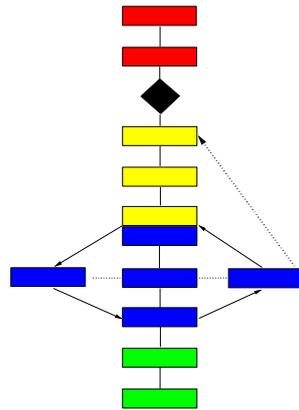


Progress Review Guide

MITP
v5.1



Document Number MICG1REV

Edition Notice
First Edition (September 1995)

This edition applies to Version C5.0 of Managing the Implementation of the Total Project (MITP), and to all subsequent releases and modifications until otherwise indicated in new editions.

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PREFACE About This Document

This document contains advice, checklists, and examples to help you hold project progress reviews.

For information about the MITP life cycle, the key techniques, and the support techniques, see the MITP Handbook. A glossary of terms can be found at the back of the MITP Handbook.

Who Should Read This Document

The 'you' in this document is the Project Manager, but other people can read and extract useful information from it.

How to Use This Document

The table of contents provides a clear roadmap to the main topics outlined in this document.

The progress reviewing procedure is contained in Part 1 of Project Control Book Guide.

ISO9000 Control Information

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1 Progress Reviews

Reviews are essentially a mechanism for communicating inside and outside the project. Within the project team they create a sense of ownership and awareness, and outside they provide reassurance that the project is moving to plan and that issues are addressed.

Progress reviews are held at regular intervals and attended by project personnel who contribute to the reporting or decision making.

You should determine the frequency of progress reviews according to the needs of the project at the definition phase and specify this frequency in the project management system.

You should hold at least two types of review:

- Project Manager's review
Chaired by you, and involving the Subproject Managers and other key working members of the project.
- Project Sponsor's review
Chaired by the Project Sponsor and involving you and other senior managers with a day-to-day interest in the current stage of the project. Its content is less detailed than your meeting and is concerned primarily with policy and strategy.

If a project board is established for the project, it would meet with similar objectives to the Project Sponsor's review.

Subtopics

- 1.1 Review Types
- 1.2 Why Review Progress?
- 1.3 Who Should Attend Progress Reviews?
- 1.4 When Should You Hold Progress Reviews?
- 1.5 How Is Progress Reviewed?

1.1 Review Types

There are four major types of review:

- Project review board's (or steering committee's) review
- Project Sponsor's review
- Project Manager's review
- Subproject Manager's review.

How they are used and their frequency is decided during project definition when the project management system is formulated.

1.1.1 Project Review Board's Review

1.1.1.1 Chair

Project Sponsor.

1.1.1.2 Participants

Steering committee members or appointed deputies with decision-making powers.

1.1.1.3 Objectives

The objectives of the project review board review are to:

- Understand and agree current project plan and its consequences, for example, on schedules, costs, resource needs
- Marshal the necessary resources of the required quality
- Be made aware of decisions required over the next few weeks and who will be consulted
- Confirm planning assumptions about the business environment and enterprise objectives
- Formally approve the project deliverables so far, for example, requirements report or implementation plan
- Resolve disputes or conflicts
- Direct you on any changes to project objectives or priorities.

1.1.1.4 Frequency and Length

Monthly to quarterly depending on the state or stage of the project. Length between one and two hours.

1.1.1.5 Inputs

- Agenda (agreed with chair)
- Previous meeting minutes
- Your presentation
- Progress report distributed to attendees in good time before the meeting.

1.1.1.6 Typical Subjects for Discussion

- Business environment changes
- Costs and budgets
- User expectations
- Resource requirements.

1.1.1.7 Subjects Not Suitable for Discussion

Current issues, because it is not sensible to discuss only those issues that happen to be current when the committee meets. If certain issues are to be discussed by the committee, they should be selected because they need discussion, not because they came up in a certain week.

1.1.1.8 Outputs

Minutes.

1.1.2 Project Sponsor's Review

1.1.2.1 Chair

Project Sponsor if necessary, but essentially an informal meeting.

1.1.2.2 Participants

- Project Sponsor
- You
- Other senior managers with a day-to-day interest in the present stage of the project.

1.1.2.3 Objectives

The objectives of the Project Sponsor review are to:

- Update the Project Sponsor on project status, including a summary of the current and new issues
- Agree on the manager responsible for each new issue
- Approve any changes of plan you propose
- Confirm your mutual agreement on the way the project is progressing, or, if you don't agree, for the Project Sponsor to initiate resolution.

1.1.2.4 Frequency and Length

Depends on your relationship with your Project Sponsor. You can have short, frequent meetings, for example, half an hour every week, or longer, less frequent meetings, for example, between one and two hours every month. In either case there should be a channel for immediate escalation of high-priority issues.

1.1.2.5 Inputs

- Previous meeting minutes
- New and overdue issues
- Summary report with issues.

1.1.2.6 Typical Subjects for Discussion

- New and outstanding issues
- Your action plan to maintain schedules
- Personnel concerns
- Politics, communications within the enterprise, other inhibitors to you doing your job.

1.1.2.7 Outputs

Minutes.

1.1.3 Project Manager's Review

1.1.3.1 Chair

You.

1.1.3.2 Participants

- You
- Subproject Managers
- Other key project members for example, systems architect, project office manager.

1.1.3.3 Objectives

The objectives of the Project Manager's review are for:

- The attendees to understand progress of work across all areas of the project and optimize short-term plans
- You to understand problems facing each area and agree plan to resolve if possible
- You to take responsibility for escalating unresolvable problems as issues.

1.1.3.4 Frequency and Length

Normally weekly, maximum two hours.

1.1.3.5 Inputs

- Minutes of previous meeting (action list)
- Progress data from planning and tracking systems for each subproject, for example, milestone charts, expected inputs to subproject in next three to four weeks
- Summary report from each Subproject Manager
- Issue, risk, and change status for each subproject.

1.1.3.6 Typical Subjects for Discussion

- Deployment of resources
- Use of facilities
- Mismatches between progress in various subprojects
- Projected milestone dates
- Potential issues.

1.1.3.7 Subjects Not Suitable for Discussion

- System design alternatives
- Detail on problems only affecting one subproject.

1.1.3.8 Outputs

- Immediate minutes with agreed problem resolution actions, should be taken away by participants - don't wait for typing.
- Your summary report to the Project Sponsor, including:
 - New issues list
 - Progress against plan at the top level
 - Projected milestone dates.
- Something visible to all project members, possibly an edited version of the above summary.

