

PROJECT PROGRESS AND REPORTING ISSUE TRACKING AND MANAGEMENT CLOSING A PROJECT

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Overview

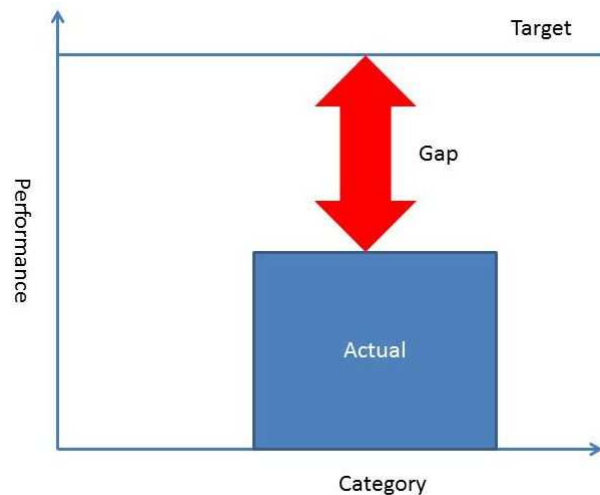
- **Project Status Reports**
 - How to Keep a Project on Schedule
 - Characteristics of Effective Progress Reporting
 - How and What Information to Update
 - Frequency of Gathering and Reporting Project Progress
- **Maintaining the Issues Log**
- **Project Meetings**
 - Team Meetings
 - Managing Project Status Meetings
 - Problem Management Meeting
 - Project Review Meetings
 - Guidelines for Managing Meetings
- **How to Close a Project**
 - Client Acceptance Procedures
 - Installing Project Deliverables
 - Documenting the Project
 - Conducting the Post-Implementation Audit
 - Tying Up Loose Ends
 - Final Project Report
 - What to Do with Project Information
 - Celebrating Success



Measurement and Analysis

"In God we trust. All others must bring data."

W. Edwards Deming



"Without data you're just another person with an opinion."

Tools, Templates & Processes Used to Monitor & Control

- The project plan can get out of balance. The controls are designed to discover out-of-balance situations early and put get-well plans in place quickly.
- Establish a reporting system that keeps you informed of the many variables that describe how the project is proceeding as compared to the plan.
- A variety of reports work as control tools
 - Most can be used in numeric and tabular form
- Use graphics wherever possible.



How to Keep a Project on Schedule

- Hold daily team meetings
- Complete tasks ASAP
- Report problems ASAP
- Don't fall victim to the "creeps"
- Don't guess – ask questions
- Good enough is good enough
- Meet but do not exceed requirements
- Be open and honest with your team mates



Characteristics of Effective Progress Reporting

- Timely, complete, accurate and intuitive
- Isn't burdensome and counterproductive
- Readily acceptable to senior management
- Readily acceptable to the project team
- An effective early warning system



How and What Information to Update

- Determine a set period of time and day of week
- Report actual work accomplished during this period
- Record historical and re-estimate remaining
- Report start and finish dates
- Record days of duration accomplished and remaining
- Report resource effort spent and remaining
- Report percent complete



Frequency of Gathering and Reporting Project Progress

- Logically once a week
- When hot issues exist, report more often, e.g. daily
- Report usually at the end of the week
 - Possible to report on different days due to cascaded schedule of senior management meetings



Five Types of Project Status Reports

- **Current period reports**
 - Cover only the most recently completed period
 - Activities that were open or scheduled for work during the period
- **Cumulative reports**
 - Contain the history of the project from the beginning to the end of the current report period
 - Show trends in project progress
- **Exception reports**
 - Indicate variances from the plan
- **Stoplight reports**
 - A variation that can be used on any of the previous report types
- **Variance reports**
 - Report differences between what was planned and what actually happened
 - The planned number
 - The actual number
 - The difference, or variance, between the two



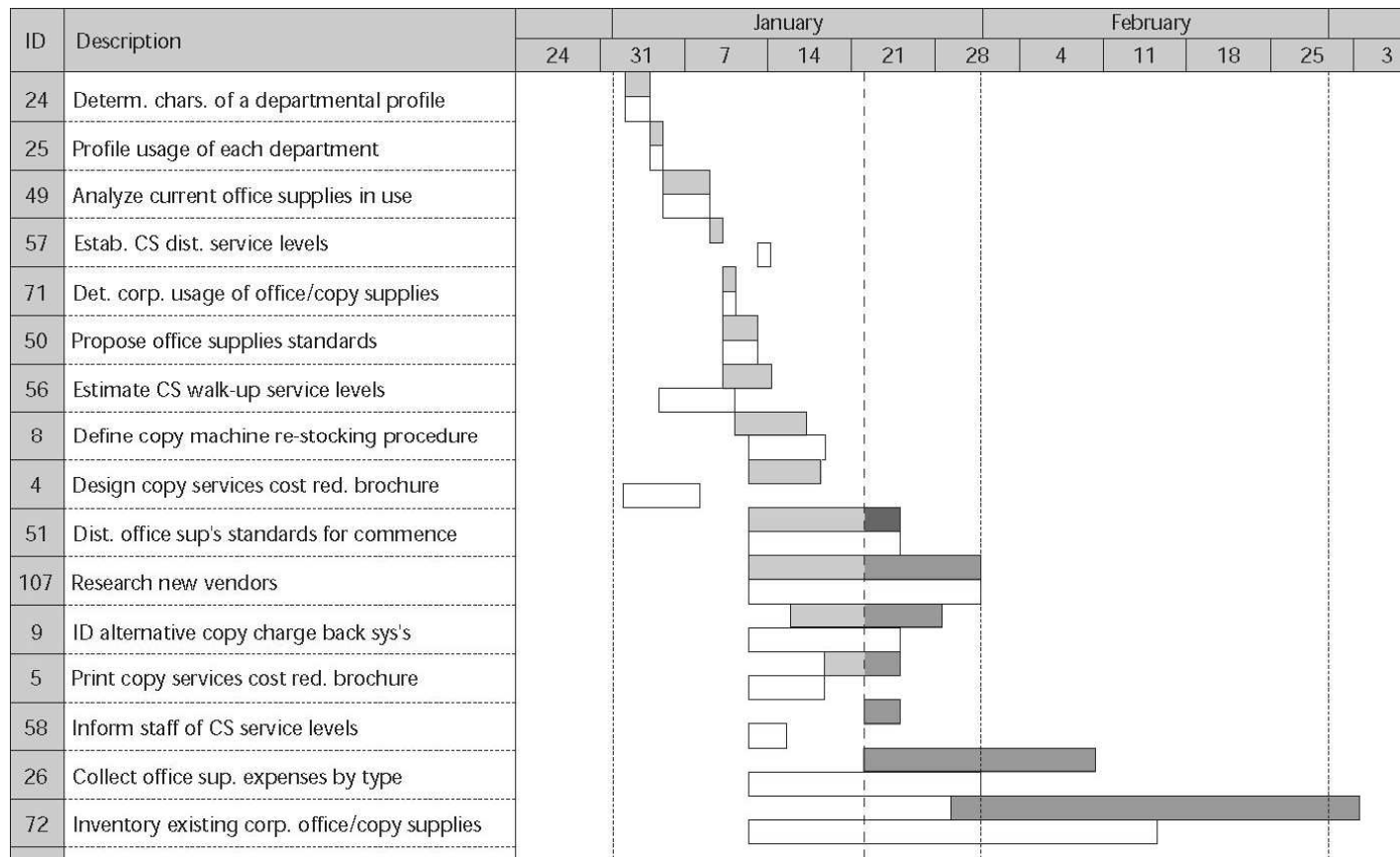
Gantt Chart Project Status Report

- Most convenient, most frequently used, and easiest-to-grasp depictions of project activities
- Formatted as a two-dimensional representation of the project schedule
- Can be used during planning, for resource scheduling, and for status reporting
- Does not contain dependency relationships

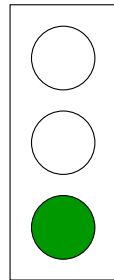


Gantt Chart Example

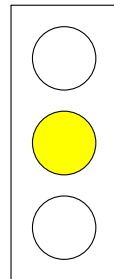
- MS Project Format



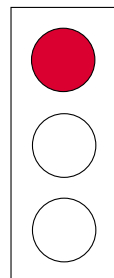
Exception Report – Stoplight Reports



The project is progressing according to plan.



**The project has a problem.
A Get Well plan is in place.
The situation will correct.**



**The project is failing.
Intervention is required.**

Stoplight Report Example

Project: Desktop Application 1.4

Scrum Prime : John Doe
Dev Manager: Jane Doe

Updated
 10/4/2018

10 - APR -18	
3 - APR -18	
27 - MAR -18	

Release 1.4	RKO	EVC	MR/BR	SDC	FC	DSC	FCE	GA
Planned	Jan 2	Feb 2						
Forecast	Jan 2	Feb 9						
Actual	Jan 2	Feb 9						

Summary of <u>Key</u> Deliverables/ Customer	Dependencies/ Impact	Status
ABE-18333 Design Spike for Screen Share Support		

Sprint Burndown:

Highlights/ Achievements/ Churn:

- 1.4 release Sprint 2 started, end date April 30th
- Design spike for Screen Sharing – not started yet due to impacting requests, possible carry over risk again
- [ABE-18292](#) : Critical defect for 1.3 release impacting fixed, released 1.3.1 MR.

