



Everyone's Smart  
University

# Global Project Management

## Lecture 4

PMG 661

Global Communication Techniques

# Collecting information from the global team members

The different locations and organisations participating in a global project can have diverse methods and tools to gather information about time, cost and project performance. The program or project office may need to define manual or automated processes to combine the information available in different formats, to produce consolidated reports and performance summaries. This is not an easy task, and sometimes it is not even possible to find similar information items across various time tracking and financial systems.

# Collecting information from the global team members

Global projects will benefit from a standard method, to be used by all project team members, when recording the time spent for each work package and when reporting the cost items. This will simplify the consolidation of the project cost and time tracking information, and the preparation of Earned Value Analysis reports, or other control and monitoring tools.

# Collecting information from the global team members

At project onset, the program or project manager must involve the project office team, and other team members that have knowledge in the different systems and tools, in order to agree on a common method for the duration of the project. This will be a challenge for projects involving people from different organisations, but can resolve many issues when addressed early.

# Collecting information from the global team members

The same considerations are required for other processes and tools used to collect performance information (for example, quality and customer satisfaction). The implementation of automated project management information systems may bring many benefits to global projects. During project execution, these systems can help the project manager, or project office members, to collect project information, by:

# Collecting information from the global team members



- providing a central place where project team members can store all project documentation;
- allowing the use of electronic forms, where the project team members will enter information on project milestones and deliverables in a structured and standardized format;

# Collecting information from the global team members

- providing databases that will store this information and will be available for queries by different stakeholders;
- integrating with other office software suites, and prompting team members to enter information on due actions, issues and risk items.

# Collecting information from the global team members

Online meetings are another important source of project information. The meeting moderator can use databases or spreadsheets and prompt team members for the status of their activities, issues and risks, updating the project schedule or other records during the meeting. This will increase the level of commitment from key project team members, by allowing them to:

# Collecting information from the global team members

- voice their concerns on specific actions or issues;
- participate in the risk assessment;
- identify the impact of change on all project elements;
- coordinate the activities of their local colleagues and represent them during meetings.

# Distributing information to the global stakeholders

Project managers or project office administrators can use software packages to structure and summarise the project performance data, in formats that include spreadsheets, graphics and colour-coded presentations. The information can be presented during project status meetings, but also be available on the project website.

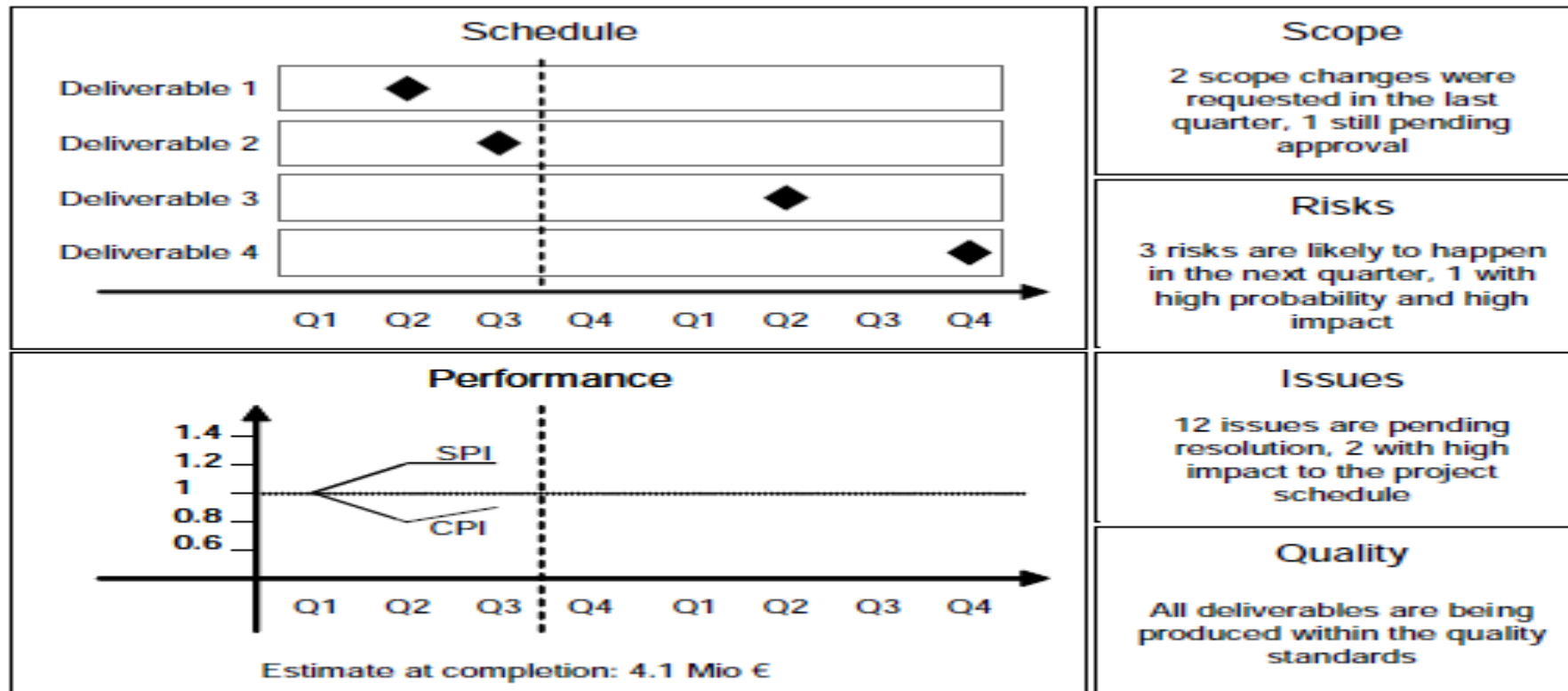
# Distributing information to the global stakeholders

