



PRINCE2[®]

7th Edition

Masterclass

Handbook



Handbook 17

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Module 17

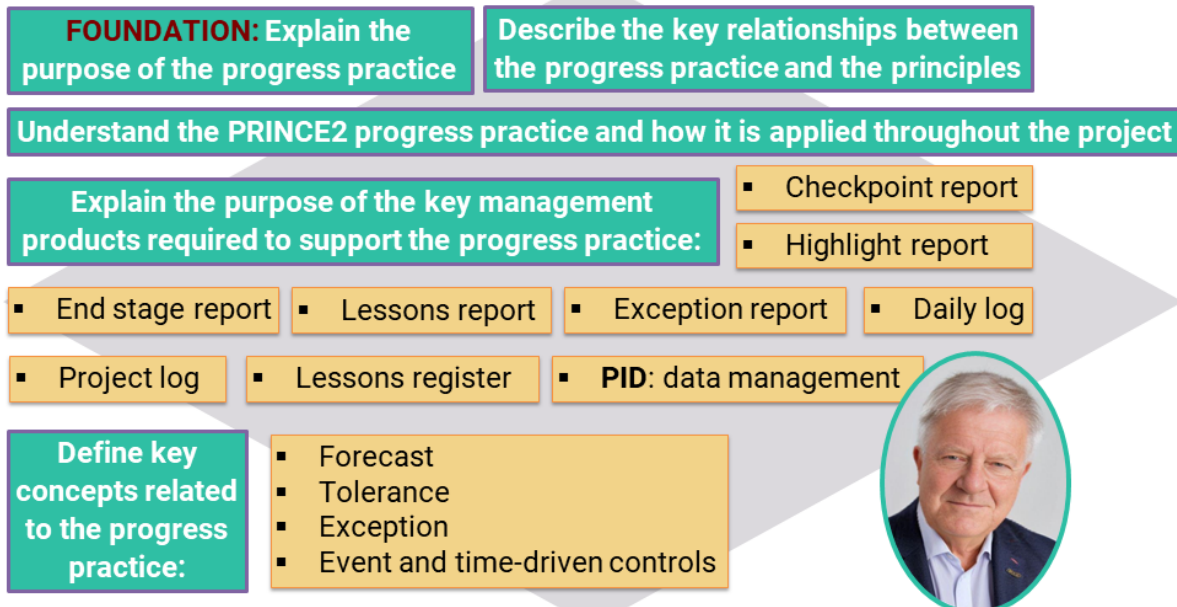
Lesson 1

The Progress Practice

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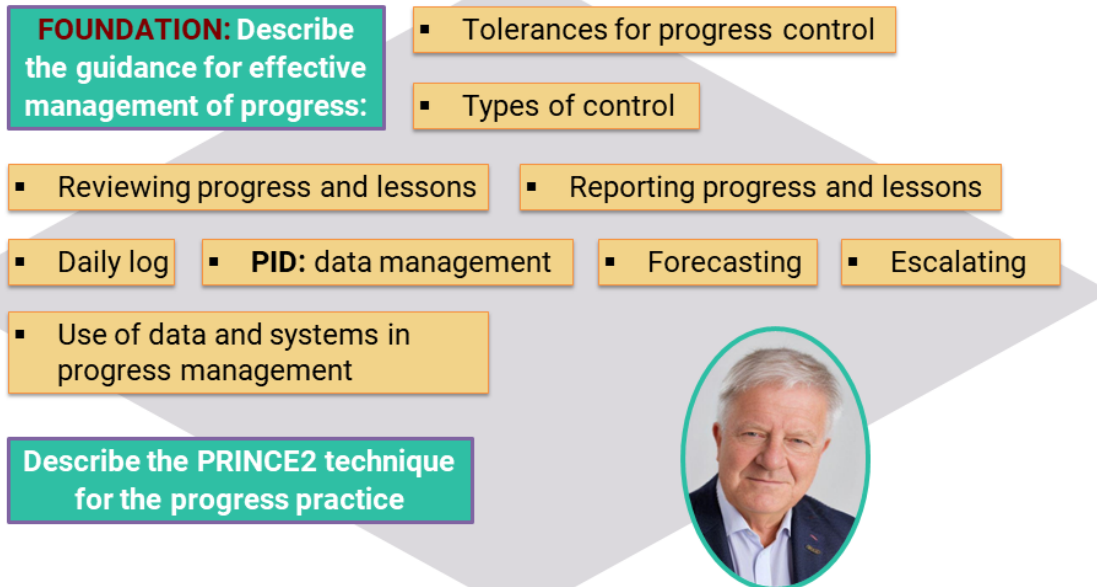
Progress Practice Learning Outcomes - 1