Inter-team Dependencies:

Issues / Risks:

Key Actions	Prime	Due Date



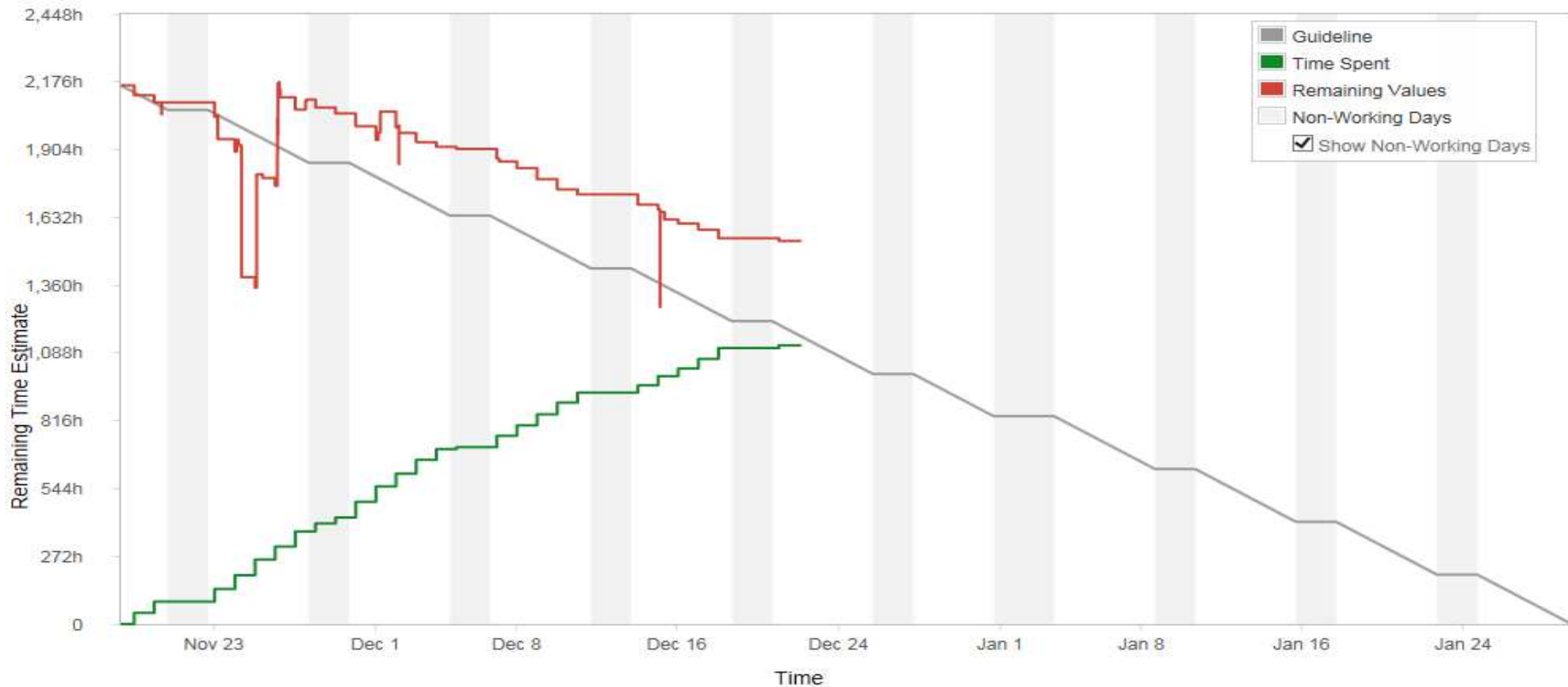
Burn Charts

- Displays the cumulative consumption of any resource over time, expressed either as a percentage of the resource allocated to the project or the quantity of the resource



Burn Chart Example

TEAM1 Sprints – Current Status



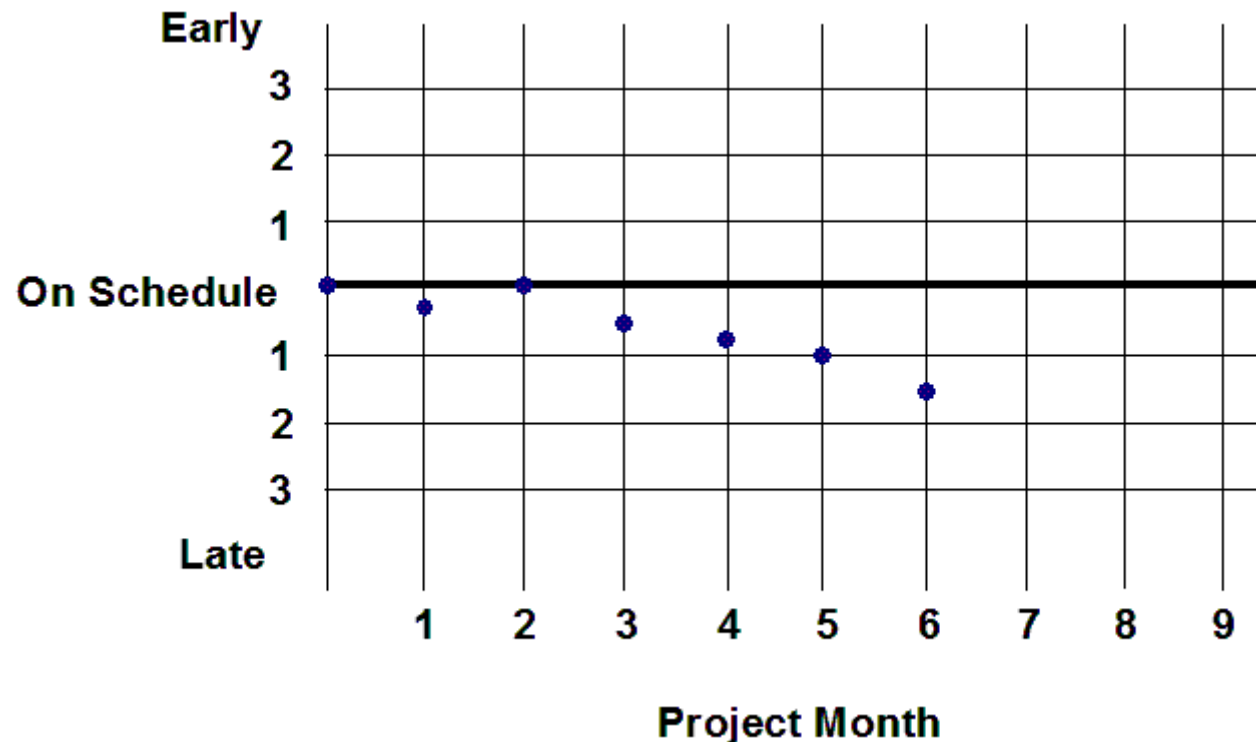
■ Team 1 – Sprint 1 Burndown

Note: Time spent graphs is correct while remaining estimate graph does not correctly change.



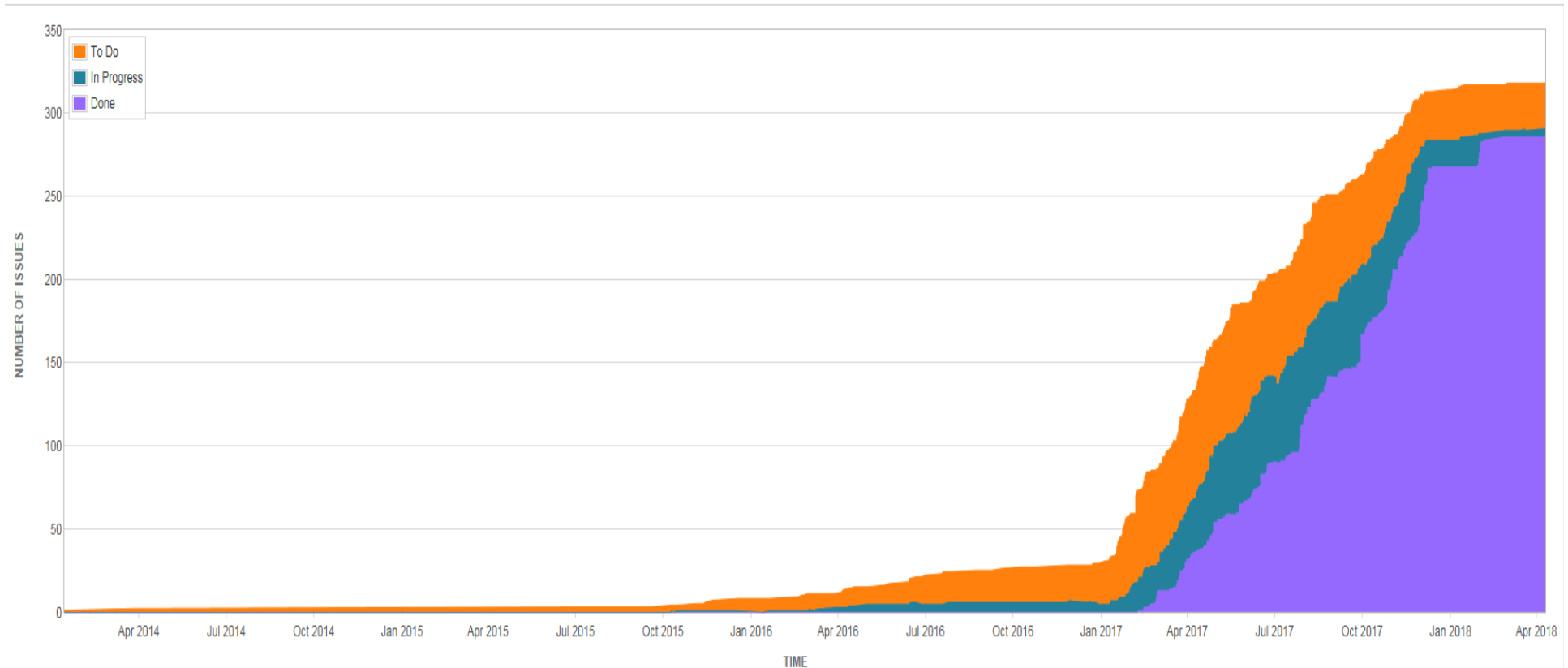
Cumulative Reports - Milestone Trend Charts

- Milestones are significant events that are tracked in the life of the project.
 - zero-duration activities
 - indicate that a certain condition exists in the project
- The milestone is planned to occur in the 9th month
- The first project report (at month 1) shows that the new forecasted milestone date will be 1 week later than planned
- The second project report date (month 2): the milestone date is forecasted on target
- The next three project reports indicate a slippage to 2 weeks late, then 3 weeks late, then 4 weeks late, and finally 6 weeks late (at month 6)



Cumulative Report Example

Cumulative Flow Diagram [Switch report ▾](#)



Shows the statuses of issues over time



Reporting to Senior Executives

- Senior managers don't have a lot of time to dwell on your report. Give them what they need as succinctly as possible.
- Graphics are particularly effective as part of your status report to management.
- **Hint:** Elevator speech format can be used for quick and easy understanding.
 - a short description of an idea, product or company that explains the concept in a way such that any listener can understand it in a short period of time. It's typically about 30 seconds, the time it takes people to ride from the top to the bottom of a building in an elevator.



