

EXPERT SERIES

The “Expert Series” is a collection of articles, papers and writings by PM Solutions’ associates and other industry experts that provides insight into the practice and value of project management.

Tracking Team Performance *Twenty-four processes to help you stay on track*

by Julie Arnold, PMP

In today’s economic turmoil, with companies reorganizing, laying off employees and closing their doors, it is imperative that performance standards are met to achieve the bottom line to sustain success and to demonstrate the value that team members and leaders bring to the organization. Regardless of whether the performance standards are for software projects, new product development, or construction of a new facility, the underlying theme is the same: How do we know if we have achieved success? Without tracking to an overall goal and performance standards it is difficult to know.

We do know that projects never operate in a vacuum; however, when individuals are concerned only about their own employment status, team performance may suffer. To reach project success, each participant needs to clearly understand the performance standards and tracking methods, and how they apply across all team members and even across all similar projects.

Below are processes for examining performance and gauging team activities required to ensure successful tracking; these processes have been proven in numerous types of projects.

Key Activities

The project manager/program manager in conjunction with the team will carry out activities in six key areas on the project:

- 1. Communicate the Project Goal.** Setting the stage for agreed upon and clear project goals, deliverables, measurement, tracking frequency, and report status.
- 2. Prepare Schedule.** Analyzing activity sequences, activity durations, and resource requirements to create or modify the project schedule.
- 3. Set Up Tracking Tools.** Determining the project-specific procedures that will be used to collect and track the actual progress data.
- 4. Schedule Baselines.** Baseline compares actual progress to original expectations and is an agreed upon plan for monitoring project performance. Baselines allow the project team to be clear on project components and provide consistency for changes. Project components included in baselines are time, scope, cost, and quality. Baselines are a recommended project management approach.
- 5. Monitor Progress.** Identifying how team members and/or subject matter experts should record, report, and submit progress information. This also includes monitoring time and effort. The Project Schedule should be updated as needed.
- 6. Report Progress.** Determining ways to identify progress. Depending on the size of the schedule, specific activities, or number of resources, the schedule progress may be reported using a variety of methods, (i.e., percent complete, work remaining, or estimated finish dates). Remember to document any revised baseline dates.

Activity 1

Communicate the Project Goal

The establishment of a goal is one of the most important processes an individual team should perform. It gives the team a sense of direction and brings the individual members together for a common purpose. The goal gives the team a reference point. They can measure their progress and their success, based on where they are in relation to reaching the goal. (Greg Hendrix, *The importance of goals to the success of*

work teams, Center for the Study of Work Teams, 1996.)

Process 1: The project manager or program manager should convey the project goal, document it in the Project Plan and present it to the team and key stakeholders in the Project Kickoff meeting.

Comment: *Communication during the kickoff meeting must be open and facilitated by an experienced project manager familiar with diverse teams and differing learning styles. This is where experience, attitude, and communication of the project manager set the stage for the project.*

Process 2: Review individual team performance factors and expectations of deliverables.

Comment: *Meet with each team member to convey how and when individual performance will be measured and tracked. This will align the project performers with the overall goal. The reporting periods, forms, and tools should also be reviewed to ensure consistency within the team.*

Activity 2

Prepare the Schedule

Process 3: Create or modify the schedule. Organize the schedule in phases and align appropriate milestones and tasks underneath.

Comment: *When using scheduling tools such as MS Project or Team Play, the schedule should include estimated hours, effort, or duration for tasks along with the assigned resource. Another way to create a schedule is to start with deliverables as a framework instead of phases. Instead of organizing around Initiating, Planning, Executing, Controlling, Closing (or the System Development Lifecycle Phases), you might organize around Assessment, Concept, Requirements, Design, Development, Testing, Documentation and Training, Deployment, and Postdeployment.*

Process 4. Determine calculation method of tracking progress and communicate to the team.

Comment: *Some calculation methods you may choose to employ include:*

- *Percent complete of the total work*
- *Work remaining in days*
- *Incremental milestones (%)*
- *Estimated finish dates based on milestones*
- *Cycle or response times*
- *Software metrics, such as source statements, function points, software defects and problems, or the physical source of lines of code*
- *Man-hours (100ft x 1hr = 100hrs)*
- *Units completed (4,000 m / 10,000 m = 40%)*
- *Cost ratio method*
- *Earned value method.*

[Editor's note: For more about metrics, earned value, and financial measures, see previous issues of People On Projects and our sister publication, The ProjectManagement Best Practices Report.]

Activity 3

Set Up Tracking Tools

Process 5: Document the project number and project name.

Comment: *Once the project name and number is determined, the project name should remain consistent throughout all documents in the project database tool, files, and the project repository.*

Process 6: Set up the tool to align with the project schedule and modify as needed.