Notes:

1. Issues should not wait for the meeting. Any obvious ones should go up the chain without delay.
2. On a large project, individual subprojects might hold a similar team review before the Project Manager's review, so that the subproject manager is up-to-date on your team's progress and problems.
3. About every month, you should extend your summary report into a highlight report for managers not concerned with the project on a day-to-day basis. These might include the steering committee, managers of other departments with an interest, and project assurance people. The report, which should be very brief, might have headings and sample contents such as:
 - Good news (milestones met, successful tests, hardware installations).
 - Bad news (milestones missed, major changes required).
 - Issues (unresolved or long-lived, not today's problem).
 - People (individual successes, joiners, leavers).

1.1.4 Subproject Manager's Review

1.1.4.1 Chair

Subproject Manager.

1.1.4.2 Participants

- Subproject Manager
- Team leaders
- Other key project members for example, systems architect, project office manager.

1.1.4.3 Objectives

The objectives of the Subproject Manager's review are for:

- The attendees to understand progress of work across all areas of the subproject and optimize short-term plans
- Subproject Manager to understand problems facing each area and agree plan to resolve if possible
- Subproject Manager to take responsibility to escalate unresolvable problems as issues to project meeting
- Subproject Managers to report progress at the task level and to discuss concerns with the schedule
- Review issue and risk status
- To raise problems and agree an action plan to resolve
- To analyse change requests and report as required

1.1.4.4 Frequency and Length

Normally weekly, maximum one hour.

1.1.4.5 Inputs

- Minutes of previous meeting (action list)
- Progress data from planning and tracking systems for the subproject, for example, milestone charts, expected inputs to subproject in next three to four weeks
- Issue, risk, and change status for the subproject.

1.1.4.6 Typical Subjects for Discussion

- Deployment of resources
- Use of facilities
- Dependencies and progress on other subprojects
- Projected subproject milestone dates
- Potential issues.

1.1.4.7 Outputs

- Immediate minutes with agreed problem resolution actions should be taken away by participants; don't wait for typing.
- Subproject Manager's summary report to you, including:
 - New issues list
 - Progress against plan at the subproject level
 - Projected subproject milestone dates
 - Something visible to other Subproject Managers: possibly an edited version of the above summary.

Notes:

1. Issues should not wait for the meeting. Any obvious ones should go up the chain without delay.
2. On a large subproject, individual teams might hold a similar team review before the Subproject Manager's review, so that the team leader is up-to-date on your team's progress and problems.

1.2 Why Review Progress?

No project ever runs completely to the original plan. You will always encounter issues, changes to the scope or schedule, and risks. You use various disciplines to monitor these areas and use reviews to confirm that the project is under control.

The benefits of 'getting it right first time' are well documented. Failure to deliver a product that conforms to requirements results in schedule and cost over-runs.

Progress reviews provide an efficient mechanism above the level of task management to ensure progress on a regular basis. They should address:

- What has been achieved to-date against what was planned
- Everyone knows what actions have to be taken to bring achievement back to plan
- Things that are impeding the progress to plan are raised as issues
- Problems - understanding and managing them
- Changes to plans - discussing and agreeing them
- Project completion - to time to instill confidence.

If progress is not reviewed, issues can remain unresolved, effort and deliverables may not be on time, leading to:

- Lack of resources when required
- Slippage of delivery dates
- Missed major milestones, or
- Project failure.

You can hold quality and assurance reviews to assure the Project Sponsor and other line managers that the project will meet its objectives. See Quality Management Guide for more information.

Who Should Attend Progress Reviews?

As a general rule, you should attend all reviews, except at Subproject Manager's reviews when your presence is optional.

Having identified who should attend the various types of review, it is important to ensure that these people do not make a habit of sending deputies. The reviews will always produce actions and you will lose the effectiveness of the review if you cannot assign the action to the person with prime responsibility for that area of the project.

It may be the first time that an individual in a client organization has been asked to attend this sort of meeting and may feel anxious or uncertain about what is expected. You should identify this situation before the first review and give appropriate education and guidance.

1.4 When Should You Hold Progress Reviews?

Project reviews can be either at regular intervals, for example, weekly or monthly depending upon their formality, but can also be called at key points.

They should fit in with the client's management system and company culture. However, you must decide what review process is required and demonstrate its value to the client management team.

1.4.1 Identifying the Project

Not applicable unless running this as a project in its own right.

1.4.2 Establishing the Project

- Meet with the Project Sponsor to agree on progress review meetings and content
- Tailor standard procedures to suit project structure and culture
- Hold first set of meetings to include explanation of the review procedures
- Produce first sets of minutes and reports using agreed format.

1.4.3 Managing the Project

- For each review meeting:
 - Prepare agenda from standard format, adding any additional items and distribute
 - Prepare any material for the meeting
 - Hold the meeting to schedule and content
 - Document the meeting with a standard set of minutes
 - File documents in the standard manner.
- For the review cycle:
 - Ensure meetings are scheduled in advance
 - Don't change the dates unless absolutely necessary
 - Ensure minutes are distributed in a standard manner, to arrive in time to action items, usually one to three days
 - Review the review process to ensure it matches what is required and modify if necessary.

1.4.4 Ending the Project

Hold a project completion workshop, usually linked to the publication of the project completion report.

Workshops meaning quality control processes, often involving people outside the project organization, to:

- Check estimating and planning assumptions
- Evaluate effectiveness of project control methods



- Assess risks of not meeting objectives
- Provide an expert opinion on performance and availability projections.

1.5 How Is Progress Reviewed?

1.5.1 Communication Styles

Reviews are essentially a mechanism for communicating inside and outside the project. Within the project team they create a sense of ownership and awareness, and outside they provide reassurance that the project is moving to plan and that issues are addressed. Consider the following four complementary styles of communication:

Personal Informal

Important interactions are face to face, largely verbal, set up as necessary. Much information gathering is similarly set up as necessary - 'keeping an ear to the ground'. Meetings can be arranged at anyone's initiative and attendance is composed of those with relevant contribution. There is documentation, but it is largely 'for the record' or to meet statutory needs, and it usually follows the meetings.

Personal Formal

Again face to face and verbal, but taking place in constituted boards, committees and task forces. Many have a standing membership, regular meetings and support staff. Formal presentations are common, often using visual aids. Other detailed documentation may be generated in support of or to meet formal needs, much of it retrospectively.

Written Formal

Important interactions are started through papers, memoranda, proposals, submissions, and minutes. Meetings are held, but they tend to be explanatory, supportive or 'rubber stamping' in intent, the substantive work having been in the exchanging of documents and in written comments on them. Meetings follow the papers which are produced to a calendar and have established distribution and sign-off procedures.