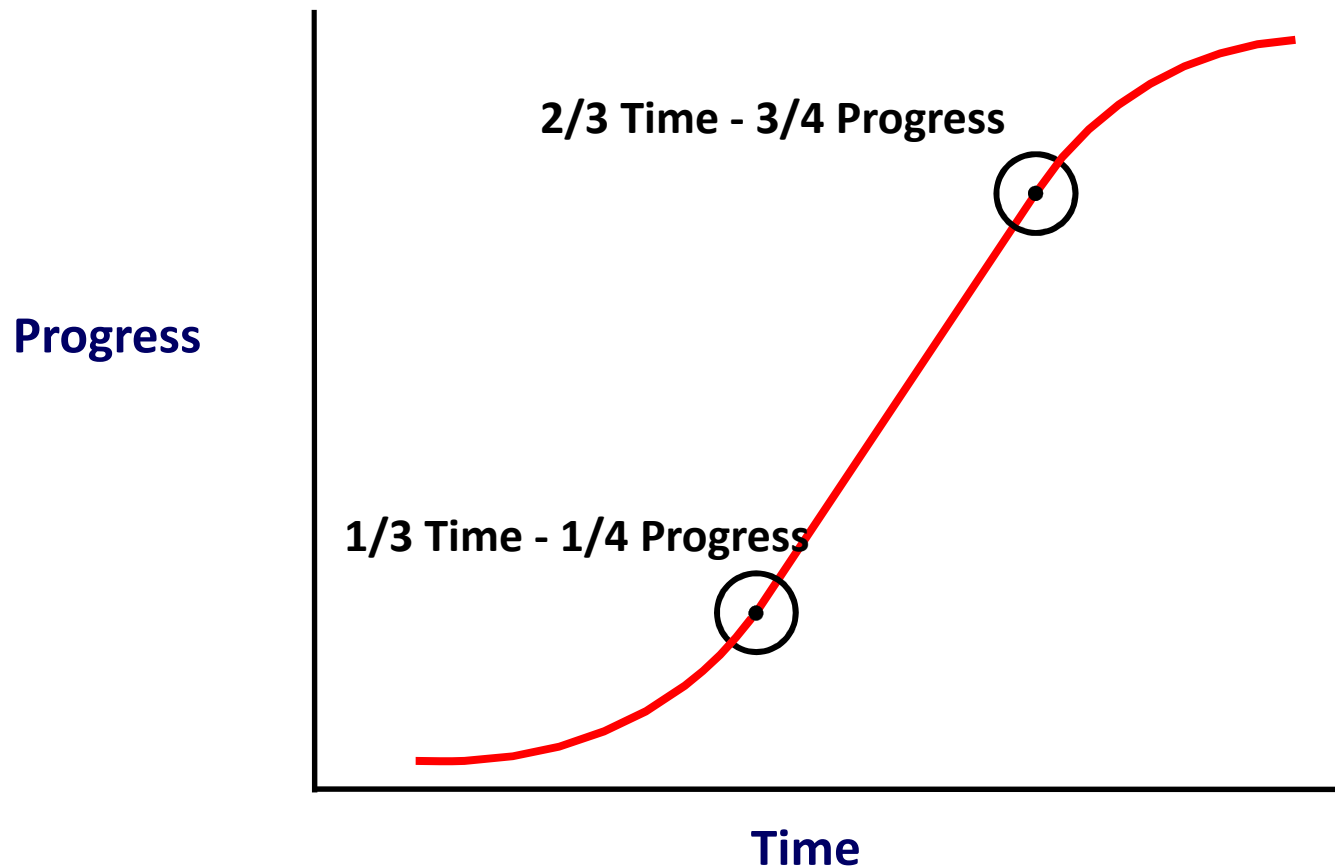
Earned Value Analysis

- Used to measure project performance
 - the dollar value of work as the metric
 - resource person hours/day as the metric
- Planned value: the physical work scheduled to be performed including the estimated value of this work (usually in \$)
- Earned value: physical work actually accomplished including the estimated value of this work (usually in \$)
- Actual work performed is compared against planned and budgeted work

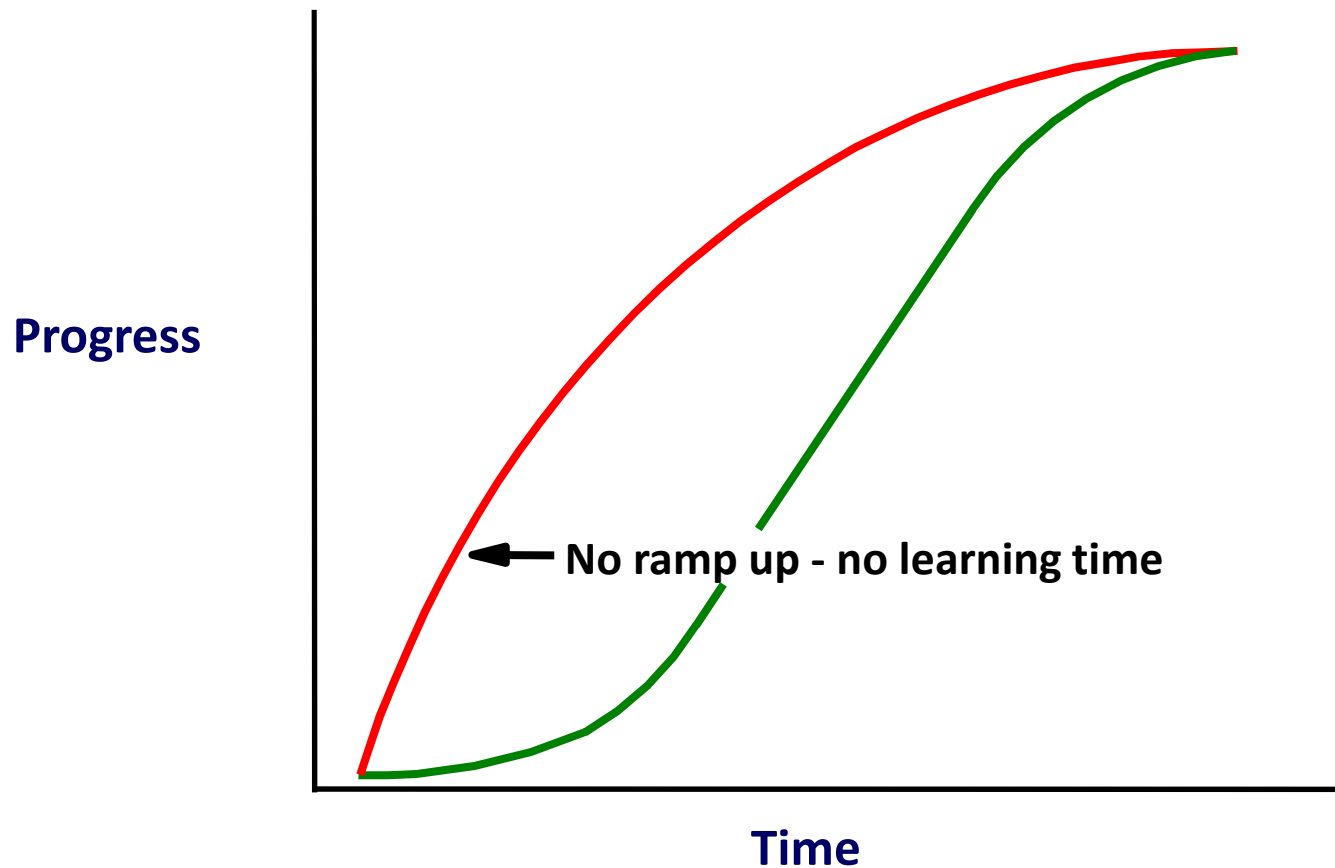


Earned Value – The Standard S-Curve

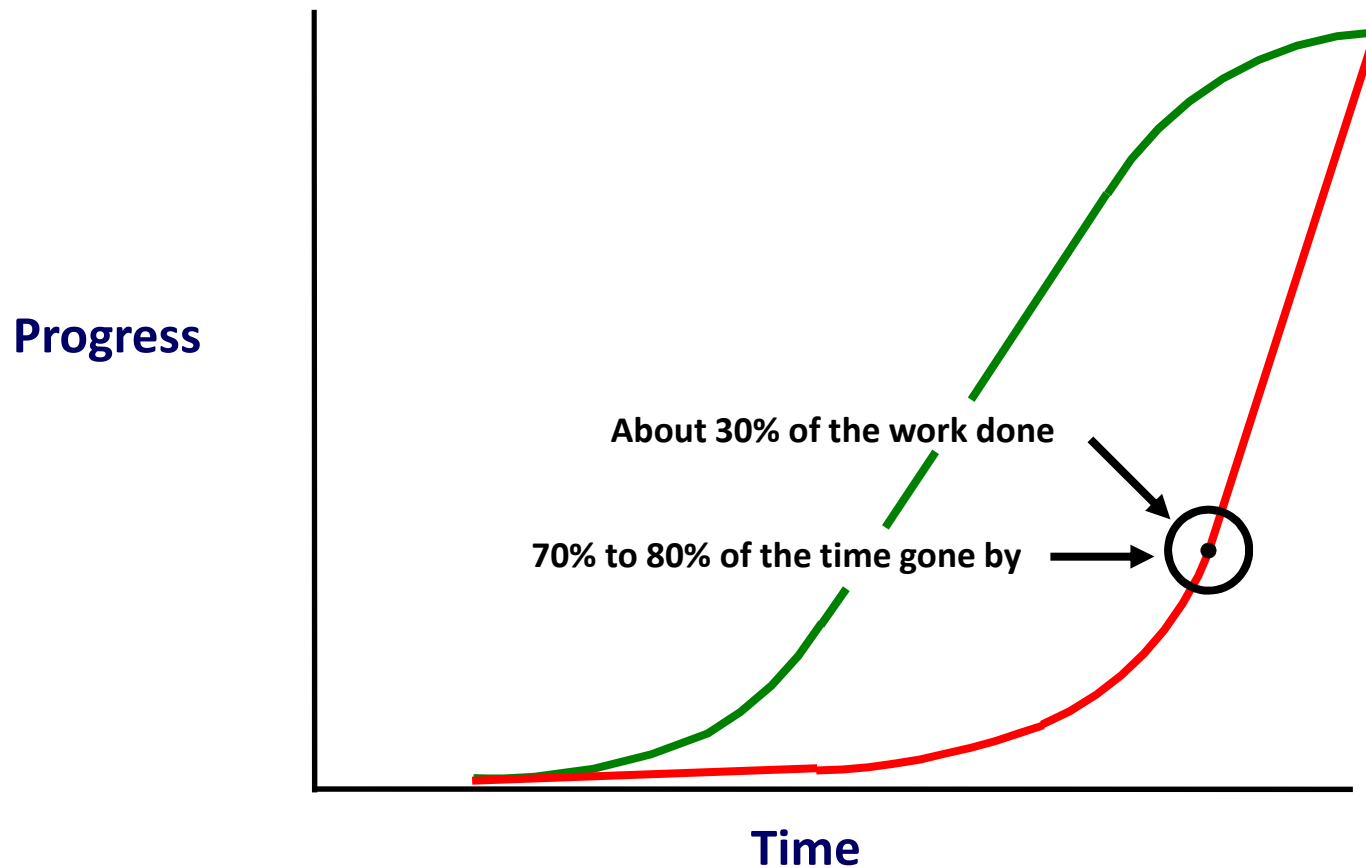
- Represents the baseline progress curve for the original project plan.
- It can be used as a reference point.



