

## Project management chart

### Use

The project management chart is an important tool in the detailed planning phase and the implementation phase. It is useful for:

- defining the intermediate objectives of each 'milestone' and for the detailed planning of measures and interventions, target dates and responsibilities,
- assessing and documenting project progress ('milestone' reporting),
- planning the next project phase.

### Instructions for the detailed planning phase

#### I. Establish charts for detailed planning

Establish a separate and detailed planning chart for each project phase (see Figure 1) and number it (n) according to the general planning chart.

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Management chart – [Project X]								
Detailed planning of stage [n]								
No	Objectives (project/quality)	Measure	Date	Respons.	Intermediate objectives	A	EV	GA
1	[Category 1]							
1.1	[Objective 1.1]							
1.2								
2	[Category 2]							
2.1								

Figure 1: Project management table (detailed planning)

Copy the numbered project objectives from the general planning chart into the first two columns of the management chart. This will allow you to keep a sharp focus on your objectives throughout the project.

## II. Define intermediate objectives

Think about all the strategic steps needed in order to reach each project objective. Determine exactly where you need to be at the end of each phase in order to achieve your ultimate project objectives. Set your intermediate objectives now and formulate them in a goal-oriented and SMART way (see Figure 2).

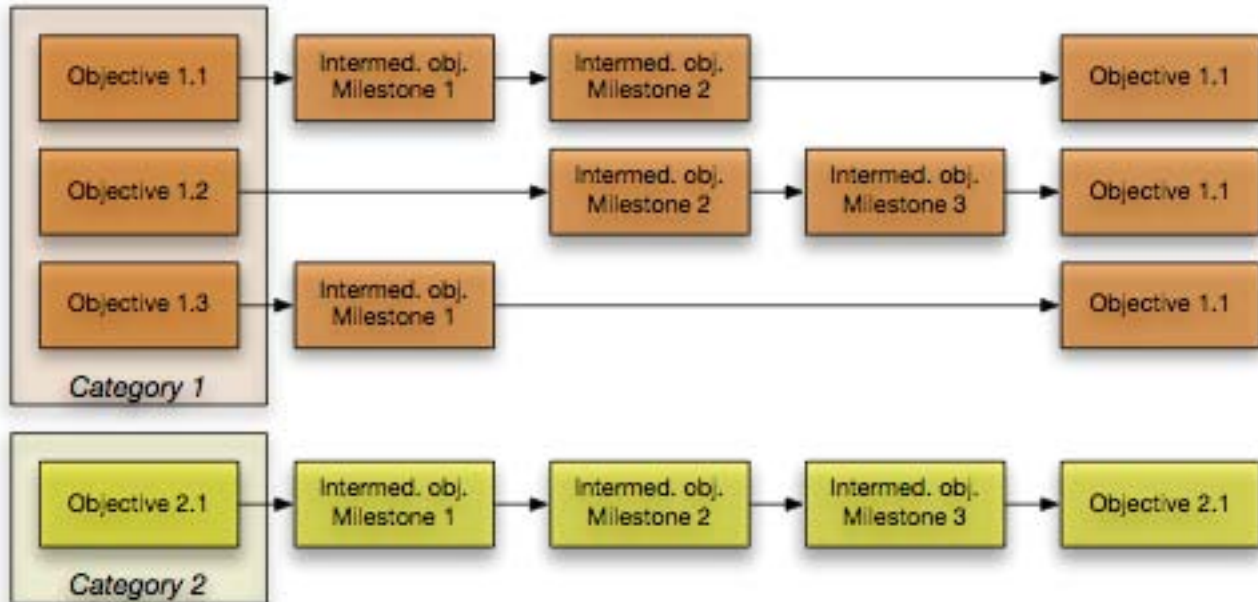


Figure 2: Intermediate objectives

Write the intermediate objective in the correct column and on the same line as its corresponding project objective.