Written Informal

Important interactions occur through electronic mail or paper, but form is less important than content. Letters and memos are the commonest forms of communication. Face-to-face communication does take place, but serves mainly a social purpose such as emphasizing a caring or responsive attitude.

1.5.2 Developing a Review Approach

Consider each of the following communication styles when developing a review approach for your project:

- Be sensitive to the corporate culture and style
- Two opposite styles can often be used in a complementary manner
- Most importantly, communicate somehow, and too much is better than too little.

1.5.3 Managing the Review

The following indicates the sort of activities that have to be performed either by you, or on your behalf. These will vary according to the type of review but will be agreed by the chair.

Suggested agenda items:

- Actions from last meeting
 - Go through action minutes of last meeting to verify all actions completed or agreement to carry forward.
 - Achievements this month
 - Run through list of completed items on project plan. Be sure that each has completed successfully and any deliverable has been accepted by the person responsible for the follow-on activity.
 - Failures this month
 - Examine each activity that should have completed and forecast new completion date. Decide whether this is acceptable (in project plan) and minute appropriate actions by date and by whom.
 - Achievements required in next month
 - Review all activities due for completion in the next month and forecast dates. You should have confirmed these before the meeting. Any slippages or likely noncompletions should be discussed and actioned as above.
 - Activities due to start in next month
 - Review all activities due to start in the next month and forecast dates. You should confirm these dates before the meeting. Any slippages or late starts should be discussed and actioned as above.
 - Project schedule concerns
 - Review any concerns with the project schedule. This is mainly to give confidence in the completion date of the project as predicted by the schedule. Produce new versions of the plan from time to time.
 - Change management
 - Review and authorize changes to the project that require this level of agreement. You should understand consequences of effect of change and implications if rejected. A change log should be reviewed here reflecting the decision. The communication of change decisions is your responsibility following the meeting.
 - Problem and issue management
 - Review all outstanding problems and issues and action plans. This can be done from a problem log. Discuss new problems and issues, decide an action plan (including by whom and by when), and add it to the log. You should track and chase progress of the actions.
- Preparation for the meeting:
 - Produce an agenda
 - Check room, coffee, and so on, booked
 - Decide who takes the minutes
 - Copy and distribute necessary information, for example, plans
 - Organize room, overhead projector, flip charts, pens
 - Choose your seat
 - Arrive early.

- Running the meeting:
 - Agree on who is taking minutes and when they will be distributed - need to be available within one to two days
 - Agree agenda items, add any others under any other business
 - Take items in the agenda one by one:
 1. Lead the discussion of each item
 2. Identify actions, who will do it and by when
 3. Ensure decisions are recorded in the minutes separately from the actions
 4. Ensure important information is recorded separately from the actions, unless it will be written up as a special document
 5. Summarize actions after each agenda item before moving on.
 - Actions from the last meeting:
 - Try and close as many as possible
 - Be firm with people who persistently take no part.
 - Keep an eye on the time and stop discussions not relevant to progress, for example, technical detail, problems.

Where necessary institute appropriate meetings to resolve technical problems or other items that do not require the full group.

- Keep the action list to a minimum but ensure nothing is omitted
 - Agree date of next meeting.
- Documenting the meeting:
 - Record those present, absent, and apologies
 - Update actions from last meeting with new information, dropping those completed, with explanation, if necessary
 - Record decisions made by the meeting
 - Record information from meeting, where applicable, in a concise manner (keep it short, people will not read page after page of minutes)
 - Detail each action and summarize in the action log
 - Add to whom minutes are copied, in addition to attendees
 - Produce minutes and current action log
 - Distribute within one to two days of meeting
 - File in project control book.



2 Project Health Check

Subtopics

- 2.1 Introduction
- 2.2 Objectives
- 2.3 Method
- 2.4 Conducting the Health Check Review
- 2.5 Potential Review Difficulties

2.1 Introduction

A project health check is an effective and efficient technique for assisting a reviewer in establishing the health of a project.

There are three main areas which are investigated and reported on:

- Project status
- Issues
- Risks

The prime value that is added is formulating the action plans necessary to either keep the project on track if it is a healthy project, or to bring it back on track if it is not healthy.

2.2 Objectives

The objectives of the project health check are to:

- Determine the current status of a project
- Identify the key issues and risks that may prevent the project meeting its objectives
- Agree initial actions and assign responsibility for all issues
- Agree containment actions for all risks
- Communicate the project status to the key players
- Provide an independent view of the project.

2.3 Method

In outline, once you have agreed the terms of reference with the Project Sponsor:

- Collect data
- Analyze data
- Plan the reviews
- Check project health
- Document results
- Present to the Project Sponsor.

2.4 Conducting the Health Check Review

You organize a one-day review to:

- Modify and agree status
- Identify and action all key issues and risks.

2.4.1 Review Attendees

- The project reviewing manager
- The key user representatives
- You
- Key members of the project team
- An experienced project consultant as facilitator.

2.4.2 The Formal Review

The review should be led by the facilitator who will:

- Outline the agenda for the day
- Lead the discussion
- Seek a consensus on the status
- Log on flip charts all key issues and risks identified
- At the end of the review, lead an action planning session on the issues and risks.

2.4.3 After the Review

The status, issues, risks, and action plans should be formally documented and a summary of the day prepared and presented to the Project Sponsor with any recommendations at the executive level.

2.5 Potential Review Difficulties

- Project team don't understand the questions
- Time consuming to collect data
- Too little data
- Too much data
- Unstructured data
- Unstructured project often leads to unstructured review.

Bear these points in mind when negotiating the terms of reference for a project health check. If you suspect that it could take an extended period to collect the data, or to get it into a useable form, then perhaps the information should be obtained by means of interviews. A lack of structure in the project should be identified before the review takes place and the Project Sponsor warned.



3 Project Audit Review

Subtopics

- 3.1 Introduction
- 3.2 Objective
- 3.3 Conducting the Audit
- 3.4 The Auditor
- 3.5 Project Master File

3.1 Introduction

The project audit review is designed to be used in situations where a member of executive management has requested a comprehensive view of a project. This is usually as a result of the project giving rise to concerns about its progress. However, there are other reasons why an audit can be requested, for example, the need to introduce major change part way through a project, for example, solution, personnel, costs, or timescale.

3.2 Objective

Although the audit is concerned with the conformance to standards and good practices, the prime objective is to establish the current status of the project, and how it achieved that status. In fact, you are recommended to build up a history of business and project events during the audit and include this as part of the final report.

