changes (by requests &/or events)
 - Impacts on cost/time/scope
- PM should bear responsibility
 - Honest & frequent
 - Avoid “Surprises”

Monthly Progress Reports

- Brief project status summary
- “Red Flag” items & corrective action
- Accomplishments, changes, & projections
- Minor problem areas & corrective action
- Cost & manpower situation

Reports to Project Manager

- Work completed to date
- Forecasts:
 - Costs at completion
 - Schedule expectations
- Financial status
 - Incurred costs
 - Planned vs. actual