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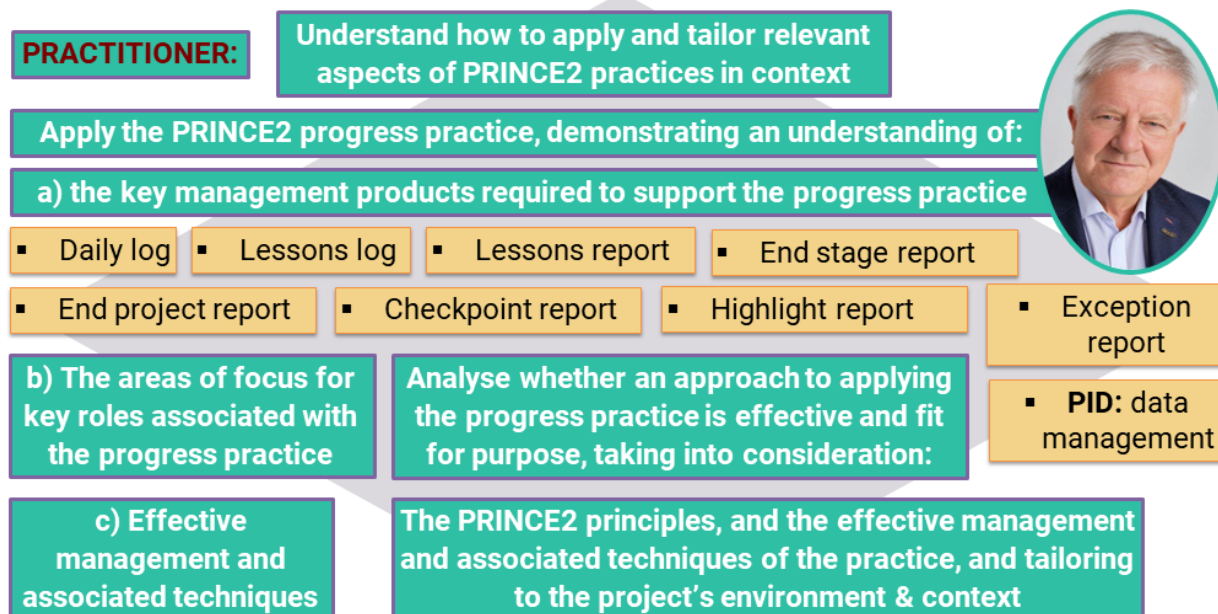
Progress Practice Learning Outcomes - 2



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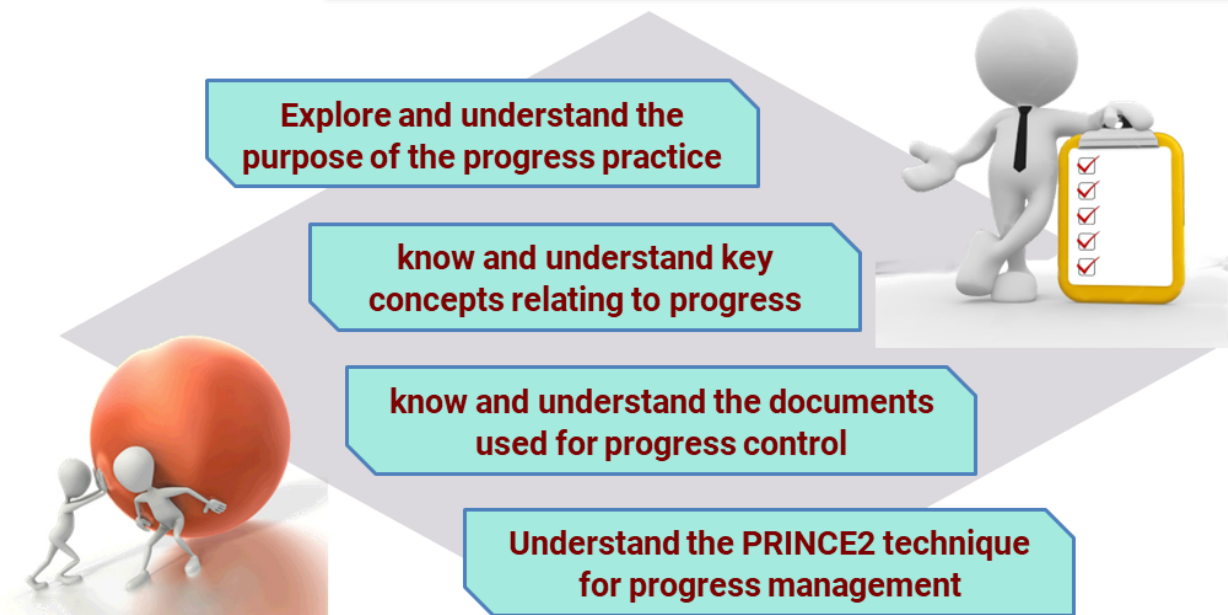
Progress Practice Learning Outcomes - 2



