**<u>Deeply Practical Project Management</u>**
<u>Summary Checklist</u>
<u>Monitoring & Control</u>

"Have no fear of perfection: you'll never reach it."
– Salvador Dali, 1904-1989

The following provides a summary checklist of the key points of the Monitoring and Control stage:

- The purpose of monitoring and control is to track the status of scope, schedule, cost, and risks, and take action to keep performance as close to the plan as possible.

- Know what is important to each stakeholder, actively manage their expectations, never over commit, and give them a full status update at least once a month.

- The most basic and important project control is the weekly maximum one hour status meeting with the leads to update the issues list and risk register – never cancel this meeting to get work done instead, and keep it going until the end of the project.

- Solve scope creep, the second most common cause of project failure, by instituting a rigorous change control process, and try hard to implement any new scope in the next project or phase, or trade out other scope equivalent in impact to balance it off.

- Maximize schedule performance by ensuring the team has the skills and resources required, are fully empowered and motivated, understand schedule delays drive both cost and new risks, and then manage the critical path like a hawk.

- For critical schedules, hold a stand-up 15 minute meeting each morning, ask each lead what they did yesterday, what they will do today, if there is anything preventing them from accomplishing it, and to let you know immediately if anything blocks them from progress.

- Compress schedule by crashing – adding more resources such as better tools or a very experienced person that has just done the same job, and fast tracking – starting deliverables before their predecessors are completely finished where really practical and no rework will be needed.

- Obtain costs reports at least once a month, ordered by cost account that collect all material, services, and personnel time, delegate management to the person best able to manage the cost, and review the reports yourself to maintain oversight.

- Cost cannot be arbitrarily reduced once planned, and can only be effectively managed by controlling the drivers – scope, schedule, and risks.
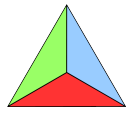
- If costs must be reduced the only option is to reduce scope, a decision that should be made as early as possible to maximize the benefits.

- "Quality must be planned in, not inspected in"; quality parts and processes reduce time and cost by increasing efficiency and reducing required testing and customer acceptance issues; and continuous small improvements add up to big results.

- The highest quality goal is for the project output to be "fit for purpose", and is greatly assisted by peer reviews to find issues the deliverable owners cannot see, and user reviews of all draft work in progress to find requirements that were missed – only working in items essential for project success, and trading out other scope to balance off the impact of new work wherever possible.

- Delegate ownership of risks to the lowest level possible, watch for the triggers, spend money to manage risks early when they are least expensive, add new risks to the register whenever they arise, and reduce and remove risks very cautiously.

- When the project is large enough to support the administration, use earned value management to provide objective numerical metrics and projections of cost and schedule performance, based on the amount of work done compared to what was planned to be done, greatly aiding the confidence of stakeholders in project reporting.

- You can help persuade people to resolve an issue by understanding what is important to them and putting it in their interest, depersonalizing the issue and strengthening your position by putting supporting data on a single piece of paper, when needed establishing they are "standing on a burning platform", and then, if necessary to protect the project, escalating resolution up the chain of command.

- Formally status the project scope, schedule, cost, risks, and issues monthly to obtain solid information to help you monitor and control, and to review progress with the sponsor and stakeholders so they are kept fully informed and never surprised:

  ◦ Use a one page report format to keep the reporting manageable, and to ensure the information you need to discuss does not get lost.

  ◦ Ask the stakeholders for assistance with anything they can help with.

  ◦ If the risk budget is being consumed too fast, ask the stakeholders for direction on what is most important to them – scope, schedule, or cost – and after they pick two, let the third one go as little as possible to manage the project to the best outcome possible in the circumstances.

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