The web format can provide the information to a larger audience, and use hyperlinks to structure the information according to the requirements of different stakeholders. One possible approach is the preparation of a project dashboard, published on the home page of the project virtual room, with the following structure:

# Distributing information to the global stakeholders

**Level 1 – overall status:** in one web page, present the actual status and the evolution of the main relevant project performance items over time. This will satisfy the requirements of stakeholders who need to have an understanding of the project progress, but who are not interested in detailed information. Figure below shows an example of a project dashboard that allows the interested parties to monitor project status by presenting a summary of the project schedule, performance of work (using Earned Value Analysis technique), scope, risks, issues and quality.

# Distributing information to the global stakeholders

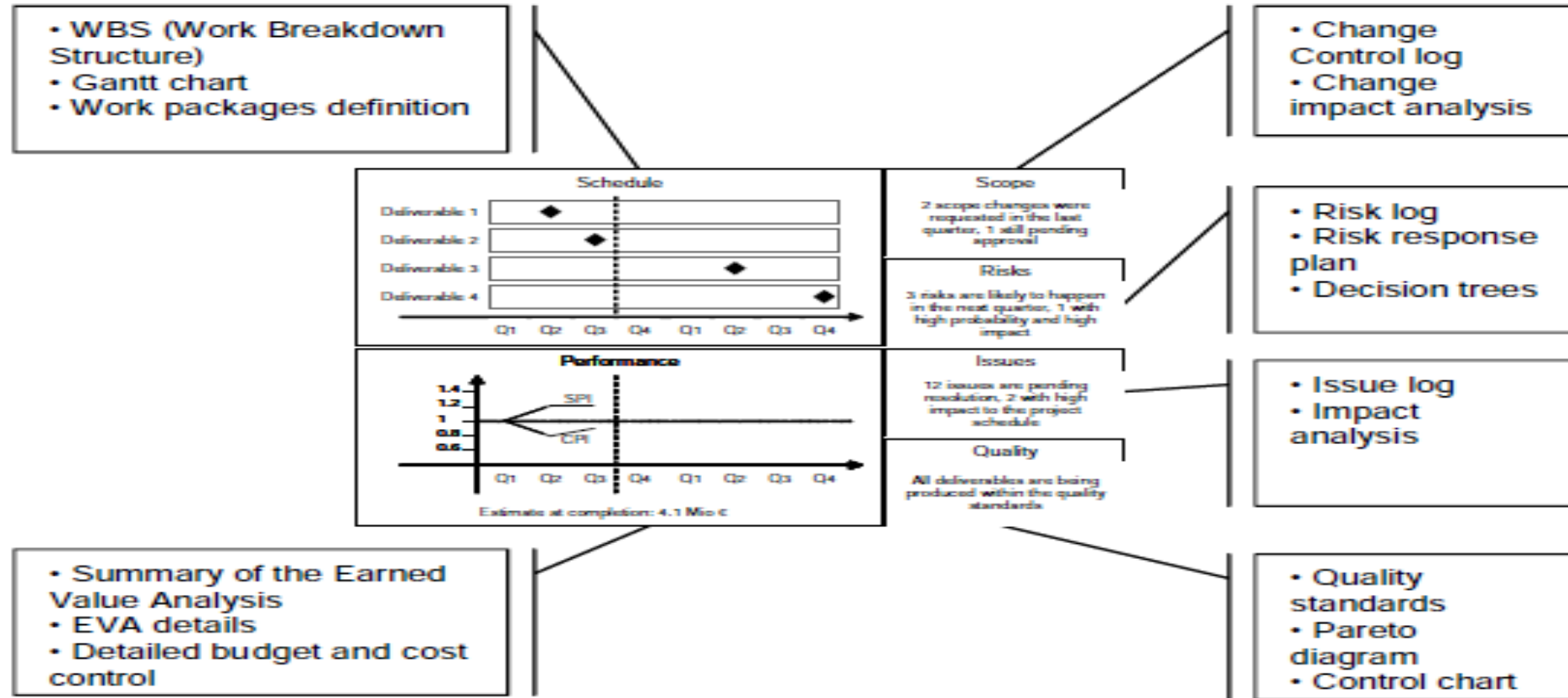


**Figure 9.1** Example of a project dashboard – main page

# Distributing information to the global stakeholders

**Level 2 – detailed analysis and list of additional references:** depending on the audience, more explanation will be required for a complete understanding of the charts and acronyms. As illustrated in Figure below, the main dashboard page can provide hyperlinksto a second level of information, containing a detailed analysis on the project knowledge, and providing a link to other documents that contain more details on specific items. As an example, this level can expand the Earned Value Analysis charts into indexes and forecasts, with enough explanations to make all stakeholders understand the project status.

# Distributing information to the global stakeholders



**Figure 9.2** Example of a project dashboard – second level pages

# Distributing information to the global stakeholders

**Level 3 – detailed information:** the last level of information will be the documents that were used as a basis when producing the summaries on the previous levels. As an example, auditors can access the project cost documentation, and the spreadsheets used to calculate the Earned Value Analysis indexes, to review the data, validate the formulas and understand the reasons for deviations.

# Exchanging project information

one project team member (usually the project office administrator) will own the project records, and have short status review meetings with individual coordinators or team members before the status review meetings.

# Exchanging project information

The project manager will need to monitor the effectiveness of the team meetings and adapt the project organisation and the meeting agendas to obtain the optimal ratio of meeting duration and number of items discussed. The agenda of the checkpoint meetings can include discussions on:

# Exchanging project information

**Stakeholders** – introduce new members to the project team, inform the team members of important changes on the stakeholder register and identify the impact of these changes on the activities from different project team members. Decide if these changes generate issues that affect the project and if separate meetings or task forces will be required to prepare a strategy for the corrective actions.

# Exchanging project information

In the same way, identify whether these changes add new risks to the project. Discuss the impact of these changes on the project organization chart and roles and responsibilities matrix.