Comment: *Either use phases or deliverables and set up any prework, such as standard status reports or team schedules, based upon roles.*

Process 7: Communicate to the appropriate team members how to list progress (work/effort and time) per phases in the tracking tool and to reference the project number.

Comment: *Contracted vendors' time tracking may need to be set up in a different format. For example, a budgetary spreadsheet tracked to actual work performed to date.*

Process 8: Verify and test that all team members have access to tracking tool.

Comment: *If a tracking tool is not identified, individual and team status reports may be utilized.*

Activity 4 Schedule Baselines

Process 9: Using the agreed upon project scope and associated schedule set the original Baseline Schedule and Performance Measures for the project.

Comment: *Reinforce the Performance Measures in the next team meeting. Ask the team for feedback so that clarity is reached.*

Process 10: Use the original Baseline Schedule for tracking progress of the planned vs. actual activities.

Comment: *The Original Schedule Baseline is used unless changes are formally accepted.*

Process 11: If a major approved change occurs, re-baselining may be appropriate.

Comment: *Recommend documenting on the schedule the revised baseline date. This would include budget file name and date that the revised baseline is tied to. If using Team Play, MS Project or other scheduling tools, prior to re-baselining save the current baseline as the original.*

Process 12: Communicate the Schedule Baseline to appropriate team members, including stakeholders.

Comment: *Distribute the baselined schedule to the project stakeholders and team.*

Activity 5 Monitor Progress

Process 13: Verify work/effort and time of team members.

Comment: *Verify weekly status against work/effort performed and track budgetary dollars. Verify timesheets if applicable for hour amount charged to project.*

Process 14: Collect progress (actual work to date).

Comment: *Submission may be weekly/bi-weekly, dependent on project duration. Depending on co-location, this may happen during a status meeting, individual team member reports, or Web collaboration. Activity progress updates should be sent to the project manager or delegate based on the agreed upon standards of the project. Example: percent complete, phases, etc.*

Process 15: Update actual progress on the schedule.

Comment: *Track progress weekly or biweekly, as appropriate.*

Process 16: Compare actual work against planned work.

Comment: *Schedule comparison ensures the project remains on target by assessing modifications. Account for schedule variances in the Status Reports.*

Process 17: Changes in scope, schedule, assumptions, and resources should be approved in the schedule.

Comment: *Approval from the program manager and/or project sponsor and others may be necessary depending on thresholds.*

Process 18: Modify the schedule based on issues or change requests on the schedule progress.

Comment: *Document change activities and dates as necessary. If a major milestone or deliverable end date is affected, a Change Request or another approval level may be needed.*

Process 19: Communicate changes in the schedule to team members.

Comment: *Distribute or publish the revised schedule to the project stakeholders and communicate any impact on scope.*

Process 20: Review the schedule at the beginning of each phase or deliverable. Produce an updated schedule and budget. Review with the project team and stakeholders.

Comment: *Meet mid-way through the project or as needed to determine whether the project's activities are meeting the timing objectives, quality standards and performance measures of the project. This may be formal or informal.*

Activity 6

Report Progress

Process 21: Verify that the individual performance is aligned with the team performance goals.

Comment: *Briefly review the individual goals and expectations against the project goal to ensure consistency. If individuals are working on their own agendas and not the team goal, then conduct the appropriate interventions such as coaching sessions outlining the overall vision of the project. Remember that people have different learning and intake styles. A different approach may be needed; visual depiction vs. verbal description of the project goal.*

Process 22: Determine the frequency of updates to manage the schedule and document this information in the Communication Plan. Advise the appropriate stakeholders to the level or schedule reporting.

Comment: *The frequency of updates to the schedule can occur weekly, bi-weekly, or as deemed necessary.*

Process 23: Prepare required reports and review with appropriate participants depending on control interval.

Comment: *This ensures that the work efforts of the team(s) are aligned to the current planned activities and are tied to the budget estimations. Top line reports at a minimum include:*

- *Key accomplishments*
- *Key decisions*
- *Plans for next reporting period*
- *Open issues.*

Additional information to include:

- *Snapshot of the schedule vs. baseline*
- *Budget summary*
- *Major milestones dashboard.*

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Process 24: Continue to monitor and give feedback to the team as the project progresses.

NOT EVERY ONE of the 24 processes listed above needs to be followed exactly; rather the six key activities set a framework to ensure that the team success is achieved through proper communication and systematic tracking. According to Jon Katzenbach and Douglas Smith, in *The Wisdom of Teams*, a team is "... a small group of people with complementary skills who are committed to a common purpose, performance goals, and approach for which they hold themselves accountable." Use the processes as the framework to set up a system for accountability ... and prove your team's value

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