3.2.1 Purpose

The purpose of a project audit review is to determine if:

- The scope, plans, objectives, and budgets are defined and mutually compatible
- Appropriate plans exist and are being followed
- Organization, controls, and technical management are adequate
- Appropriate skills and facilities are assigned
- Status of user relations is good and organization for handling user contacts is adequate
- Technical work is acceptable
- Responsibility for solving known problems has been clearly assigned
- The project is making maximum contribution to the technological objectives of the organization to which it belongs
- Adequate plans exist for terminating the project or obtaining follow-on work.

3.3 Conducting the Audit

You present the project documentation as a starting point of the audit. The duration should be approximately two to three hours. One of the benefits of the presentation lies in the preparation, as all kinds of useful information about the project tends to be uncovered.

Note the following points:

- It is helpful to the auditor to have access to the project documentation before the presentation, however, in a situation where documentation has not been kept in line with progress, you may feel defensive and reluctant to give access. Also this form of review can be completely alien to the culture in some organizations and can lead to some anxiety. It should be emphasized that although the process is formal, the auditor is there to help, not to castigate. You (and the auditor if different) should consider the audit as a team effort and all can help in preparing review material.
- A large project will have a number of Subproject Managers responsible for discrete subsets of the project. You may wish to have them attend the review, or even present their section of the documentation.

After presenting project documentation, have a series of interviews with executive, user, and IT management involved in the project, and any suppliers involved. Wherever possible the interviewees should have their project documentation available at the meeting.

As a guideline, the interviews should be scheduled for two hours but can be extended.

- At the end of the audit produce a report showing the following:
 - The objectives of the audit
 - A description of the way the audit was conducted
 - The conclusions reached
 - Recommendations for action
 - A history or timetable of significant events that have occurred during the life of the project.

Additional topics may be included in the report depending on the particular circumstances of the project under review.

3.4 The Auditor

The audit may be conducted by a single auditor, or review leader, or a team of investigators led by an auditor. However, it is essential that the auditor has extensive experience in two areas: assurance and audit and project management - without this, significant aspects of the project can be missed and incorrect conclusions drawn. The auditor is also responsible for making recommendations for future actions and some of these may well be unpalatable and need justification.

3.5 **Project Master File**

The purpose of the following is to provide you with a guideline for the information that should be contained in a project master file available for review.

- MITP process documentation
- Project plan
- Solution design documentation
- The audit review package (see "Contents of the Audit Review Package" in topic 3.5.1)
- Project management reports, including sponsor reviews and project board reviews
- User progress reports
- Correspondence to and from the user
- Internal IS correspondence
- Project change control documentation
- Improvement request agreements
- Estimates to complete
- Previous project review reports
- Special situation reports
- Special action plans
- Archival copies of deliverables.

All these items may not be present in the project master file. It may be quite significant, for example, that there are no project change requests on a project that has been in progress for eight months. Change is generally inevitable and change activity should be monitored closely. A comparison of the contents of deliverables with the statement of work can sometimes detect a drift in scope, for which change control procedures should have been exercised.

When reviewing the file, the auditor will assess trends and look for the seedlings of problems, for example:

- Potential areas of conflict
- Conditional acceptances of deliverables
- Deliverables outside the scope of statement of work
- Significant omissions
- Frequent reestimates to complete.

Few, if any, projects fail because of insurmountable technical challenges. That is not to say that the technical viability and integrity of a project should not be investigated. It definitely should be. Mostly, however, the contributing factors are associated with management that is, planning, tracking, and control. While no single factor is generally the cause of failure, you should be alert for each of them. Projects should be examined for:

- Schedules that provide no contingency for review and rework
- Schedules that provide no contingency for changes
- Schedules that are optimistically aimed at a calendar objective
- Static implementation plan
- Skills mismatch or unavailability
- Part-time transient team
- Insufficient management involvement

- Inability to say no
- Problems buried until too late to recover
- Lack of formal business environment (see "Project Review Master Question List" in topic 4.0)
- Deliverables with inconsistent level of detail
- Inadequate level of detail for hours remaining
- Hardware, program, and product availability
- Poor user and developer communications
- Poor internal and external communications
- User isolation
- No common understanding of the scope by all
- Oral against written conflicts
- Inability to define what the system must do
- Abandonment of statement of work
- Absence of change control procedures
- Inability to recognize change
- Conditional acceptance and sign-off
- Tendency to implement before design freeze
- Absence of standards (including quality standards)
- No adherence to standards
- Absence of project records protection plan
- Ineffective team organization
- Relinquished project control
- Insufficient second level involvement
- Over-reliance on user people on team
- Undocumented dependencies and assumptions
- Issues not formally managed
- Shifting milestones
- Absence of reviews
- No agreed completion or acceptance criteria for deliverables.

The auditor must also assess:

- Estimates and actuals (man-hours and schedule)
- Communication of true status to user
- Availability of current schedule to user
- User confirmation of satisfactory progress
- Planned completion equals user expectation
- User still believes it is a good investment
- Current approach is adequate to produce expected results
- User is fulfilling the commitments
- User objectives have not shifted since inception
- Project scope is not drifting away from the statement of work
- Unusual approval delays are being experienced
- User Project Manager is the prime interface
- User Project Manager is effective decision maker
- User Project Manager involvement is adequate

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- User Project Manager understands user responsibilities
- User involvement is adequate
- Original assumptions are still valid
- New assumptions are contained within the statement of work.

These points do not cover every conceivable situation, but do provide a starting point. There is no substitute for the mature judgement of an experienced auditor. Ideally, you should also participate as a review team member on other projects to provide the cross-fertilization necessary to the continued viability of the business.

3.5.1 Contents of the Audit Review Package

- 1 General project description:
 - Project title
 - Project type and size
 - Project definition
 - Deliverables
 - Assumptions and dependencies
 - Major milestones
 - Previous project review
 - Special action plan.
- 2 Project environment:
 - Space
 - Furniture
 - Supplies
 - Hardware and software
 - Machine time
 - Support systems.
- 3 Project organization:
 - Organization chart
 - Position description
 - Key position understudies
 - Reorganization plans
 - Significance of project to user business
 - Information exchange procedures
 - Approval procedures.
- 4 Project control:
 - Methods and techniques
 - Internal progress reporting
 - Time estimating and planning
 - Checkpoints
 - Progress review and analysis
 - Support functions.



- 5 Technical approach:
 - Scope
 - Software system
 - Hardware requirements
 - Development productivity technology
 - Standards and conventions
 - Baseline specifications.

