

How to Monitor a Project



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HOW TO MONITOR A PROJECT

Monitoring a project means gaining enough information about the project to know when deviations to the project plan become large enough to warrant corrective actions. It also means obtaining information about product development, team performances, and recognizing potential risks. This is typically accomplished through project status reports and regular project status reviews.

HOW TO WRITE PROJECT STATUS REPORTS

Project managers often depend on regular status reports to obtain this needed information. However, inexperienced project managers often ask for too much information which requires significant writing time from the project members. When a project member is writing up a project status report they are effectively not performing project work. Extensive project reporting, either in formal written documents or with e-mail can slow project work down. On the other hand if too little information is requested by the project manager insufficient knowledge of the project will result. To resolve this dilemma the following recommendations are suggested.



Get the headlines in writing. Written reports should be written like the headlines of a newspaper. A summary of a project team's accomplishments, pending and potential problems, and plans for the upcoming week are all that are needed.

Get the details in person. Project managers should then follow up in person to obtain the details of a specific problem or potential risk. Having a "face-to-face" conversation will produce much more information in a short amount of time when compared to obtaining the same information in writing. Dialog with a team leader has another benefit which is being able to ask questions and steer the conversation where needed. Detailed written reports do not have these advantages. In cases where project members are not in the immediate area, telephone calls and collaborative software (groupware) can be used.

Use metrics to reveal problems. Metrics produced either by using Earned-Value Management (EVM), or the Zone Method, as described in Chapter 7, can be definitive indicators of a real problem. For instance, if a project team report showed an SPI of 0.75 it would require intervention by the project manager. By having metrics incorporated into the project status report the project manager will know in less than one second if a project team is in trouble. This is far superior to reading a lengthy project status report and trying to determine if a problem truly exists and if it requires intervention.

HOW TO CONDUCT EFFECTIVE PROJECT STATUS REVIEWS

Once the project is underway regular (usually weekly) project status reviews should be conducted. These reviews are not simply to produce general status information as much as they are intended to identify variances from the project management plan. Having project status metrics will make this easier than simply reviewing the project schedule. Gantt Charts, while useful, do not in themselves contain important metrics. As a minimum, project status reviews should address the following topics, all of which can be conducted in about one hour.



Present the “big picture.” The project manager gives an overview of the overall project status emphasizing how the project fits into the corporation’s strategy.

Top project concerns. Here the project manager discloses the major concerns and problems of the entire project. This is necessary so that those focusing on parts of the project can see beyond their efforts.

Review the accomplishments since last review. Project team leaders summarize their team’s accomplishments since the last meeting. This is more for them than it is for the project manager, and gives a much needed sense of accomplishment to those who are buried in the details of everyday work. Abraham Maslow points out how accomplishment (achievement) is a key motivator to most people.¹

Identify variances from the project plan. The main reason for conducting project status reviews is to identify significant variances from the project management plan and to ensure that corrective actions are taken to get back on track. Recognizing that corrective actions may not be formulated within the status meeting it may be necessary to develop them afterwards but as quickly as possible. Project managers should hold problematic teams accountable to their proposed corrective actions.

¹ A. H. Maslow, *A Theory of Human Motivation*, (Washington: Psychological Review, 50), 370-396

Review major project risks and challenges. To prevent being caught off guard by potential project risks it is a good practice to examine any near-term risks in order to determine if a prepared response should be implemented. Simply having a risk response prepared will not be adequate if the response is invoked too late.

Emphasize the most immediate milestone. While the ultimate project goal is vital to the project's success, the most immediate milestone is also important. The first major milestone will be an opportunity to show a project's success for the first time. If met, a modest celebration should be conducted. Everyone on the project should be included whether or not they were actively involved in the first milestone. This breeds a team spirit within the project.

Recognize exceptional performers. Too often a project manager's attention is given to problematic teams and exceptional performers are taken for granted. "After all, exceptional performers are only doing their job" is the common mindset. This is poor management. Exceptional performers, whether they are individuals or teams, should be recognized and appropriately rewarded.

Encourage and assist lagging performers. Instead of humiliating lagging performers in the project status review meetings, project managers are wise to encourage and assist them. This may require informal mentoring by the project manager or by one of the high-performance teams. As a result, a salvaged low performer will often develop a high sense of loyalty to a supportive project manager.

Review the project schedule and cost status. If EVM or Zone Tracking methods are used, schedule and cost control charts should be reviewed. Unacceptable variances will require corrective actions, and metric trends should also be examined and remedied to prevent the untenable growth of schedule or cost problems.

Review the product development status. The technical status of the product should be reviewed to identify any anomalies, and to ensure that it is successfully moving to meet customer requirements.

Anticipate potential problems. In addition to reviewing the project's present status efforts should be made to look for potential downstream problems. Asking key project participants to look for near-term risks is far better than looking too far in the future. "Near-term" can mean the next three to four weeks.

Review project-level action items. Often there are open action items related to the project's customer or other corporate projects. A review of these types of action items should be reviewed since the project manager will often depend on key project personnel for providing needed action item resolutions.