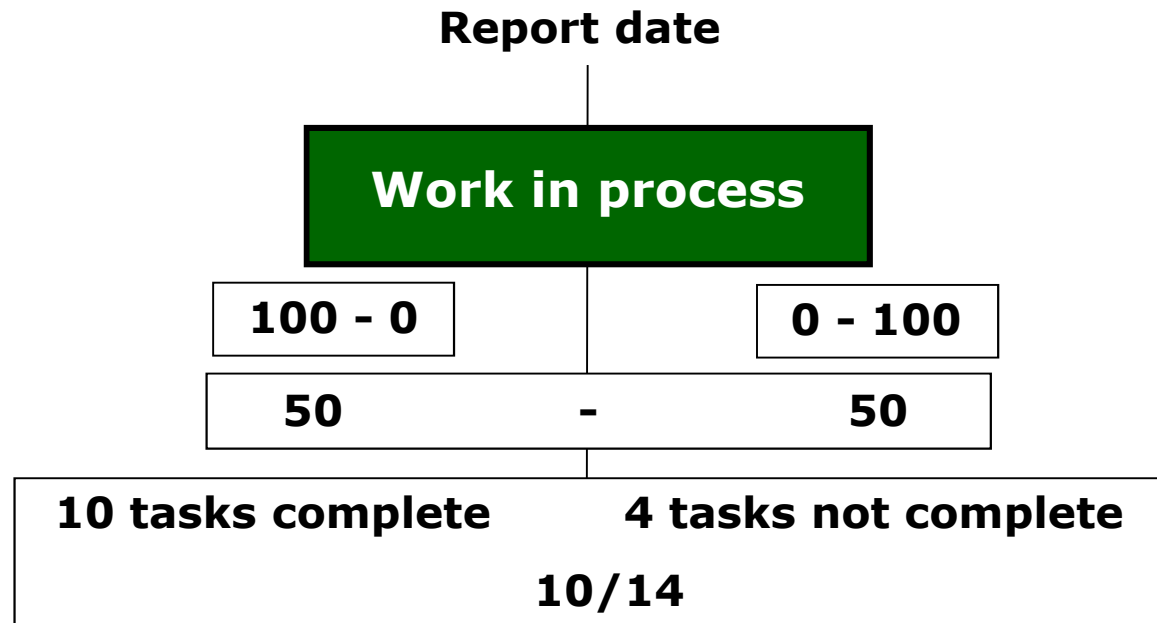
Earned Value – The Aggressive Curve



Earned Value – The Curve to Avoid



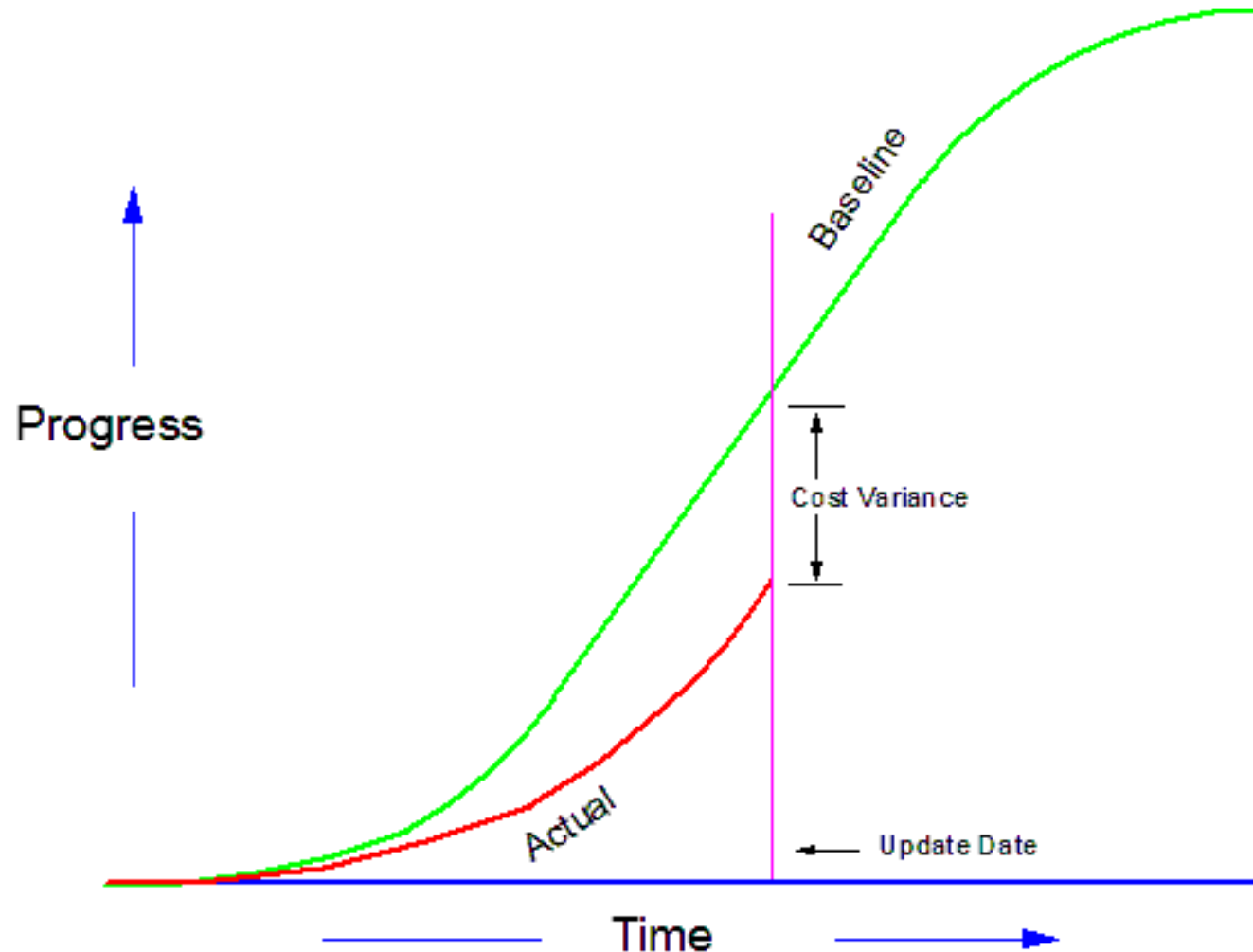
How to Measure Percent of Value Earned



- 100 – 0
- 0 – 100
- 50 – 50
- Proportion of tasks completed



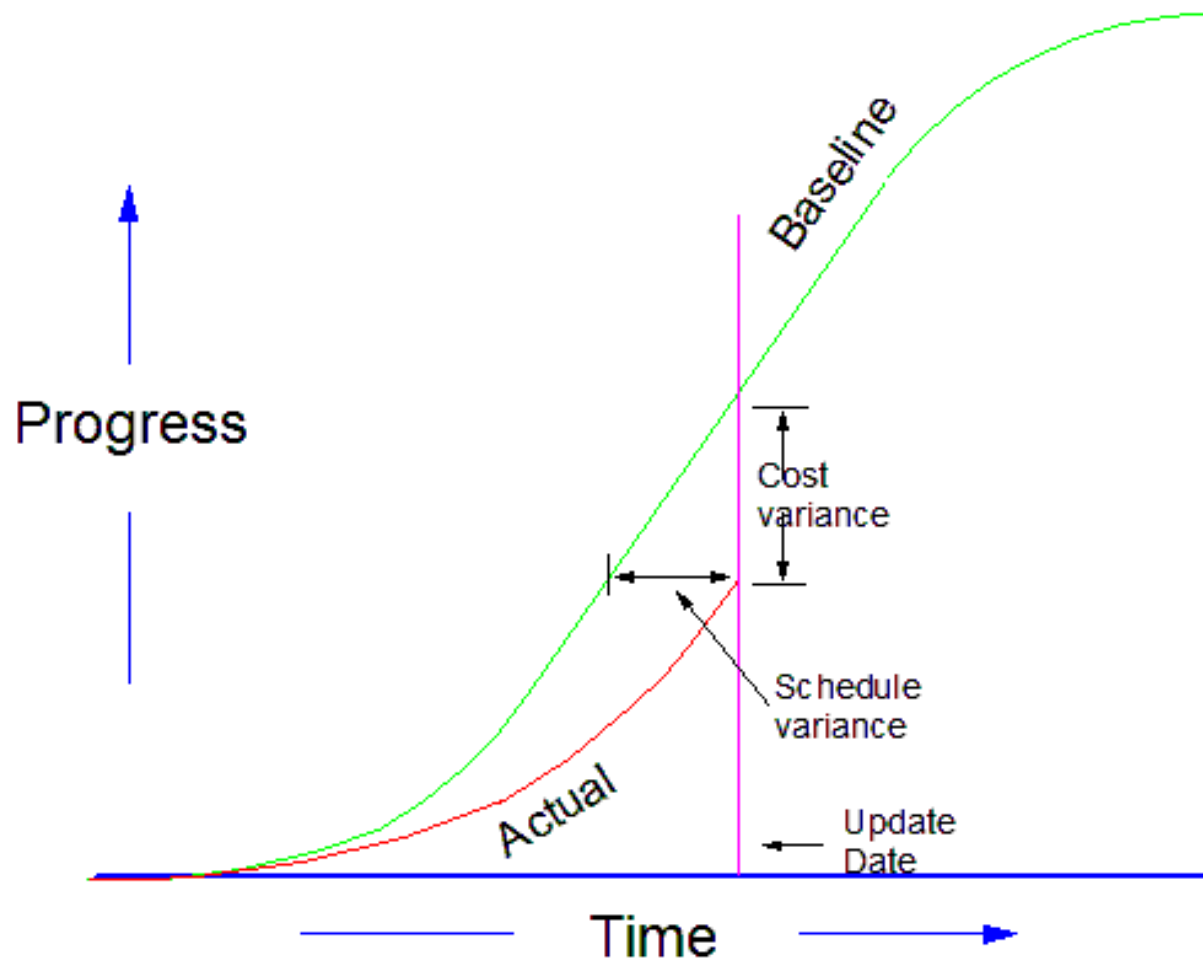
Earned Value – Cost Variance



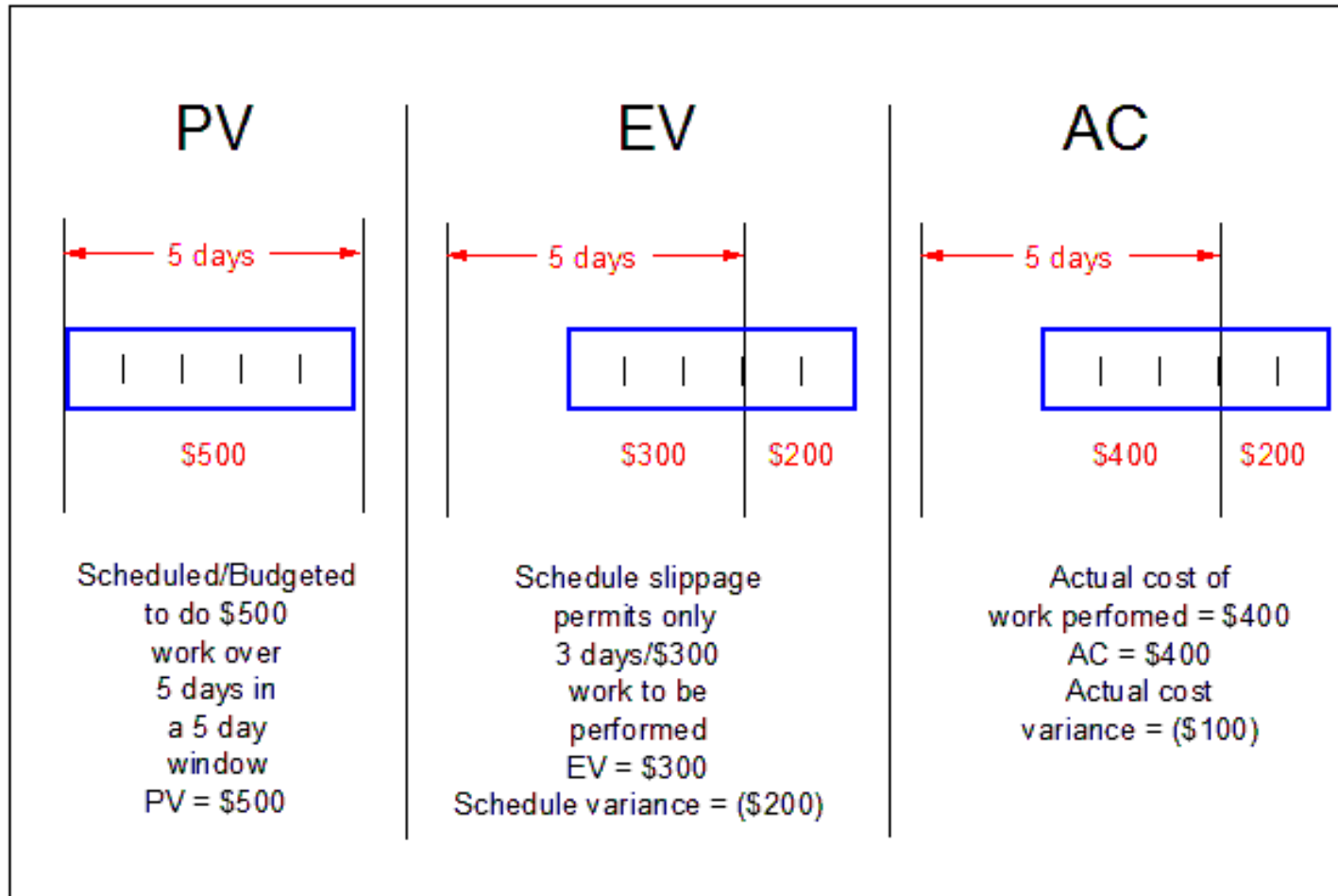