- 6 Project plans:
 - Financial plan:
 - Requirements for rebudgeting
 - Resource requirements forecast.
 - Resource plan:
 - Number and skills mix
 - Phasing and rotation of personnel.
 - Work plan:
 - Deliverables
 - Tasks
 - Start and completion dates
 - Individual assignments
 - Activity network or precedence diagram
 - Major milestones or checkpoints
 - Critical path items.
 - Status report plan:
 - Reports to and from user
 - Reports to and from support organizations
 - Reports to management
 - Schedules for report preparation, review, and distribution
 - Major milestones or checkpoints.
 - Documentation plan:
 - Types of documentation to be produced
 - Standards
 - Outlines
 - Preparation and sign-off responsibilities
 - Schedule.
 - Change control plan:
 - Procedures
 - Review and approval responsibilities
 - Communication
 - Change activity to-date.
 - Project records protection plan:
 - Material vital for reconstruction
 - Review schedule
 - Plan for reconstruction.
 - Training plan:
 - Types of training to be provided
 - Preparation and teaching schedule



- Staff responsibilities
- User readiness.
- Education plan:
 - Types of training required by team
 - schedule
 - Activity to-date.
- Quality plan:
 - Standards
 - Reviews
 - Actions.
- Risk plan:
 - Standards
 - Completed risk assessment checklist
 - Analysis of difference between current project environment and original assumptions
 - Contingencies and containments.
- Test plan:
 - Levels of testing
 - Objectives
 - Criteria for completion
 - Preparation, execution, and sign-off
 - Schedule.
- Demonstration plan:
 - Internal project preparation schedule
 - Outline of preparation approach
 - User involvement
 - User review and approval responsibilities.
- Conversion, cutover, and maintenance plan:
 - Schedules
 - User status and readiness for cutover
 - Live data availability
 - User responsibilities
 - IS responsibilities
 - Staffing considerations.
- Project completion plan:
 - Deliverables status
 - User approval and letters of acceptance
 - Systems implementation plan
 - Project completion review schedule
 - Project shutdown plan.



4 Project Review Master Question List

Subtopics

- 4.1 Business Environment Evaluation
- 4.2 Project Definition Evaluation
- 4.3 Project Environment Evaluation
- 4.4 Project Organization Evaluation
- 4.5 User Evaluation
- 4.6 Project Planning and Control Evaluation
- 4.7 Technical Approach Evaluation
- 4.8 Project Operating Plans Evaluation
- 4.9 Work Plan
- 4.10 Status Evaluation

4.1 Business Environment Evaluation

1. Is there a business requirement statement?
2. Is it clear from this why the project was set up?
3. Is there an IT system requirement document?
4. Is it current, comprehensive, and clear?
5. Do these documents provide an adequate base for the project?
6. What other documents provide a basis or authorization for the project?
7. Are all these documents agreed and signed off?
8. Is the project getting the funds and resources that were agreed?
9. Is this a project that must succeed?
10. If the project were to be stopped now, what would the effect be?
11. The aim of a project is usually to provide certain facilities. If the project were to be stopped now, how would such facilities be provided?
12. Are there organizational changes taking place alongside the project? Are they happening according to plan? Is their impact on the project as predicted? If there are issues resulting from this, how are they handled?
13. Is the formal organization structure changing as a result of the introduction of this system? Is this change progressing according to plan?
14. Are there other projects happening within the organization that might impact this project?
15. Does this project depend on the successful management of a number of groups from different companies?
16. Does the project demand that people from different locations work together? How is this managed?
17. Is there a business system solution? Is it written down and understood?
18. Is the total scope of the project documented? Who has read it?
19. Is the total scope of the project consistent with user expectations?
20. Is this a structured, predictable system or is it unstructured and open-ended?
21. If the latter, are the opportunities and constraints fully understood and documented? What steps were taken to ensure that these were fully understood?
22. Has a formal risk assessment taken place and been documented?
23. If yes, how long ago?



4.2 Project Definition Evaluation

4.2.1 Project Definition Documentation

1. Is there a document that defines clearly what the project is?
2. Is it a good top-down view?
3. Does it have authority?
4. Has it been used as the basis for the project work?
5. Has it ever been updated? If so, when and why?

4.2.2 Project Objectives

1. What are the project goals and objectives? Where are they documented?
2. Are they understood by everyone on the project?
3. Are they clear and appropriate?
4. Are they still valid? What means are available to check their continuing validity?
5. Has any drift from the original objectives been detected?
6. Are success criteria defined? Is there a mechanism for developing or refining these within the project?
7. Are key assumptions and dependencies documented and understood by all?



4.3 Project Environment Evaluation

4.3.1 Space and Supply Facilities

1. Are space and supply facilities being provided as required by the project?
2. Are facilities adequate for the performance of the project?
3. If significant problems exist, what known or potential impact is there regarding completion of the project and morale of project staff?
4. If travel is involved, is there any potential for schedule slippage or for personal discontent?

4.3.2 Project Staff

1. Is project staffing consistent with the planned staffing assumptions?
2. Has staffing been completed? If not, what additional skills are being sought?
3. Were letters of commitment regarding personnel availability honored?
4. If there has been a shortfall, has this been reflected in changes to the project plan or commitments?
5. If there are fewer people than necessary, but no change has been made to project targets, how are these targets going to be achieved?
6. How many people are there on the project?
7. How many full time, how many part time? How many providing a service to the project but not really part of it, for example, premises, PC support, communications?
8. If these figures are not readily available or consolidated, how are project costs determined?
9. Does each individual always have a clear plan of what he or she is expected to do in the near future, for example, one to two weeks?
10. Is each person's contribution reviewed regularly? Every week?
11. Does everybody participate in a regular team meeting? At what frequency?
12. How are people kept in touch with project progress?
13. Are people working overtime? In all parts of the project or just some?
14. Is overtime encouraged or discouraged? Is it paid?
15. What percentage of the project effort to-date is attributed to overtime?
16. What percentage of the staff has previous experience in the applications being addressed in the current project?
17. Is additional training required by any member of the project staff?
18. What is the perceived mood of the project team? Is the team enthusiastic?
19. Is the team happy to be working on this project?

4.3.3 Computer Time

1. Are actual computer time requirements consistent with the estimates?
2. What limits, if any, have been placed on the availability of computer time?
3. Where is the computer located?
4. Who operates the computer?
5. Who controls scheduling of computer time?
6. What priority is given to the project's computer time requests?
7. Are bulk data entry facilities available and adequate?



4.3.4 Support

1. What support staff will be required by the project staff?
2. What is the significance of this support?
3. Have the supporting organizations been responsive to the requests of the project staff?

