PATH USA
Premier IT Services

Project Monitoring Guidelines

Version No: 1.0

Date: May 18, 2017

Revision History

Version	Date	Prepared by / Modified by	Change Summary	Approved By	Approved On
1.0	May 02, 2017	Sridhar	First Draft Made	Anitha T G	May 18, 2017

Table of Contents

1. Introduction

Projects with strong monitoring and evaluation tend to stay on track. Additionally, problems are often detected earlier, which reduces the likelihood of having major cost overruns or time delays later.

Monitoring can be defined as the ongoing process by which stakeholders obtain regular feedback on the progress being made towards achieving their goals and objectives.

Monitoring is also an ongoing process. The lessons from monitoring are discussed periodically and used to inform actions and decisions.

1.1. Daily Scrum

The daily scrum is a 15-minute time-boxed event for the development team. The daily scrum is held every day at the same time and mostly at the same place to reduce the complexity.

The team uses daily scrum to inspect the progress toward the sprint goal and to inspect how progress is trending towards completing the work planned in the sprint backlog. This will help in optimizing the probability of meeting the goals.

Every day, the development team should understand how it intends to work together as a self-organizing team to accomplish the sprint goal.

The objective of the meeting is to ask and answer below 3 questions from each team member

- What did I do yesterday that help the team to meet the sprint goal?
- What will be doing today to meet the sprint goal?
- Do I see any impediments that hamper the team in meeting the goal?

1.2. Sprint Review

Sprint review is held at the end of the sprint to inspect the increments. This will be done collaboratively with scrum team, scrum master and product owner. Based on the sprint review the team may update the product backlog as required to make the product better. This meeting is not a status meeting the intention is to get the feedback on the increment and come out with any changes if required.

This may be around 4 hours meeting for a one month sprint. For shorter sprints this effort might be lesser than 4 hours. The scrum master ensures that the event takes place with the intention and the purpose.

Sprint review includes:

- Attendees include scrum team, product owner, scrum master and anyone else invited by product owner
- The product owner explains the definition of done and the user stories expected to be delivered
- Development team demonstrates the work done in the sprint
- The team collaboratively collects the feedback on what is accomplished and what is supposed to be done.

- Any new changes or feedback should be updated to the backlog and reprioritized in the coming sprints.
- Product owner understand the value delivered and how this can help the users

Based on the sprint review the product backlog might get updated and also gets some inputs for the next sprint planning.

1.3. Sprint Retrospective

The sprint retrospective is an opportunity for the Scrum Team to inspect itself and create a plan for improvements to be enhanced during the next sprint.

The sprint retrospective occurs after the sprint review and prior to the next sprint planning. This can be around 2-3 hours meeting for a sprint of one month duration. For shorter sprints this will be shorter.

The scrum master ensures that the meeting is productive and positive. The purpose of the sprint retrospective meeting is to

Inspect how the last sprint went with regards to people, process, relationship and tools

Identify what went well and what could have been improved

Identify the actions and implement them in the upcoming sprints.

The inputs for the sprint retrospective could be

- Burn-down charts
- Estimations
- Sprint metrics
- Feedback from product owner
- Team inputs
- Velocity
- Issues/ challenges observed
- Defects

2. Monitoring the product backlog

At any point of time the product owner should be able to know the work remaining to achieve the overall product or project goal. The product owner tracks the work remaining at least at the end of each sprint during sprint review.

Based on the velocity the product owner will get an idea when the final product will be available to use. This information can be shared with all other stakeholders by the product owner. The burn down charts for product backlog could be one of the ways to monitor the remaining work.

2.1. Weekly Progress

There are some stakeholders within or outside the organization who are not part of the sprint/scrum and they may not have the visibility on the project. For these people the scrum master has to share the weekly status report.

Weekly status report includes:

- Sprint Completed – What were delivered in that sprint
- Sprint Progress - Current Sprint what is the progress
- Roadblocks
- Issues/risks/constraints if any
- Sprint metrics
- Velocity

2.2. Project Monthly Review

This review is typically done by the next level to the project and involves senior management at different levels. The objective of this review is to provide the overall visibility to the management on what is been happening in the project last month.

The agenda for this meeting includes:

- Sprints Completed
- Sprints in Progress
- Sprints planned for next month
- Any major accomplishments
- Feedback from customer
- Sprint level metrics and trends
- Risks and mitigation / contingency action
- Dependencies and issues
- Escalations
- Audit status and any issues reported in the audit
- Change requests if any
- Infrastructure related issues
- Third party / vendor performance or issues

The actions came out from the PMR will be tracked in the project workbook. The scrum master will prepare the presentation for PMR using the template and presents it during the monthly review.

2.3. Risk Monitoring

The risks are identified and logged in project risk tracker. The scrum master will regularly monitor the risks status and updates them as required.

The scrum master has to look for the following during the risk tracking or monitoring

- Any new risks
- Status of existing risks
- Risks occurred and what is the impact and how it is been addressed
- Status of risk mitigation actions and impact of these actions
- Change in the risk occurrence, severity
- Any changes to the risk response strategy

The frequency of updating the project risks include:

- Periodically once in a month
- Sprint Starting
- Sprint Ending
- Release End
- Changes in the product backlog
- Customer feedback
- Changes to the project environment

2.4. Metrics Monitoring

The data for the metrics is collected as expected and planned in the project management plan. The metrics report will be created at the end of every sprint. Before analyzing the metrics that data has to be validated by the scrum master to ensure that the data received is complete, as per the definition and not having any abnormal behaviors.

Validated data has to be updated in the metrics report and generate the trends and patterns as planned in the project management plan.

The scrum master has to look out for the following in the metrics report:

- For the current sprint
  - Does the metrics within the goals/targets set by the project?
  - If there are no goals do the metrics significantly differ from previous sprint or expectations from the project
- Trend and Patterns
  - Do we have significant increasing or decreasing trends from the previous sprints?
  - Any sprint has got significant deviation from the expected
  - Any continuous problems observed from the charts

All the inferences are to be updated in the metrics report; any actions are to be tracked in the project workbook. The metrics report is to be shared with the team and any other stakeholders as planned.

Any continuous/ significant deviations in the metrics the scrum master can plan for a Root Cause Analysis to address the issues permanently as possible.