Launch of the new

Introduction to Project Control

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Background

- Planning SIG launched *Introduction to Project Planning* at APM Conference in October 2008
- Discussions began in Planning SIG about follow-on projects:
  - Guide to project planning?
  - Scheduling maturity model?
  - Planning qualifications?
- Planning SIG members have a particular interest in project control:
  - Because project planning and project control go together
  - Planning defines a project, including control arrangements
  - Difficult or impossible to control without a plan
- No specific APM publication about project control
- So perhaps a project control publication…?

What *Is* Project Control?

- "Project control" is often referred to….
- ….and it seems that it must be a project management activity….
- ….but it's not even defined in the 5th Edition of the APM Body of Knowledge!
- Many disciplines, processes and techniques *are* defined in BoK and other APM publications
- Project control must be in there somewhere!
- But what *is* it…?

Thoughts About Project Control

- Projects are unique, transient, risky *and unstable*:
  - Project plans are imperfect and projects deviate from them
  - Problems arise and small variances can become large
  - Project objectives are therefore threatened
- So project control is required:
  - *Monitoring* is not enough
  - Variances from plan must be identified *and corrected*
  - Use "closed loop" control, based on feedback
  - Need to be proactive, not just reactive – use "feed forward" from one project to the next
- Need to control all aspects of a project:
  - Scope
  - Quality, time and cost
  - Risks
  - Problems and issues etc.
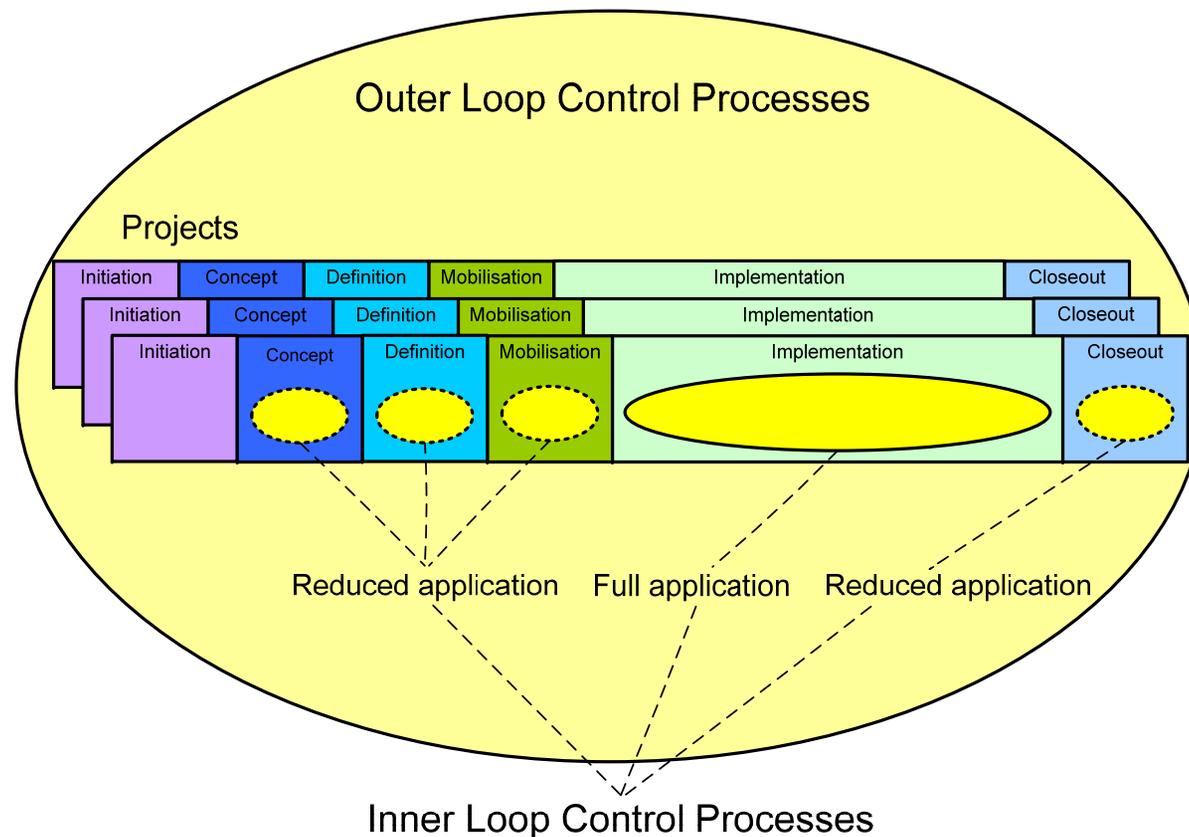- So perhaps project control involves *multiple* processes?