4.4 Project Organization Evaluation

4.4.1 Organizational Structure

1. Is the project organization written down and fully agreed?
2. Does the organization include all members of the project staff?
3. Is the organization known and understood by each member of the project staff?
4. Are there defined contact points with all related projects?
5. Are functions and responsibilities clearly delineated by the organization?
6. If the project organization conflicts with the conventional line organization, have the conflicts been resolved satisfactorily?
7. How has this been done? What working methods are used to overcome any cross-departmental issues?
8. Is the project organization described as working? Is it described well?
9. Some projects are organized as a federation of groups - each group being situated in one reporting line of the company. Is that the case in this project? If so, how is the necessary coordination achieved? How does management drive the project?
10. Does this project involve separate companies working together as owners or sponsors of the project?
11. How do they coordinate their work? What improvements are desirable or possible?
12. Are there suppliers whose work has to be coordinated? How is this coordination achieved?
13. How do suppliers know what they have to deliver?
14. How are contractual responsibilities identified and managed?
15. What are the contractual relationships with other parties?
16. Is the management style of the organization as a whole suited to the level and speed of decision-making that the project demands?
17. How are suppliers being managed? Is it successful?

4.4.2 Rationale for Organization

1. Does the current organization address all major areas of work activity?
2. Is the organization logical and consistent with the job?
3. Does the organization allow for the necessary flexibility in direct communication between project staff members?

4.4.3 Levels of Decision Making Responsibility

1. How is the authority of decision-making delegated to members of the project staff?
2. Is the decision-making responsibility known, understood and performed at the designated levels?

4.4.4 Key People and Responsibilities

1. What are the responsibilities of the key individuals? Where is this documented?
2. Are these responsibilities appropriate for the project?
3. Do the key people have the authority to do their project jobs?

4. Do the key people have sufficient time allocated to the project?
5. Is a director or executive level manager clearly identified as the Project Sponsor?
6. Is the Project Sponsor able to provide the necessary support and guidance?
7. Is there a Project Manager?
8. Is the Project Manager the right person organizationally to be in charge of the whole project?
9. If there is no single Project Manager, how is the work of the project coordinated, managed and driven?
10. Is there a review board or steering committee?
11. What does it do? Is there any way in which it could be made more effective?

4.4.5 Key Position Understudies

1. Should it be necessary, are there logical qualified replacements for the project's lead personnel who could be made available at short notice?
2. To what extent would the loss of any staff member impact the project schedule?
3. Is there personal rotation planned during the period of project performance? If so, is the planned rotation accounted for in project schedules?

4.4.6 Plans for Reorganization

1. If reorganization is being planned, why is it required and how will it be achieved?
2. If reorganization is not planned, will the existing organization satisfy the remaining project activities?
3. Is there a plan to review the appropriateness of the current organization?

4.5 User Evaluation

4.5.1 User Organization

1. Is the project staff aware of the user organization?
2. What levels of the user organization interface with the project?
3. What is the highest level of the user organization that has a known awareness of the project?
4. By the users the real users or a staff group constituted to represent them?
5. If the latter, are the communications between users and user representatives established by the line organization, adequate for the project? What proof of this is there?

4.5.2 Significance of the Project to the User's Business

1. Will the completed project result in changes in the user's organization?
2. Will the new system involve changes to working practices? Do the users believe these being introduced satisfactorily?
3. To what extent will personnel be affected as a result of the completed project? Will they have to learn new skills or adopt new approaches or attitudes? Is this progressing satisfactorily?
4. Are the training and documentation plans likely to meet requirements? Is progress to-date satisfactory?
5. How significant are the scheduled project target dates to the user?
6. Do they know and agree the realistic dates by which they will start to experience the benefits of the system?
7. Do the users understand and endorse the system requirements? How do you know?
8. Do the users understand the real costs of the system and the efforts involved? How has this been described and explained?
9. Are the users prepared to commit resources for testing and training as required?

4.5.3 User Responsibilities

1. What is the significance of the user responsibilities to the performance of the project?
2. Are the user obligations agreed and documented?
3. Is the user fulfilling the obligations to the satisfaction of the project staff?

4.5.4 User Involvement

1. To what extent are user personnel involved in the project? Are they involved at the right levels, and to the right degree? If there are concerns about this, what is being done?
2. Do the users perceive this project as something which is useful and valuable to them?
3. Are the users positive and supportive?
4. Are the users being told about the project and its progress?
5. How are they told and how often?

4.5.5 Information Exchange Procedures

1. To what extent is there a need for information exchange between user and project staff?
2. What procedures exist for this information exchange?
3. How is the user informed of project plans and activities?
4. Are current procedures working to the satisfaction of both the user and project staff?

4.6 Project Planning and Control Evaluation

4.6.1 Planning the Work

1. Is the total work scope of the project identified and documented clearly?
2. Is there a clear and concise statement of the scope and bounds of the work? Where is it documented?
3. Is the work structured, for example, into subprojects? What are they?
4. What estimating processes are used? Are they satisfactory?
5. Are estimates validated? Are they used as the basis for plans?
6. Does each major work element have a specification and a work plan?
7. Is the work plan current for each work element?
8. How frequently are work plans modified, and why?
9. Is all the work being done reflected in the task plans? Are there any cases of people doing work that is not in the plan?
10. Is the overall project schedule reasonable or challenging? Are there any parts that seem particularly demanding?
11. How was the overall schedule confirmed? Was it done after definition, estimating and planning? Or were dates decided by other means, for example, external constraints, assertion, rule of thumb, experience, guesswork?
12. Is there any target date in the project that has to be achieved because of legislation?
13. Are there any target dates that are externally committed?

4.6.2 Internal Reporting

1. Are regular internal reports used on the project? If so, how are they used?
2. For each type of written report, determine:
 - Outline of contents
 - Frequency
 - Author
 - Distribution.
3. How does the project staff conduct internal technical reviews?

4.6.3 Methods and Techniques

1. Are formal project control techniques used?
2. How is progress recorded?
3. How are problems recorded?
4. Are there processes to deal with changes, issues, and risks? Are these processes effective?
5. Who is responsible for these processes?
6. In the past three months, how many changes have been requested: how many changes have been accepted for implementation?
7. How many issues have been raised in the past three months?
8. How many issues are currently outstanding?



4.6.4 Time Estimating and Project Planning

1. To what degree are technical personnel consulted on work schedules?
2. If percent complete is used as a measure of progress:
 - Who makes the estimate?
 - How is percent complete calculated?
3. How is current status used to evaluate project schedules?

4.6.5 Project Checkpoints

1. What milestones have been identified as project checkpoints?
2. How are the checkpoints used for project control?
3. Are the checkpoints clearly defined?
4. Are the checkpoints understood by the user?
5. What significance is associated with the checkpoints such as reassessment of ability to complete within best estimate and appropriate user notification?
6. Is there a review and reporting plan? Where is it documented?
7. What reviews are held? What is the agenda, attendance, frequency and duration of each? What is the output?
8. In what way are these review meetings helpful and productive? Are they important in keeping the project on track?
9. Are plans updated following review meetings?
10. Are the actions arising from review meetings usually carried out promptly and effectively?