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What you will learn



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The progress practice – Module 17

By the end of Module 17, you will understand:

progress control and management
management levels and tolerances
tolerance layers
types of progress control
reviewing progress and lessons
reporting progress and lessons
capturing lessons and forecasting
forecasting progress and exceptions
exception levels
data and systems
dashboards and standups

earned value management
peer reviews
burn charts
retrospectives
kanban
applying progress practice
delivery methods
sustainability and scale
progress management products
progress key roles
progress practice principles



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The progress practice purpose

To monitor and compare actual achievements against those planned: establish **mechanisms** to monitor and compare actual **achievements** against those planned

To provide a **forecast** for the project's objectives and continued viability

To control unacceptable deviations: **Manage by exception: control** any **deviations** beyond agreed tolerances, causing an exception

A key component of **project management** is **controlling** the project's progress, which ensures that the project remains **viable** against its approved **business case**



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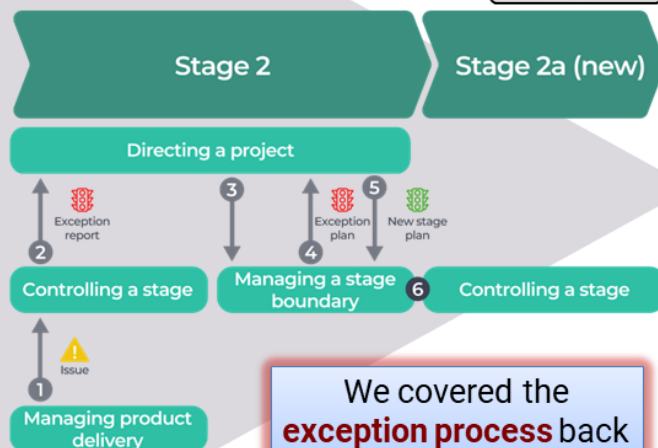
The exception process

If a stage or the project is forecast to deviate beyond its agreed **tolerances**, it no longer has the approval of the **project board**



Exception plans are requested by the **project board** in response to an **exception report**

Although an **exception plan** will be produced **prior** to the planned stage boundary, its **project board approval** marks a **stage boundary** for the revised stage



We covered the **exception process** back in Module 15, Lesson 4

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Lesson 2

Progress practice purpose, control and tolerances

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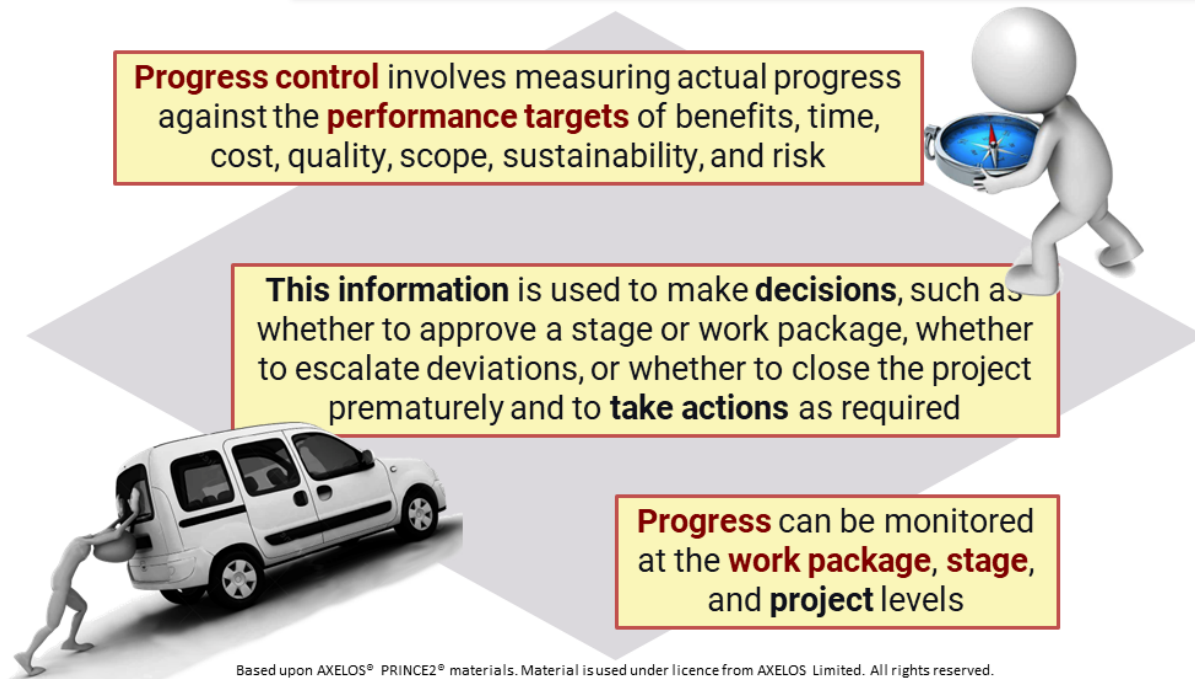
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Progress control