Again, take care to formulate the objectives clearly and according to the following criteria:

- **Specific** (describe clearly what the envisaged change consists of and how this is to be achieved)
- **Measurable** (the achievement of an intermediate goal can be determined)
- **Achievable and challenging** (efforts are needed to achieve the objective)
- **Realistic** (the intermediate objective is achievable with the available resources and within the intended timeframe)
- **Time-limited** (it is clearly stated when the intermediate objective should be reached – usually at the next 'milestone')

The contract with your institution or with your client might stipulate agreed criteria for abandoning the project. Highlight the intermediate objectives that are crucial for the continuation of the project in column 'A'.

If the need for quality improvement arises, you can also set yourself quality objectives and enter them here. The "Checklist for quality criteria" can help you identify weak points of your project. Quality objectives should be formulated with the same criteria (SMART) as those mentioned for project objectives and intermediate objectives. Further explanations are in the topic "Definition of quality criteria".

## III. Determine measures, target dates and responsibilities

The actual planning of a project phase can start as soon as your intermediate objectives for that phase have been set. Determine which measures are needed to achieve each objective: What activities are

actually needed in this phase of the project in order to achieve what you set out to do? Identify the person responsible for each activity and fix a target date.

#### **IV. Determine evaluation needs**

In order to appreciate if you have reached your objectives, some of them will have to undergo an evaluation. Mark them in the column 'EV'. Later on, these objectives will be copied into the evaluation table.

### **Instructions for 'milestone' reporting (intermediate reports)**

Each stage of a project is concluded by a 'milestone'. Milestones are important project management tools. They provide an opportunity to reflect on successes and disappointments of the past stage; the detailed planning of the phase ahead will start here. More information is available under the topic "Conducting milestone meetings". The tool called "Milestone meetings" contains guidelines for planning and conducting such sessions.

#### **I. Prepare tables and list for the intermediate 'milestone' reports**

Copy the tables and lists for the milestone report (see example and figure 3) after each detailed planning table. Make sure you mention the date of each milestone.

#### **II. Check if your targets have been reached**

Your detailed planning table contains a column 'GA'. Here, you can enter (in %) the approximate attainment level of each intermediate target during a particular phase of your project.

The table 'Remarks regarding the achievement of intermediate objectives' provides an opportunity to document positive and negative experiences as well as difficulties and obstacles that you have encountered during the implementation of the previous phase.

These observations might lead you to draw certain conclusions (column 'Consequences'). The column 'C/A' gives you the possibility to distinguish between C = need for clarification and A = need for action.

### III. Unplanned activities

Many projects will generate unplanned activities. These can be documented (and action taken, if needed) in the second table 'Unplanned activities'.

#### Milestone report [mm.dd.yyyy]

##### Remarks regarding the achievement of intermediate objectives

No	Successes – failures (obstacles/difficulties)	C/A	Conclusions

##### Unplanned activities

No	Successes – failures (obstacles/difficulties)	C/A	Conclusions

##### Summary (conclusions)

- 

##### Prospect for the future (opportunities/threats)

- 

##### Remaining questions

- 

Figure 3: Project management chart (intermediate milestone report)

### IV. Final assessment

After these two tables, you will find three lists for concluding remarks. Try to draw up a comprehensive final report at the end of each phase and draw conclusions.

### V. Prospect for the future

When planning the continuation of the project, think about changes in the context or other developments that might advance the project (opportunities) or – on the other hand – impede it (threats). Mention any as yet unresolved questions that you cannot answer yet but which might become important later on in the project.

The retrospective look at the previous phase, the critical appraisal of its achievements and the prospective assessment of the project context will be the basis for the detailed planning (incl. adjustments and fine-tuning, if needed) of the next phase.

## Remarks

The project management chart is primarily a management tool for project leaders and will be used for team meetings and for sessions with the advisory group. It is not a document for your client. As a project leader you are only accountable for the achievement of the objectives and intermediate targets that are stated in the contract with your client.