# Exchanging project information

**Communication** – inform the team members of changes to the global communication matrix, and confirm if the project team members require inclusion in the distribution chain of new types of project information. Inform the team members of important changes to the structure of the project web site.

# Exchanging project information

**Assumptions** – detect if the assumptions made in early project phases were valid or incorrect. Discuss the impact of incorrect assumptions on the project schedule, costs and risks.

# Exchanging project information

**Project schedule** – review the progress of activities and the impacts of delays on the project schedule. Identify if important changes have occurred that require approval from other stakeholders. Decide if these changes generate issues or risks that must be evaluated in more detail. In this case, identify which project team members will be required for this evaluation, and who will own the corrective action.

# Exchanging project information

**Issues and corrective actions** – review the latest status of the main issues and their corrective actions, and discuss the impact of critical actions that are still open after the target resolution date. Decide on the best method to obtain the appropriate resolution: a change in the action ownership, escalation to line managers, assigning more resources for its resolution or making a change to the project schedule.

# Exchanging project information

**Risks and Opportunities** – review the status of the risks that have past or imminent trigger dates, reviewing the appropriateness of their response strategies and impacts on the project. Review major changes of the estimated levels of probability and impact.

# Exchanging project information

**Changes** – review the changes requested or approved since the last status meeting, and discuss their impact on scope, schedule or cost. Ask the team members whether they are aware of unofficial or imminent change requests that need to be formalized.

# Exchanging project information

**Quality** – review the overall results from control measurements, and discuss how the recommended corrective or preventive actions can be implemented, and if they generate a change to the project.

# Exchanging project information



**Procurement** – review changes on sellers, contracts and other procurement items that have an impact on the activities of various project team members.

# Exchanging project information

**Meeting log (meeting minutes)** – before closing the session, review the main decisions taken during the meeting, and other important points not captured in the previous items of the agenda.

# Exchanging project information

In large programs and projects, separate status review meetings are required to cover points owned by different groups, organisations or organizational units. As an example, a complex program might have one status meeting for each major project, and one consolidated status meeting with all project managers to cover the items that have an impact on the different projects or on the whole program.

# Exchanging project information

The items on the agenda refer to information in different sections of the global project binder (for example, the discussion on stakeholders may generate entries on the risk register or the issues register). Thus, the format of the Global Project Binder or project web site will need to provide a good level of flexibility, for the meeting moderator to switch from one section to another, while keeping the meeting momentum.

Resources:

Global Project Management

Communication, Collaboration and Management Across Borders

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