Actual progress curve below the planned curve



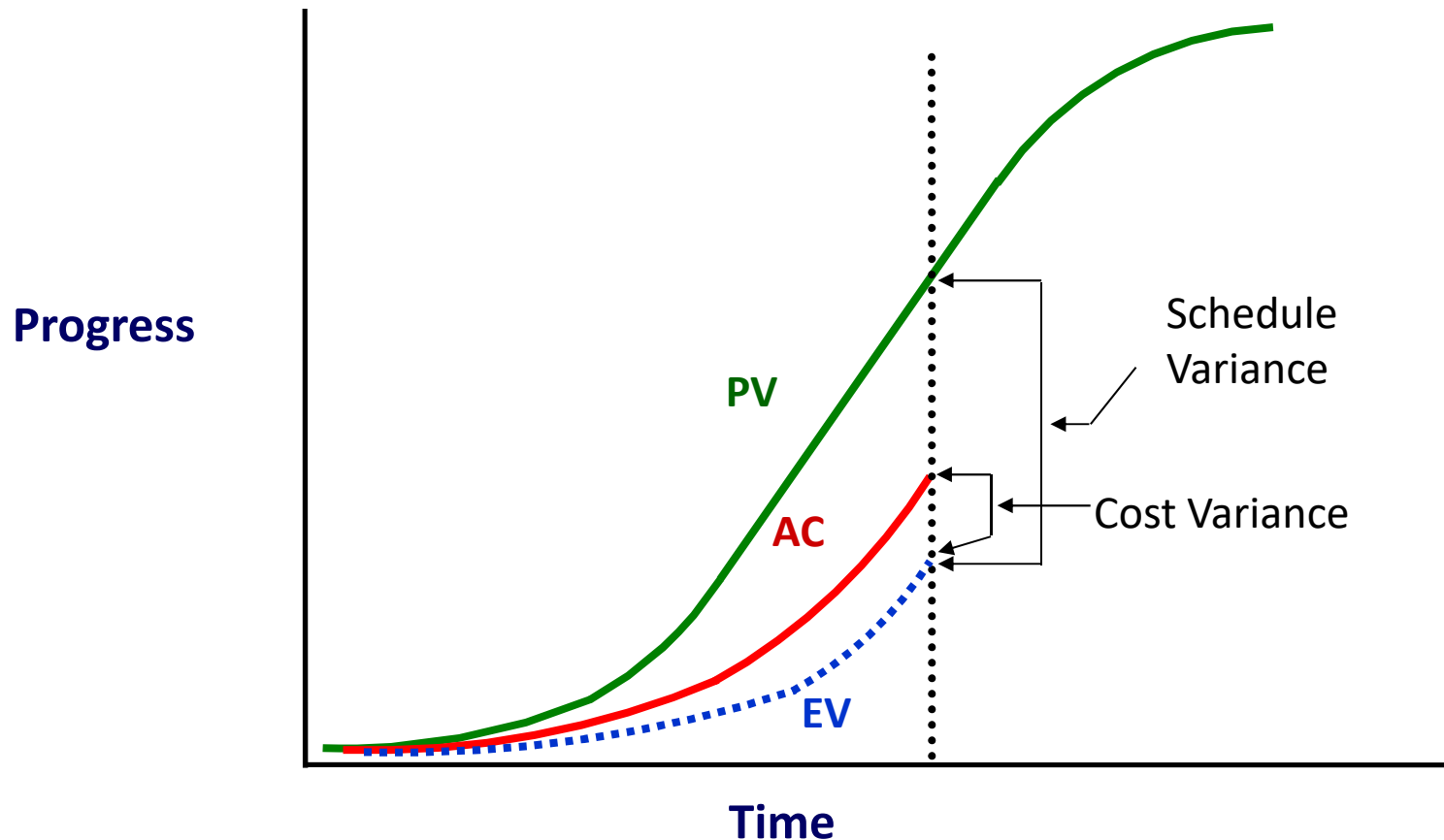
Earned Value – Schedule Variance



How to Measure Earned Value



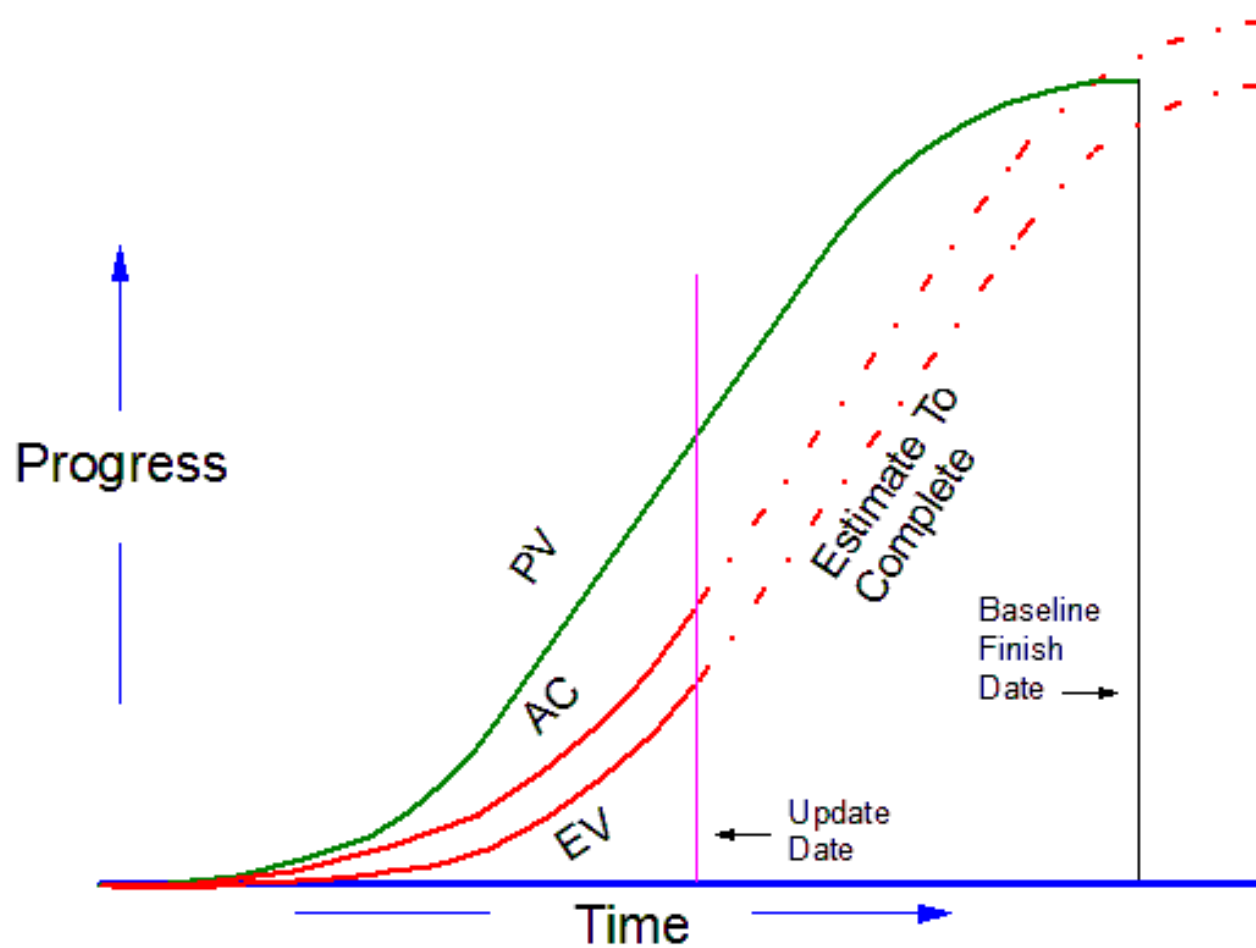
Earned Value – The Full Story



- Underspent because all of the work that was scheduled has not been completed.
- Comparing the EV curve to the AC curve → overspent for the work that was done