4.6.6 Progress Review and Analysis

1. Does the Project Manager have a clear understanding of:
 - Work accomplished against work scheduled?
 - Resources expended against resources scheduled?
 - Ability to complete project within the current best estimate?
2. Can work be described as ahead of schedule, on schedule, or behind schedule?
3. To what extent is the project staff aware of project status?
4. Do the plans at working level make it clear who is doing what when?
5. Have the plans proved to be a satisfactory basis for progress checking?
6. What is the planning horizon? For detailed plans? For high-level plans?

4.7 Technical Approach Evaluation

4.7.1 Scope of Effort

1. Is the scope of the project performance consistent with user expectations?
2. If the scope of work is not all-encompassing, what phases are omitted?
3. Who is responsible for completing the work?
4. Is the user aware of the scope of project performance?

4.7.2 Content and Status of Appropriate Work Phases

1. Is the IT system solution written down and understood by everyone?
2. Are performance, availability and usability requirements defined? On what basis were they defined? Are they understood and agreed by all parties?
3. Is the IT solution breaking new ground? How does the plan cope with the novelty? Are all the necessary skills on board and committed for as long as required? Are they already working? Is there any risk or exposure here?
4. Has the testing plan been prepared? Are there enough people, machines, machine time, time?
5. Are the people, skills and facilities available to operate and maintain the system when it is implemented? If not, what is the plan to achieve this?
6. Is a significant portion of the work contracted out to suppliers? How are the interfaces defined and managed? How is progress controlled? How is quality controlled?
7. What technical assurance processes are being used?
8. Is the cutover from development to live running an integral part of the project? If not, how is it to be managed and coordinated?
9. Is there a mass installation phase or roll-out phase or project? If separate, how is coordinated with the project? Is there a nominated owner?
10. Is the hardware plan - including communications equipment, network, terminals - fully integrated with the project plan? Is there a nominated owner?
11. Is the progression and overlap of the various work phases logical and consistent with project objectives?
12. Is each phase clearly defined in that the beginning, content, and end are described?
13. What phases result in deliverables?
14. What phases have associated checkpoints?
15. Is there a plan for future enhancements?

4.7.3 Software Systems and Features Being Employed

1. Is there a significant application development or software development component in this project?
2. What techniques and processes for application development (AD) management are being used in this case? Are these standard for all AD in the organization?
3. What track record does the organization have in using these techniques and processes?
4. Are formal AD estimating techniques being used?
5. How does the AD planning process work?

6. What types of plan have been produced for this project? How many of them are useful and used?
7. What is the rationale for the choice of software?
8. Is operations aware of the choice and its implications?
9. Has operations the experience and ability to assume maintenance?
10. Is the software being used released? If not, what modifications are being made? Are equipment changes needed and are engineers committed to make the changes?
11. What previous skills exist on the project staff, which are relevant to the current project?

4.7.4 Hardware Requirements and Usage

1. What is the current status of the hardware installation?
2. Is the hardware status consistent with project plans?
3. If on order, are firm delivery dates committed for all components?
4. Is the hardware configuration adequate for satisfactory system performance?

4.7.5 Standards and Conventions

1. What identified standards and conventions are used on the project?
2. What conventions apply to:
 - Writing program specifications
 - Program unit test
 - Program review and sign-off
 - Library management.

4.8 Project Operating Plans Evaluation

4.8.1 General Considerations

1. Is each significant task being performed on the project represented by formal project plans?
2. Is the production of all project deliverables included in project plans?
3. Do the plans allow for measurement of progress?
4. How are the plans used to measure progress?
5. Are the various project plans consistent with one another?
6. Have deviations been identified? If so,
 - What is the significance of the deviation?
 - Has the cause been ascertained?
 - Is replanning required?
 - Will the deviation affect the overall project schedule?
 - Is any special action planned?

4.8.2 System Requirements and Analysis Plan

1. What is the current state of the task with respect to work schedule?
2. What departments of the user organization were included in the study?
3. Were all existing reports and files considered in the design?
4. What new requirements were discovered? Can they be addressed within the project?
5. What design alternatives were considered?
6. Have a sufficient number of alternatives been evaluated?
7. Are performance, availability, and maintainability objectives included in the requirement definition?
8. Are requirements defined to a degree where system and database design can occur?
9. Has the user signed-off on the results of the requirements definition?

4.8.3 System Design Plan

1. What is the current state of the task with respect to work schedule?
2. Is the system design based on a system requirements that the user has approved?
3. Are objectives for the system design clearly defined?
4. To what extent is the user participating in these efforts?
5. What constraints are placed on the design effort because of:
 - Time and scope
 - Standards or conventions
 - Hardware
 - Software.
6. Is the development of program specifications included in the design effort?
7. What procedures have been established for periodic review of the system design?
8. Do the user organizations participate in the review sessions?
9. If complete, are the contents of the final system design report comprehensive enough to allow the program development and implementation work to proceed?
10. Has the design satisfied the defined system database and processing requirements?

11. Is simulation or modelling planned to check out system design performance objectives?
12. Was the database design consistent with stated objectives of growth, access time, response time, retention, security and maintenance?
13. Has the design been validated by an external reviewer?

4.8.4 Human Resources Plan

1. Are numbers and phasing of project personnel consistent with current work plans?
2. Is the skill mix suitable to accomplish the project tasks within the allotted time?
3. What categories and amounts of nonproductive time are accounted for in the project plans?
4. To what extent does project management participate in performance tasks?
5. If additional personnel staffing is still required, what assumptions have been made regarding availability and starting dates?
6. Have the assumptions been tested?



4.9 Work Plan

1. Does the work plan describe work allocation and set measurable objectives?
2. Do the measurable objectives get expressed in terms of milestones and job assignments?
3. Are milestones specifically described by dates and accomplishments or events?
4. What tasks are as yet undefined and/or unassigned?
5. Is a critical path defined?
6. Does the work plan clearly show interdependences of task items?

4.9.1 Status Reporting Plan

1. Does the project have an established schedule for preparation, review and distribution of status reports?
2. Are reports prepared and distributed on schedule?
3. Is progress reported against identified milestones?
4. Do the reports have continuity insofar as treatment of progress and problems are concerned?
5. Do the reports serve as the basis of regular status meetings?
6. Is there any evidence of the reporting cycle affecting project progress?

