Project Monitoring and Control Cheat Sheet

by Natalie Moore (NatalieMoore) via cheatography.com/19119/cs/2243/

The project control life cycle (PCLC) steps

1. Produce project plan
2. Monitor progress against plan
3. Compare actual progress with planned progress
4. Identify variations from the plan
5. Apply corrective action as / if necessary

Steps 2 - 5 should be repeated to continue the control cycle

Taking corrective action

PMs role is day to day to apply minor corrections as required

Major corrections need to be referred to superiors

Tolerance – PMs authority to make changes or apply corrective action

Exception report – outlines problem and options for solution, given to the project board. Includes:

- Background
- Reasons why the exception arose
- Options
- Risks
- Exception plans showing how the project needs to be amended to implement suggestions
- Amended business case
- Recommendations

Taking corrective action (cont)

Contingency pool – set of resources controlled by PM and can be allocated by PM as needed

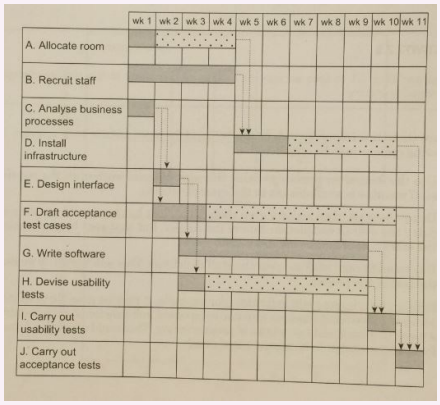
Recommendations may include:

Work harder, longer or faster	Solve a short term problem or meet a deadline. Tired, stressed and demotivated staff. Increased costs if overtime paid
Increase resources	Adding more people in IT does not often increase productivity, often it decreases. Training takes time and uses current resources. Expensive.
Replan	Reallocate the time on tasks which took shorter than expected. Internal movement of staff at no extra cost.
Extend the time scale	Sensible option. Common choice, requires negotiation. Extending deadline often seen as weak management or the project being out of control. More expensive

Taking corrective action (cont)

Reduce scope	Deliverables removed or delayed until later. Does not reduce costs, but value to the user may be reduced
Terminate the project	If no other option is ok, this maybe the only sensible thing to do. Maybe politically unacceptable

Gantt Chart Example



Monitoring progress

What should we monitor?	Progress toward deliverables, products and milestones. Progress in the WBS. % complete. Resource usage. Expenditure. Scope and size of deliverables. Watch out for scope creep. Monitor quality.



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Monitoring progress (cont)

How should we monitor?

Formal	Lay frequency, content and format out at the beginning of the project.
-	Advantage: get commitment from people in writing and establish routines
-	Disadvantage: reports maybe seen as an unproductive overhead. Staff need to be convinced of the value
-	Types: Written progress reports, email, progress meetings
Informal	Manager have an awareness of what team enduring
-	Advantage: more honest and faster communication of problems
-	Disadvantage: need to avoid micro managing
-	How: Chats with the team individually

Purpose of Team meetings

AKA Checkpoint meetings

Weekly / agile might be daily

Report from team leader to PM will be prepared. AKA Checkpoint report

Agenda typically

- Each team members progress against their plans
- Reasons for variances
- Expected progress – what each team member will do next
- Current problems or issues
- Possible future problems – may include risks from the risk register

Issues log: record issues in an issues log, which will be updated as they are resolved

Backlog list: In an agile project a backlog list of tasks completed and to be done would be updated

Programme board / steering committee meetings

Projects are sometimes grouped into programmes, where a number of projects contribute to a set of overarching objectives

Freq	Less frequent
Agenda	Less detailed. More of a business focus than a project focus

Cumulative value chart with earned value



Applying control

No point in monitoring without control

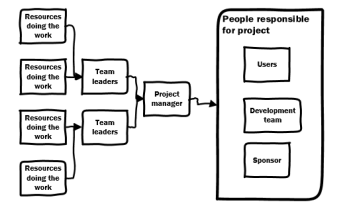
Do through the reporting cycle

- Problems reported in progress
- Apply controls to bring it back on course (Move resources from non-critical to critical)
- Review allocation of resources
- Reduce scope

Important to understand

The people responsible for the project have the right to change the project objectives, not the project manager

Reporting structure



Reports should be concise and relevant. Sent only to those who need them.



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Highlight report

The report to the steering committee

Intervals and topics in report need to conform to requirements of the recipients and the importance of what is being conveyed.

Obtain formal agreement on reporting procedures from all parties involved

Purpose of Project board meetings

Attendees	PM and project board members, perhaps a secretary
Freq	~monthly. Larger projects probably has less frequency of catch ups
Agenda	Similar as for team meeting
Report	Highlight report, supplied by PM

Highlight report - typically includes the following information

-	Details of progress against project plan
-	Current milestones achieved
-	Deliverables completed
-	Resource usage
-	Reasons for any deviations from the plan
-	New issues and unresolved issues
-	Changes to risks assessments
-	Plans for the next period and products to be delivered
-	Graphical representations of progress information

Graphical representation of progress information

Gantt chart

You will need to compare the current situation with the original plan, so the details on the Gantt chart need to be baselined

- Take a snapshot of the schedule at key points
- Maybe several but an important one will be the final agreed schedule at the beginning of the project

Cumulative resource chart

- Present usage details
- Aka S curve chart
- Data points: Expected expenditure & Actual expenditure

Earned value analysis (EVA)

- See if we are ahead or behind time, and above or below budget
- EVA shows budget originally allocated to completed items
- When completed we can say value is earned



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