Progress control involves measuring actual progress against the **performance targets** of benefits, time, cost, quality, scope, sustainability, and risk

This information is used to make **decisions**, such as whether to approve a stage or work package, whether to escalate deviations, or whether to close the project prematurely and to **take actions** as required

Progress can be monitored at the **work package, stage,** and **project** levels



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Progress definitions and guidance

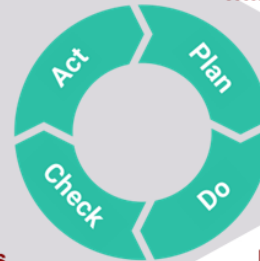
Progress: the achievement measure of plan objectives

Forecast: a prediction made by studying historical data and past patterns

Exception: a situation where it can be forecast there will be a deviation beyond agreed **tolerance levels** by the project manager and the project board (or between the project board and business layer)

Apply further actions
Continual improvement

Understand situation
What/how to respond



Validate results
Identify further actions

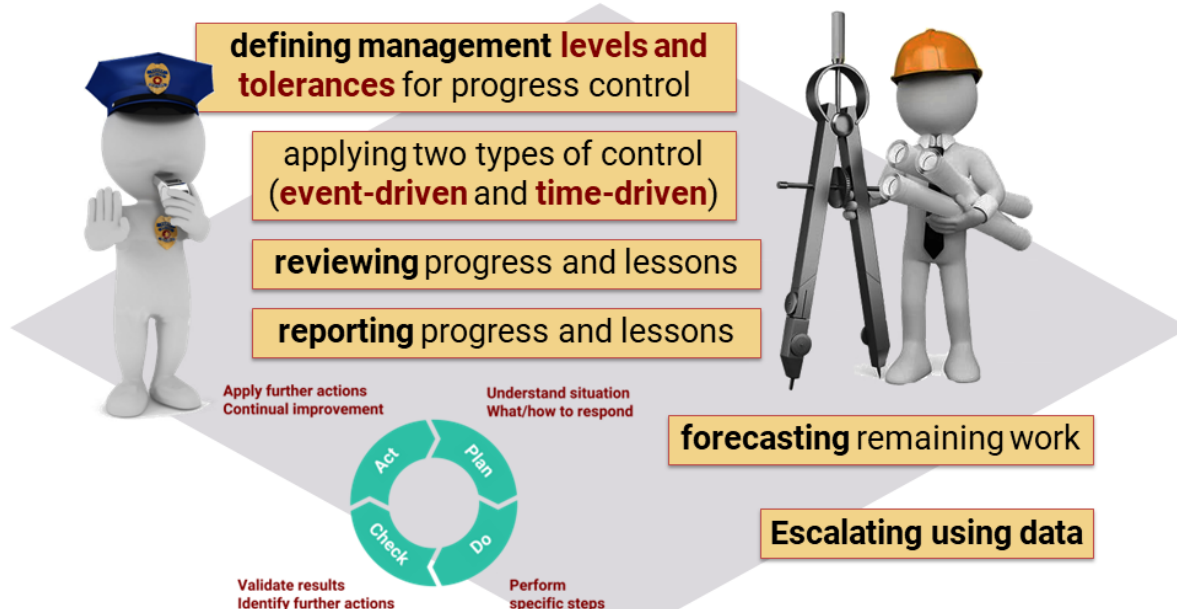
Perform specific steps

The progress practice is based on the Deming cycle or Shewhart cycle, also including other **PRINCE2 practices** such as risk management

