Why Track a Project?

Keep the following on target:

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

Project Manager’s Duties

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

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

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?”

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

Project Reporting

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

Graphical Methods—Pros

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

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

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

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

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
### Formal Review Meetings

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

### 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

### 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

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
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”