Earned Value – PV, EV and AC curves



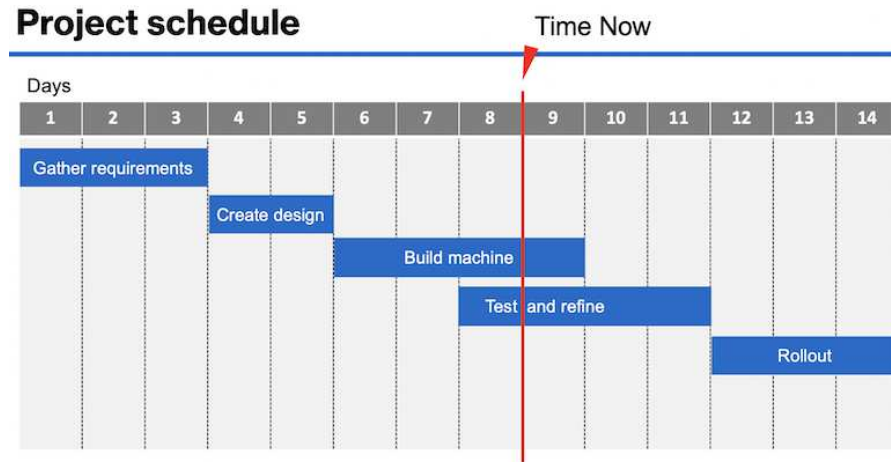
- Extrapolate the completion of the project

Earned Value Analysis Calculations

- Earned Value (EV), Actual Cost (AC), Planned Value (PV)
- Cost Performance Index (CPI) = EV/AC
 - >1 is good, <1 means project is over budget
- Cost Variance (CV) = $EV - AC$
 - Negative value indicates we are over budget.
- Schedule Performance Indicator (SPI) = EV/PV
 - tells you how far off schedule you are
 - <1 means the project is behind schedule
- Schedule Variance (SV) = $EV - PV$
 - The negative value indicates a delay.



Earned Value Analysis Example



Activity	Effort (days)	Cost per day	Total cost	Actual % Complete	Actual Cost	Earned Value	CPI (EV/AC)	Cost Variance (EV-AC)	SPI (EV/PV)	Schedule Variance (EV-PV)
1. Gather requirements	3	800	2400	100%	2400	2400				
2. Create design	2	600	1200	100%	1500	1200				
3. Build machine	4	900	3600	50%	2700	1800				
4. Test and refine	4	700	2800	25%	700	700				
5. Rollout	3	500	1500	0%	0	0	0.84	-1200	0.87	-900
	Planned Budget			At the end of day 8						



Maintaining the Issues Log - 1

- ID Number
- Date logged
- Description of the problem
- Impact if not resolved
- The problem owner
- Action to be taken
- Status
- Outcome



Maintaining the Issues Log - 2

- You can use 3rd party tools or keep the log on a word/excel document.
- While creating reports, try to visualize the status instead of displaying a list of query results.
 - Even if your issue database can have many fields, just use the ones related to your report.
- Keep a close eye on the issue log.
 - Better to review/evaluate on a weekly basis.



Defect Prioritization

- During integration and system verification testing, the defect reports received need to be prioritized.
- Use project milestones as the first deadline for fix
- For further resolution, use priorities to get extra granularity
 - E.g. A defect gating Release Cut milestone with Priority 1 should be fixed immediately. A P3 defect can be fixed later or can be delayed to later milestones based on consensus.
- Defect prioritization should be based on a consensus
 - Periodic triage meetings: “**triad**”
 - Representatives from design, test, project owner, customer, field support should be present.



Issue Log Example

Chromium Embedded Framework / cef

Issues

Filter by: **All** Open

Advanced search

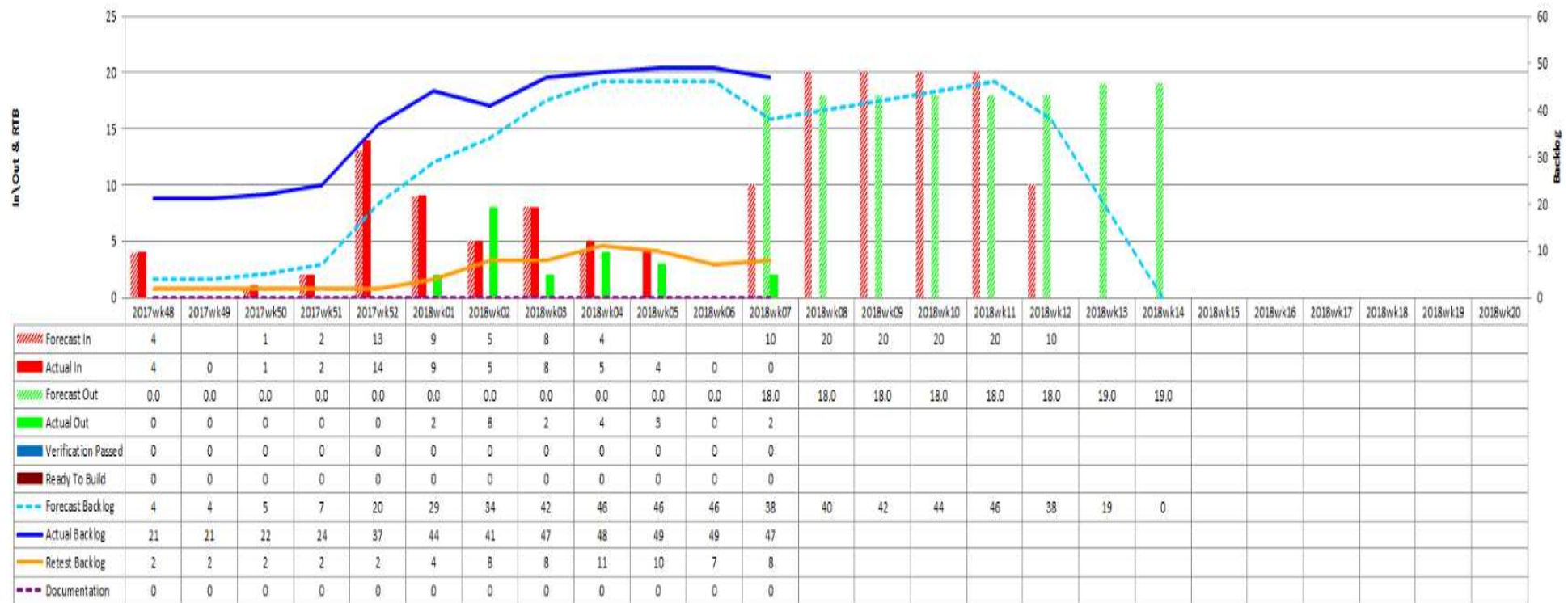
Issues (1–25 of 2,419)

Title	T	P	Status	Votes	Assignee	Created	Updated
#2383: Add text selection changed handler	Framework	🟢	RESOLVED			2018-02-07	15 hours ago
#2420: Nvidia drivers cause trashed/blurry gfx with CEF-based programs (Chrome, etc.)	Framework	🔴	DUPLICATE			4 days ago	4 days ago
#2399: Some launches of CefDOMNode::SetElementAttribute method not tracked by JS DOM Mutation Observer	Framework	🔴	WONTFIX			2018-03-12	5 days ago
#2418: Spell checking service not working in cefclient	Framework	🔴	NEW	2		2018-04-02	5 days ago
#2419: cef 3359 build failure on osx 10.12 / xcode8.3 browser_compositor_view_mac.h:33:16: note: unimplemented pure virtual method 'DestroyCompositorForShutdown' in 'MacHelper'	Unclassified	🔴	RESOLVED			2018-04-03	2018-04-04
#2415: chrome://system crash with --disable-extensions	Framework	🔴	RESOLVED			2018-03-29	2018-04-03
#2416: patch/patches/webui_2037.patch out of date? memory_details.cc:260:13: error: use of undeclared identifier 'switches'?	Unclassified	🔴	DUPLICATE			2018-04-01	2018-04-03
#2417: CefDOMNode::SetElementAttribute with empty string for value parameter	Framework	🟡	NEW			2018-04-02	2018-04-02
#2400: Scroll wheel becomes non-functional with OSR	Framework	🔴	NEW	1		2018-03-13	2018-03-31
#1059: Cef3: Multi-touch support with offscreen rendering.	Framework-Ha...	🟢	NEW	49		2013-08-29	2018-03-30
#2414: when GlobalUseGPUCanvas := true - not painting drowser in fmx	Unclassified	🔴	INVALID			2018-03-29	2018-03-29
#2402: After upgrading from CEF 57 to 63 load command is not executed synchronously	Unclassified	🔴	WONTFIX			2018-03-18	2018-03-29
#2384: Add focused node changed handler	Framework	🟢	WONTFIX			2018-02-07	2018-03-29
#2373: Crash when setting cookies via cookie manager	Framework-Ne...	🔴	NEW	2		2018-02-01	2018-03-29
#2411: Remote Debugging not working with latest cef builds	Framework	🔴	WONTFIX			2018-03-27	2018-03-29
#1984: Momentary "white flash" with OSR in cefclient on a browser's first page load	Framework-Ne...	🔴	CLOSED	4		2016-09-01	2018-03-29
#2275: Empty Username Not Accepted in AuthCallback::Continue	Framework	🔴	RESOLVED			2017-10-02	2018-03-29
#2269: Views + hide frame or views + cefsimple = no visible window	SampleApps	🔴	NEW			2017-09-21	2018-03-29

