

## **Performance Tracking & Reporting—Activity Definition**

### **Purpose:**

The objective of this activity is to ensure that the team is making satisfactory progress to the project goals. The purpose is to:

1. Track all major project variables – cost, time, scope, and quality
2. Track actual project accomplishments and results
3. Provide visibility of progress as the project proceeds, so that the team and management can take corrective action early

### **Participants:**

The Project Manager is responsible for this process. The relevant stakeholders are responsible for reviewing the status reports that the Project Manager provides.

### **Inputs:**

Project Schedule [1], Work Breakdown Structure [1], Project Overview Statement [1], Integrated Project Plan [3], Communication Plan[3], Time sheets[3]

### **Process:**

1. Project team members should communicate regularly with their Project Managers, informing them of the current status of the project and managing future expectations.
2. It is the Project Manager's responsibility to get the relevant information from each team member.
3. The Project Manager should monitor, at an appropriate interval, progress to plan on the key elements:
  - a. Tasks starting and ending when expected
  - b. Tasks open for work
  - c. Deliverables with content and quality level required
  - c. Level of effort as planned
  - d. Milestones being met when planned
  - e. Costs as budgeted
  - f. Critical resources as planned
  - g. Risk management progress
  - h. Issues and action item resolution
  - i. Review and process requests for changes to the plan
  - j. Adherence to agreed Quality Strategy
  - k. Status of critical path tasks
4. Project Managers should report the status of a project to the relevant stakeholders established in the governance structure regularly. The template for the status report allows for a formal, documented communication of progress to occur.

### **Outputs:**

Status Reports, Tracked Project Schedule

**Performance Tracking and Reporting—Guidelines**

1. The Project Manager uses the project plan as a basis for monitoring.
2. The Schedule, budget, defect counts can all be used as project measures. e.g. initial effort estimates compared to the actual effort incurred, track rate of spending compared to the planned spending, monitor schedule by tracking planned milestone dates compared to actual end dates of milestones,
3. Based on the guidelines set during the launch phase, teams might gather for regular meetings, or they might exchange information electronically.
4. Identify critical path items that might have issues. A high-level Gantt may be provided as part of the status report.
5. Formal progress reviews are conducted for all projects, to ensure that all stakeholders are kept informed of project status and progress. These reviews may be at key milestones for a project, or they may be event-driven or date-driven. Projects often hold monthly or quarterly reviews, in addition to (or instead of) project phase-based milestone reviews.