Thoughts About Project Control (continued)

- There's a *spectrum* of project control
- At one end: mostly reactive, high frequency, relatively informal
- At the other end: more proactive, lower frequency, more formal
- Blending from:
  - "Pure" project control via programmes and portfolios to business level
  - Operational via tactical to strategic
  - "Control" to "management"
  - "Doing the project right" to "doing the right project"
  - "Inner loop" to "outer loop"

"Inner loop" processes   "Outer loop" processes

Inner Loop & Outer Loop Control

- Inner loop control: mostly within the project, by the project team, depending of life cycle phase
- Outer loop control: around multiple projects, involving stakeholders outside the project team, throughout the project life cycle

Outer Loop Control Processes

Projects

| Initiation | Concept | Definition | Mobilisation | Implementation | Closeout |

Reduced application   Full application   Reduced application

Inner Loop Control Processes

What Are The Project Control Processes?

- Introduction to Project Control identifies ten control processes

- In approximate "innermost" to "outermost" order:

Inner loop processes:

- Performance Management

- Risk Management

- Issue Management

- Review

- Change Management

Outer loop processes:

- Quality Assurance

- Life Cycle Management

- Continuous Improvement

- Portfolio/Programme Management

- Governance of Project Management

Notes

- Control of quality, time and cost linked together as *Performance Management*:
    - Earned Value Management is a powerful Performance Management *technique*
- Quality Management is decomposed into its constituent processes:
    - Quality Planning is part of project planning
    - Quality Control classified as an inner loop control process
    - Quality Assurance and Continuous Improvement are classified as outer loop control processes
- The following are much more than control processes:
    - Portfolio Management
    - Programme Management
    - Governance of Project Management

(Identified as outer loop processes in order to address their contributions to project control)

- Other project management processes are "non-control" and/or "doing the work"

Hence the Introduction to Project Control:

- Contributors: Ken Sheard (Planning SIG chair), Neil Curtis (lead author), Jenn Browne, Andrew Chillingsworth, Martin Eveleigh, Guy Hindley, Allan Jones, Mike Semmons, Simon Springate, Thanos Tsourapsas and Paul Wasket
- Integrating control-related topics from Body of Knowledge 5th Edition and other APM publications:
  - New context for established processes
  - Some refinements (e.g. project life cycle)
  - Some new material (e.g. inner & outer loop control; life cycle management)
- Introduction-level document:
  - Broad but not deep
  - Referring to other APM publications for details
- Should be of interest to those new to project management
- Hopefully of interest to planning and control practitioners and to the project management community in general
- An imperfect first attempt at defining project control

Scope and Contents

- What is project control?
  - Spectrum of control
  - Inner & outer loop processes
- Why control?
  - To maximise chances of project success
- When to control?
  - Throughout the project life cycle
- Who controls?
  - The roles of project stakeholders
- How to control?
  - Description of the control processes
  - Significance of the project management plan
- Characteristics of good project control

Characteristics of Good Control

- Should look to the past:
  - To immediate past performance – to identify and correct variances
  - To previous projects – to avoid the same mistakes
- Should look to the future:
  - Trends, forecasts, estimates at completion; risk management
  - Aim to avoid problems rather than fire fighting
- Is more than just *monitoring*:
  - Monitoring alone won't correct variances
  - Effective action must be taken – closed loop control
- Is dependent on an appropriate organisational culture:
  - Challenging but supportive
  - Effective sponsorship
- Depends on an organisational infrastructure:
  - Obtained through experience and investment
  - A vital asset to organisations performing projects

Definitions of Project Control

- Narrow definition:
  - "The application of processes to measure project performance against the project plan, to enable variances to be identified and corrected, so that project objectives are achieved."
- Wider definition:
  - "The application of project, programme and portfolio management processes within a framework of project management governance to enable an organisation to do the right projects and to do them right."
- Project control ensures both *doing projects right* and *doing the right projects*

Summary

- Projects need control because they are unique, transient, risky and unstable:
    - Variances will grow if not corrected
- Key points:
    - Projects use a spectrum of control
    - Project control uses multiple, inter-related processes
    - There are inner loop and outer loop control processes
    - Control is closed loop – identify variances and act on them
    - The project management plan is vital – defines "the plan" and "the management"
- Project control uses processes and techniques from the whole of project management
- Introduction to Project Control integrates the control processes in a single APM publication

Any Questions?