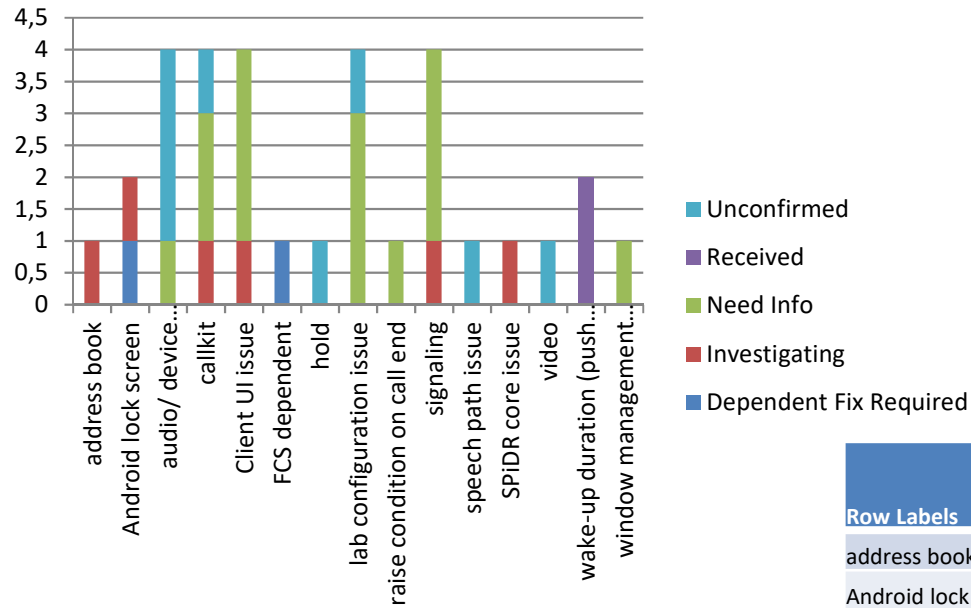


Incoming vs. Fixed Issue Report Example

Defect management plan profile for a release milestone



Issue Report Example



Row Labels	Dependent Fix Required	Investigating	Need Info	Received	Unconfirmed	Grand Total
address book		1				1
Android lock screen	1	1				2
audio/ device management			1		3	4
callkit		1	2		1	4
Client UI issue		1	3			4
FCS dependent	1					1
hold					1	1
lab configuration issue			3		1	4
raise condition on call end			1			1
signaling		1	3			4
speech path issue					1	1
SPiDR core issue		1				1
video					1	1
wake-up duration (push notification)				2		2
window management issue			1			1
Grand Total	2	6	14	2	8	32



Project Meetings

Are you lonely?

Tired of working on your own?
Do you hate making decisions?

HOLD A MEETING!

You can –

- See people
- Show charts
- Feel important
- Point with a stick
- Eat donuts
- Impress your colleagues

All on company time!

A black and white line drawing of a meeting. A man in a suit stands on the right, pointing with a stick at a chart on a screen. Two other people, a woman and a man, are seated at a table on the left, looking at the chart. The chart has a title 'NEW PROJECT' and a line graph showing an upward trend. The man at the table is writing in a notebook.

MEETINGS

THE PRACTICAL ALTERNATIVE TO WORK



Types of Project Meetings

- Team meetings
- Project status meetings
- Problem resolution meetings
- Project review meetings

Frequency
Length
Purpose
Team Room



Team Meetings

- What is your purpose?
 - Problem definition and resolution, scheduling work, planning, discussing situations that affect team performance, and decision making, ...
- How often? How long?
 - Varies according to the length and size of the project
- Who should attend?
 - The entire team needs to participate.
- Do we need an agenda?
 - A template agenda is useful
- Are there minutes? Who takes them? Who gets them?
 - Important part of project documentation
 - Task may be rotated among team members



Managing Project Status Meetings

- Who Should Attend?
- When Are They Held?
- What Is Their Purpose?
 - To get information to the whole team
 - To encourage the free flow of information
- What Is Their Format?
 - Always define an agenda and inform attendees beforehand
- Distribute minutes of the meeting later
 - The minutes should also contain the list of attendees, a summary of comments made, and assigned responsibilities.



The 15 Minute Daily Status Meeting

- Entire team or Task Managers
- Only reporting on tasks open for work and not yet done
- Everyone stands up
- Rotate the meeting facilitator (optional)
- Status of each task is reported
 - I'm on plan
 - I am x hours behind schedule but have a plan to be caught up by this time tomorrow
 - I am x hours behind plan and need help
 - I am x hours ahead of plan and available to help
- Update Scope Bank
- Update Issues Log



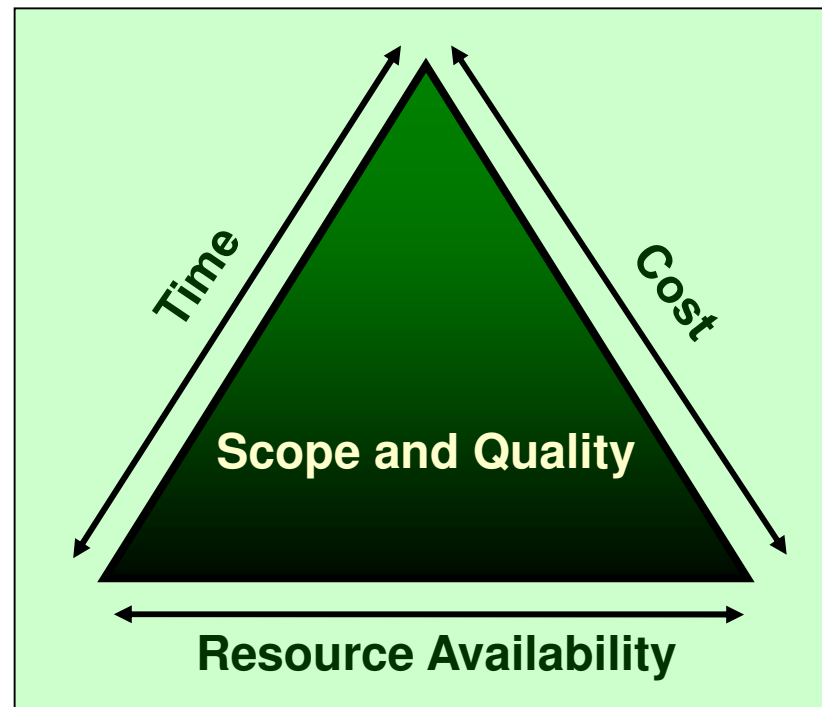
Problem Management Meeting

- Only attended by those involved in the problem
- Agree on problem
- Agree on who owns the problem
- What is the resolution?
 - Brainstorm solutions
 - Prioritize solutions
- When will it be completed?
- Update Issues Log
- Schedule next meeting



Problem Escalation Strategies – Who Controls What?

- Late shipments from suppliers, equipment malfunctions, sickness, random acts of nature, resignations, priority changes, errors, ...



Problem Escalation Strategies

- Project Manager-Based Strategies
 - No action required. Problem will self-correct
 - Examine dependency relationships
 - Reassign resources
 - Use available slack
- Resource Manager-Based Strategies
 - Negotiate additional resources
- Client-Based Strategies
 - Negotiate multiple release strategies
 - Request schedule extension



Escalation Strategy Hierarchy

- No action required (schedule slack will correct the problem)
- Examines FS dependencies for schedule compression opportunities
- Reassign resources from non-critical path tasks to cover the slippage.
- Negotiate additional resources
- Negotiate multiple release strategies
- Request schedule extension from the client



Project Review Meetings

- Held at project milestone events
- Project review panel
- Formal presentation of project performance to date



Conference Calls

A CONFERENCE CALL
IN REAL LIFE



Conference Call Etiquette

Participants

- Treat a conference call like any other meeting, and arrive on time.
- Identify yourself when you first enter the conference call, and before you speak. If there are a large number of participants, some may not know your voice, and identifying yourself will help to avoid misunderstandings.
- Never put a conference call on hold. As with a face to face meeting, you should give a conference call your undivided attention.
- If you absolutely need to step away from the call, let someone know that you are away from the phone so they can speak up if you are addressed.
- Suspend your Call waiting function.
- When addressing someone, use their name to ensure that you have their attention.
- Avoid using acronyms.
- If using a speakerphone, put it on mute when you aren't speaking to the attendees so that they don't hear background noise. Remember to turn off mute before speaking.

Moderator / leader

- Set ground rules at the beginning of the conference. For example, you can request that participants state their name before speaking.
- Introduce each participant in the conference call, especially if there are newcomers or external participants.



Guidelines for Managing Meetings - 1

- Before the Meeting
 - Is the meeting necessary?
 - Determine the purpose of the meeting
 - Set the ground rules for the discussion
 - Determine who really needs to be present and only invite those people
 - Make notes and rehearse your presentation
 - Start and end the meeting on time



Guidelines for Managing Meetings - 2

- During the Meeting
 - Specify a time limit and stick to it
 - Identifying the specific objectives
 - Gather input from the participants
 - Keep things moving
 - Use visual aids
 - Periodically summarize the results of the discussion in terms of consensus achieved or disagreements still in progress
 - Assign action items to team members



Guidelines for Managing Meetings - 3

- After the Meeting
 - Time, place and instructions for the next meeting
 - Time and place of the meeting and list of attendees with their project role
 - Agenda items discussed
 - Decisions reached or held for further studies
 - Action items and persons responsible for follow up and reporting back to the team at the next meeting



How to Close a Project

- Activities of Closing Process Group
 - Verifies that the defined processes are completed as appropriate, and formally establishes that the project or project phase is complete
- Obtain acceptance by the customer or sponsor to formally close the project or phase,
- Conduct post-project or phase-end review,
- Record impacts of tailoring to any process,
- Document lessons learned,
- Apply appropriate updates to organizational process assets,
- Archive all relevant project documents in the project management information system to be used as historical data,
- Close out all procurements activities ensuring termination of all relevant agreements,
- Perform team members' assessment and release project resources.