4.9.2 Test Plan

1. For each level of testing, are the following items clearly defined?
 - Objectives
 - Criteria for success
 - Responsibility for:
 - Test data generation
 - Testing logic
 - Test execution
 - Test result analysis
 - Documentation of results
 - Verification of results.
2. To what degree are simulation and driver program testing techniques used in the testing?
3. How are the test schedules dependent on hardware delivery dates?
4. Is the use of test data included in the test plan?
5. Does the project schedule allow sufficient time for complete execution of the test plan?
6. To what extent does the test plan include provision for retesting and regression testing?
7. What is the current status of test activity?

4.9.3 Documentation Plan

1. Is there a documentary means of recording all outstanding project development activities, and checking that each is started and finished on time?

2. Have specific schedules been established for completion of documentation items?
3. Does the plan include an outline of intent, content and format for each type of documentation?
4. Are there procedures for review and sign-off and do they include involvement by the technical group leaders?
5. Has sufficient time been allotted in project schedules for preparation of documentation?
6. What specific items of documentation are included as project deliverables?
7. Does a plan for retention of project documentation exist? If yes, what is included and who is responsible for filing and maintenance?
8. Does the review and sign-off procedure assure proper quality control?
9. Is the preparation of documentation on schedule?
10. Is there a central repository of all project documentation?

4.9.4 Conversion, Cutover, and Maintenance Plan

1. Are cutover plans and schedules consistent with other components of the project schedule?
2. What are the cutover criteria?
3. Is the method of system implementation consistent with estimating assumptions?
4. If parallel operations are involved, what criteria exist for the cut off of the old system?
5. Are the fallback and recovery procedures defined and workable?
6. Is there a test plan for them?
7. Are the following functions prepared for cutover:
 - Computer operations
 - Programming staff
 - User.
8. Are service level agreements in place with support functions?
9. What, if any, performance guarantees have been given to the user?
10. Upon completion of a functional demonstration and delivery of the system to the user, what are the project's remaining responsibilities?
11. What is the significance of a delayed cutover date?

4.9.5 Training Plan

1. Does the training plan include the following information:
 - Schedule of classes
 - Types and number of personnel to be trained
 - Scope of training effort
 - Amount of effort required.
2. Do project schedules allow adequate time for preparation of training?
3. Have individual assignments been made for preparation and class instruction? If yes, are the assignments consistent with current workloads and technical experience?
4. If training is to be based on completed written materials such as program documentation, will the material be available on schedule?
5. What is the intent of the training? Is training consistent with having a user that is capable of operating the system?
6. Is the user prepared to receive training?

7. Is the user satisfied with the training approach?

4.9.6 Financial Plan

1. To what degree is the current budget consistent with estimating assumptions?
2. Are current projections of expenditure for manpower, travel, computer time, services and supplies reflected in the budget?
3. What, if any, expense items are not included in the operating budget?
4. Who prepares financial reports against the budget? Is the Project Manager aware of the current status?
5. Are there plans to advise the user on the status of the project with respect to completion within the best estimate price?

4.9.7 Change Control Plan

1. Does a change control procedure exist for the project?
2. Is the change control plan consistent with the project environment?
3. Is there mutual agreement between the project and the user on:
 - Definition of changes
 - Baseline for changes
 - Processing of changes
 - Approval responsibility for change requests.
4. Who can initiate a change request?
5. How are changes analyzed?
6. Are changes evaluated in terms of impact on work schedules, level of effort, and price?
7. Is a priority system used to classify changes?
8. If change requests are deferred, who is responsible for their handling?
9. Is the change control procedure based on a formal user or project agreement?
10. Does the project or the user take responsibility for the decision to implement a change?
11. Is there a complete record of all change requests processed to-date?
12. Is a summary of change requests status included in the appropriate progress reviews?
13. Must all initiated system changes be completed before the project is concluded?
14. Are implemented changes to be included in the functional demonstration?

4.9.8 Risk Plan

1. Is there a completed risk assessment checklist? When was it completed?
2. Are the risks regularly reviewed and assessed?
3. Is there a risk containment analysis? Is this regularly reviewed?
4. Who is responsible for managing the project risk? Have any elements of risk been delegated and to whom?

4.9.9 Quality Plan

1. What standards and procedures are in place? Are there any which should be in place but are not available?
2. What reviews are taking place? Are they effective?
3. Who is responsible for ensuring adherence to standards?
4. Is there a process of ongoing improvement?

4.9.10 Functional Demonstration of Acceptance Test Plan

1. Who is responsible for the preparation of the plan?
2. Is the user to participate in the development of the plan?
3. Does the user have the responsibility for approving the plan?
4. Who is responsible for the execution of the plan?
5. Is the plan based on a system design or functional specification report?
6. What is the schedule for execution of the plan?
7. How is the demonstration to be performed?
8. Is the demonstration or test to include system performance capabilities?
9. What is the potential exposure to the project if the test is not completely successful?
10. How will repeat testing be handled if it is required?

4.9.11 Records Retention Plan

1. What is included in the plan?
2. Does the plan include all significant original material?
3. Is the procedure for reconstruction reasonable and complete?
4. Does the procedure include an estimate of the cost of reconstruction?
5. Is the plan consistent with major project milestones?
6. Is the plan being complied with?
7. Is the plan reasonable in the light of project size and complexity?
8. In what records retention center are the project records maintained?
9. If materials reproduction or storage supplies (disk, tape, cards) are involved, how is the cost handled?

4.9.12 Project Completion Plan

1. Does the user have related requirements that are not being fulfilled under the current project?
2. Is the user aware of the approaching project completion date?
3. Has a mutually acceptable completion date been established?
4. What project deliverables remain to be completed?
5. What outstanding issues or questions remain to be resolved?
6. Will the user be satisfied at the completion of the project?
7. How will this be evaluated and documented?
8. Has the Project Manager scheduled an end of project review with the user?
9. How is personnel reassignment being handled?

4.10 Status Evaluation

1. Is the project on schedule?
2. If not, why not?
3. Has any delay been agreed with the user?
4. Are milestones being met?
5. Have all the milestones so far been met on the date originally planned?
6. If not, what is being done about it?
7. If a milestone is missed, how is the situation reviewed, by whom, and who decides what to do?
8. Is the current plan in your area up-to-date?
9. Is the current project plan a consolidation of the most up-to-date lower-level plans?
10. Are there procedures to review the timescale and revise estimates in the light of performance and changes to planning assumptions?
11. Are there any procedures to gauge the accuracy of the estimating criteria used?
12. Is the project within budget for development costs?



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Readers Comments

MITP
Progress Review Guide
Version C5.0

Publication No. MICG1REV

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