5 TRACKING AND MANAGING THE PROJECT

John Moore[1]

Collecting Status

Keeping the project in line with existing plans and objectives is a difficult challenge. The aim of tracking and monitoring is to concentrate team attention on those factors that give the most insight into and indication of how the project is proceeding. If the tracking and monitoring process is conducted efficiently, the information derived will enable the project manager, team members, management, and certain stakeholders the ability to take decisions reflecting the changes that occur in all projects.

A key result of effective tracking and monitoring is the ability to adaptively manage in "real-time" all aspects of the project. "Real-time" means that as soon as a change in the project is identified as having happened or is in need of happening, the project manager and relevant personnel are immediately aware of that change. Although real-time is hardly ever achieved, it is the goal of tracking and monitoring. Thus, the better information you have the closer you actually get to real-time management.

At the same time, effective tracking provides so much focus and concentrated energy that teams often become enthusiastic and motivated by examining project progress and making *timely*, *informed* project decisions. If the team is not sure what is happing, they will not feel involved in project decision-making and become less motivated to efficiency and innovation.

An effective tracking and monitoring system will collect information – or status – on at least three primary subjects; schedules, open issues

[1] See footnote page 3.

(remember the *issues log*), and risks. Areas usually included under each are:

Schedules

- Have tasks begun according to existing schedules? If not, why not and what is being done to start them?
- Have tasks been completed according to existing schedules? If not, why not and what is being done to get them finished?

Open Issues

- What is the status of all open issues?
- What actions can be done to resolve them?
- Are any new open issues apparent?

Risks

- What is the status of the identified risks?
- Are any new risks apparent?

How the project manager and project team collects information varies from organization to organization. Some typical ways to collect information are as follows:

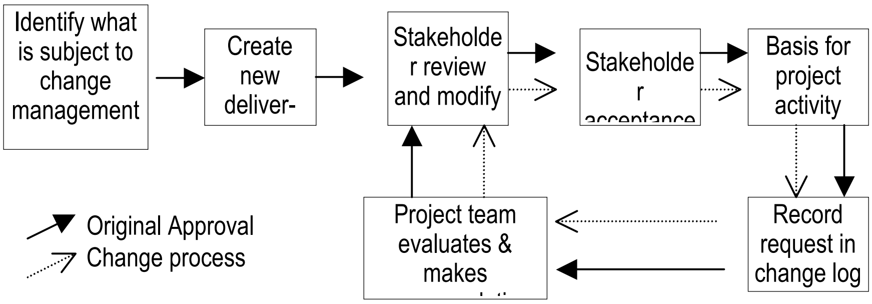
- Meetings (from meeting reports or minutes)
- One-to-one / individual meetings
- Submission of update reports by team members
- One-on-one meetings between the project manager, senior management, or other stakeholders
- Attributable or un-attributable surveys of team members
- Customer / stakeholder service feedback

Key questions:

- How often will "collect status" be formally done?
- How will it be done? What will be the format?
- What information will be monitored?
- What decisions will be made?
- What actions will be taken?
- How will these decisions and actions be communicated?

Planning & Taking Adaptive Action

Every kind and size of project faces changes. The specific change management process followed should fit the size and complexity of your project. But every change management process follows the same fundamental model.



Project Close-Out

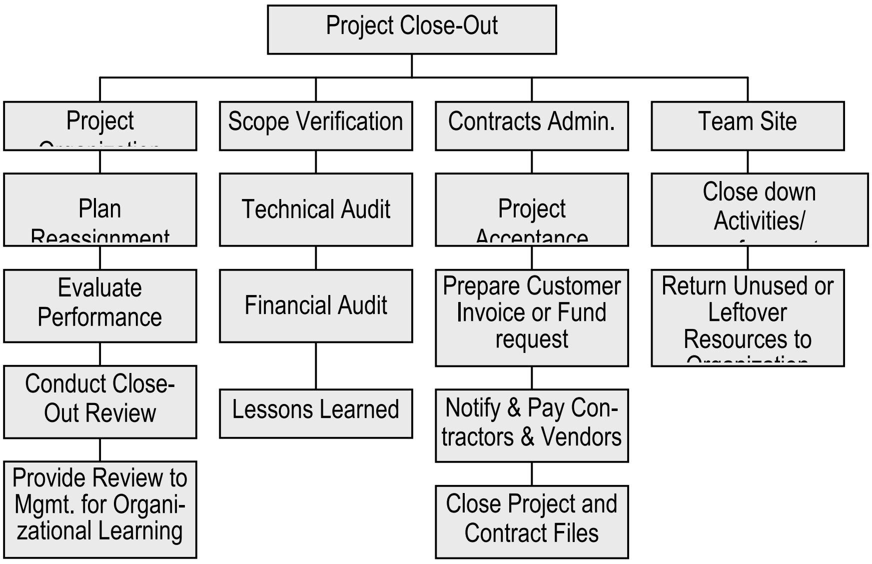
Experience – individual, team, management, and organizational – gained during a project is one of the most valuable outcomes, and can play a significant role in determining future project success. But this learning must be realized and retained by the organization. An effective close-out procedure will both capture this experience and ensure that the project's finish is conducted smoothly and that no outstanding project-related issues remain. The close-out process allows for an assessment of what practices did or did not promote project effectiveness. Such assessments are key to deriving new processes and methodologies for improving future project performance. If a proper close-out is not conducted, the organization loses the potential for increased efficiencies as lessons are having to be learned again – at the organization's as well as future team's expense!

That said, many project managers and team members perceive themselves as being too busy with plans for the next project or other issues to formally close out a project. Those teams that take the time – it can be done in a day – achieve greater performance in succeeding projects.

Key questions to ask while closing out:

- What project management techniques were effective? What techniques were not effective?
- What project management aspects need improvement? How can they be improved?
- Has all project paperwork – ex. personnel, financial, organizational, stakeholder-related – been completed?
- Have the 'lessons learned' been recorded and filed accordingly?
- How can the "lessons learned" be used in the future?
- Has the project file(s) been stored properly?
- Have the team workspaces been cleaned and made ready for the next team's use?
- Have any remaining resources – financial or material – been returned or reported?
- Have all consultants, contractors, and vendors been paid?
- Celebrate project success!

Sample WBS for Close-Out Phase



An important, and often neglected, close-out activity is to acknowledge each team member's contributions to project success; thank people for their work, it is the least – and often most appreciated – thing they deserve.