Tools, Templates & Processes Used to Close a Project

- Acceptance Test Procedure (ATP)
- Implementation strategies
- Documenting the project
- Post-Implementation audit
- Final project report



Steps to Closing a Project

- Get client acceptance of deliverables.
- Ensure that all deliverables are installed.
- Ensure that all documentation is in place.
- Get client sign-off on the final report.
- Conduct a post-implementation audit.
- Celebrate success.



Why Do I Need Client Acceptance Procedures?

- Acceptance criteria must be clearly defined
- Criteria defined during project planning
- Avoid 11th hour disputes

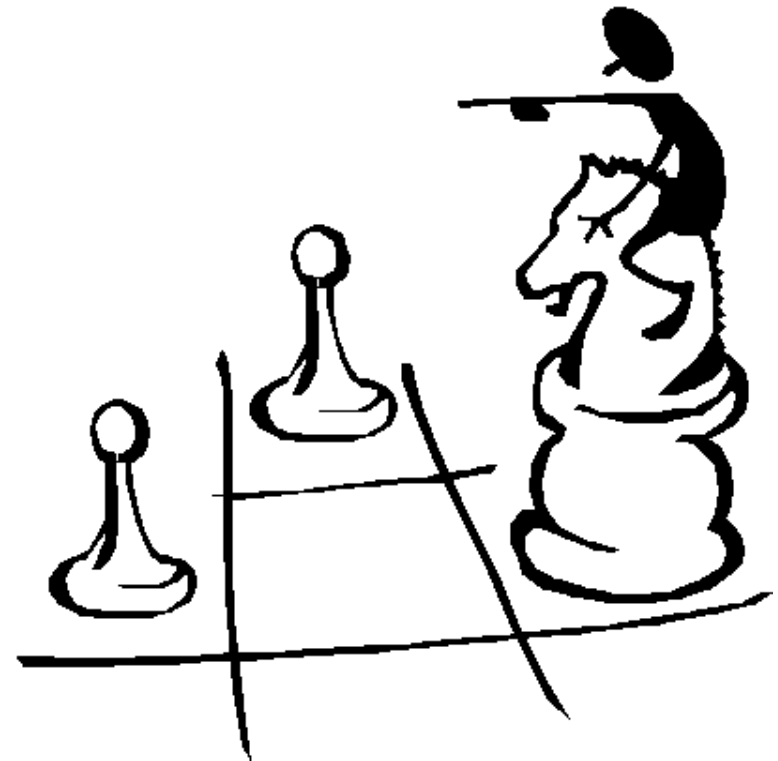
- The criteria is defined in collaboration with the client.

- The criteria is administered by the project team during final acceptance testing.



Installing Project Deliverables

- Phased Approach
- Cut-Over Approach
- Parallel Approach
- By Business Unit Approach



Documenting the Project

- Why do you need to write documentation?
 - Reference for future changes in deliverables
 - Historical record for estimating duration and cost on future projects, activities and tasks
 - Training resource for new project managers
 - Input for further training and development of the project team
 - Input for performance evaluation by the functional managers of the project team members



Documenting the Project – The Project Notebook

- POS
- RBS and all revisions
- Proposal and backup data
- Original and revised project schedules
- Minutes of all project team meetings
- Copies of all status reports
- Design documents
- Copies of all change notices
- Copies of all written communications
- Outstanding issues reports
- Final report
- Sample deliverables (if appropriate)
- Client acceptance documents
- Post-implementation audit report

NOTE:
Start the project notebook on the first day



Conducting the Post-Implementation Audit

An evaluation of the project's goals and achievements measured against the project plan, budget, deadlines, quality of deliverables, specifications, and client satisfaction.

- Was the project goal achieved?
 - Does it do what project team said it would?
 - Does it do what client said it would?
- Was the project work done on time, within budget, and according to specification?
- Was the client satisfied with the project results?
- Was business value realized?
 - Check success criteria
- What lessons were learned about your project management methodology?
- How well did the team follow the methodology?



Lessons Learned

- What did the team and the client learn about doing the project?
 - Not about finding a scapegoat but rather focuses on identifying and learning from mistakes
- Can provide a powerful development opportunity
 - Improving future project performance requires not only avoiding repetition of past mistakes, but repeating what worked well.
- The most effective way to remember is to embed lessons learned to existing standard processes and procedures.
- Don't skip this step!



Gathering What You Learned

- Meetings dedicated to lessons learned
- Prepare an agenda; set a time limit; schedule the meeting; invite the attendees; and distribute materials like status reports and issues beforehand.
- Afterward, prepare a lessons-learned report and follow up on action items.
 - Describe the lesson and include pertinent details.
 - Adding keywords to categorize lessons makes them easier to find later.
 - If action items arise, like updating the project plan template, add them to the lessons learned database and your to-do list.



Lessons Learned Meetings

- Ask open-ended questions—questions that don't invite one-word answers. E.g.
 - What would you do differently next time?
- Ask each attendee about her experiences.
- For mistakes, focus on the problem.
 - Ask questions like, “How can we improve our procedures?”
- You may need a method for providing anonymous feedback.



Lessons Learned Example - 1

- What went well

Item (Prioritized)	What went well	Action Plan	Prime
1	Team collaboration was excellent	Keep it up!	All
2	TM team was very responsive, worked extra hours	Keep it up!	TM
3	On site visit by TM during acceptance testing was very valuable to make progress and alignment	Repeat this for next release. Include on site presence by TM at lab during critical phases in project plan.	Jane
3	Technical debug sessions via collab/skype was very helpful	1. Formalize regular 'debug' session into schedule as pro-active measure vs. re-active scheduling 2. Recommend using collaboration tool earlier in development cycle for "hands on" sharing of technology / code / end behaviour	John
4	Project sync meetings work well when they were frequent and regularly attended by key stakeholders	Find right frequency of scheduling project meetings - but need to ensure all stakeholders are regular attendees to make them effective. Frequency of meetings to increase as get closer to milestone or if # outstanding issues reaches high threshold	John
5	TM technical background was good level	Keep it up!	TM



Lessons Learned Example - 2

- Improvement Opportunities

Item	Category	Problem Statement	Quantify Impact	Action Plan	Prime
1	Requirements	Late engagement by R&D team into project, didn't spend enough time to review and fully understand requirements	High. Lead to misunderstanding and general lack of effective planning / debugging until understood the domain better	Identify project stakeholders early on and hold requirements review.	Don
2	Requirements	Some requirements were missed / added late (e.g. Windows 10) and generally needed more detailed requirements captured and tracked	High. Schedule impacts / delays due to churn and knock on effects. High level requirements lead to mis-understandings	1. Implement requirements management mode of operation. Close requirements at certain phase and handle churn mechanism to control release schedule/code base. 2. Refine requirements at start where it is too high level.	John Andy
3	Requirements	Hard to track / manage requirements in Google Docs spreadsheet	Medium. Error prone.	1. Move to Jira Agile. Done	Jane



Lessons Learned Example - 3

- **What didn't go well:**
 - Deadlines/milestones are missed with huge shifts from the initial estimate
 - No proper list of 3rd party content
 - No formal method of tracking for items that need to go to release notes.
 - **Improvement:**
 - **Action Owner:**
 - **Forecast:**
- **What we would do different if we had started over:**
 - Design/test teams need to go over requirements lists and understand each case. Acceptance test cases should be created after this. If it is not clear, it needs to be discussed with PLM team beforehand.
 - Too many meetings: Sometimes teams hardly find time to work on issues discussed on meetings. It may not be possible to get rid of most of them since most things to be discussed and fixed immediately.
- **What can we do different in the future:**
 - It is better to have a 2 week gap between component software milestones.
 - Fixing in a hurry is no good. Design needs to understand the problem and related use cases to cover everything.



Reasons for not doing a post-implementation audit

- Managers don't want to know
- Managers don't want to pay the cost
- It's not a high priority
- There's too much other scheduled work to do



Tying Up Loose Ends

- Transitioning resources
 - Make sure that people have completed everything you need for your project, and that their managers know when to line up their next assignments.
- Any contracts written for your project (with the project customer, vendors, subcontractors,...) must be closed.
 - Perform the steps required to close and get sign-offs on all contracts.
- Project financial accounting typically doesn't end right away.
 - Keep the books open for a while so you can handle project expenses that show up later.
 - Take whatever steps you need to with the accounting department so no one can charge additional hours to the project.



Final Project Report

Acts as the memory or history of the project

- Executive Summary
- Overall success and performance of project
- Organization and administration of project
- Techniques used to accomplish results
- Strengths and weaknesses of the approach
- Recommendations
- Appendices
 - POS
 - WBS
 - Resource Schedule
 - Change Requests
 - Final Deliverables
 - Other



What to Do with Project Information

- Archive project information in a way that's easy for people to find and access.
- You may have to hand it off to other groups.
- Some typical documents that operations teams need:
 - Final specs, as-built drawings, product documentation, and so on. This information gets reused as support teams develop maintenance procedures, marketing produces brochures, and manufacturing retools the assembly line.
 - Test results. Read-me files for software programs, for example, usually include a list of existing problems and workarounds developed based on tests that didn't completely pass.
 - Status and list of unresolved issues. If customers purchase software maintenance, unfinished features or unresolved issues may be the beginning of the next software release.
 - Location of archived project documents.



Celebrating Success

- Recognition for project team
- Don't pass up an opportunity to show the team your appreciation.



Summary

- **Project Status Reports:** Establish a reporting system that keeps you informed of the many variables that describe how the project is proceeding as compared to the plan.
 - Use graphics wherever possible.
 - Frequency depends on project needs
 - Gantt Charts, Exception Report – Stoplight Reports, Burn Charts, Cumulative Reports - Milestone Trend Charts, Earned Value Analysis
- Maintaining the Issues Log
- Project Meetings : Purpose, duration, attendees, agenda, minutes
 - Use the Guidelines for Managing Meetings
- **Project closure** verifies that the defined processes are completed as appropriate, and formally establishes that the project or project phase is complete.
 - Get client acceptance of deliverables.
 - Ensure that all deliverables are installed.
 - Ensure that all documentation is in place.
 - Get client sign-off on the final report.
 - Conduct a post-implementation audit.
- **Lessons Learned:** Improving future project performance requires not only avoiding repetition of past mistakes, but repeating what worked well.
 - Focus on identifying and learning from mistakes, don't find a scapegoat.
- Tying Up Loose Ends
- Final Project Report acts as the memory or history of the project
- Archive project information. You may have to hand it off to other groups.
- **Celebrating Success:** Don't pass up an opportunity to show the team your appreciation.



References

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