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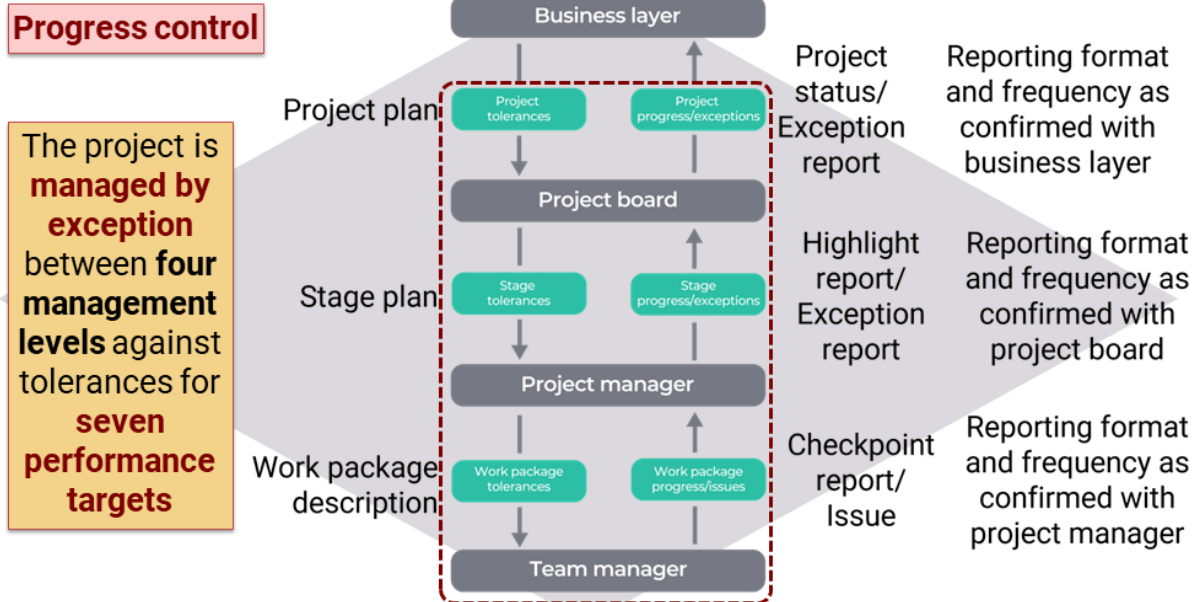
Effective progress management elements



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Management levels and tolerances - 1



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Management levels and tolerances - 2

Delegating tolerances involves putting an **assurance mechanism** in place so that each management level can be confident that such controls are effective

The business layer, outside the project team, sets the overall requirements and project-level tolerances

The three management levels within the project (directing, managing, and delivering) will manage and implement within these tolerances and escalate any project tolerance forecast breaches

The project board has overall control at a project level if forecasts remain within project tolerance and will allocate tolerances for each stage to the **project manager**

The project board can review progress and decide whether to continue, change, or stop the project



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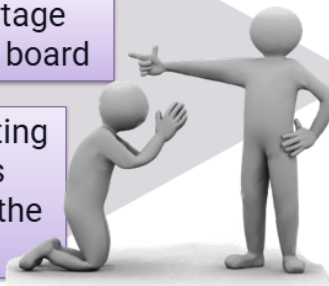
Management levels and tolerances - 3

When executing the **project plan**, if any **forecasts** indicate that the project is likely to **exceed** the agreed **project tolerances**, then the **deviation** should be referred **by** the **project board** to the **business layer** to decide the corrective action

The project manager has **day-to-day control** of a stage within the tolerance limits established by the project board

When executing a **stage plan**, if any forecasts indicating the agreed **stage tolerances** will be exceeded, this deviation should be referred to the **project board** by the **project manager** to decide the corrective action

This would be done by raising an issue and an **exception report**



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Management levels and tolerances - 4

The team manager has control over a work package, but only within the **work package tolerances** agreed with the **project manager**

When executing a **work package**, if any **forecasts** indicating the agreed tolerances will be exceeded, this deviation should be referred to the **project manager** by the **team manager** to decide the **corrective action**

This would be done by raising an **issue**



Project log

- Issue register
- Risk register
- Lessons log
- Product register
- Quality register
- Daily log



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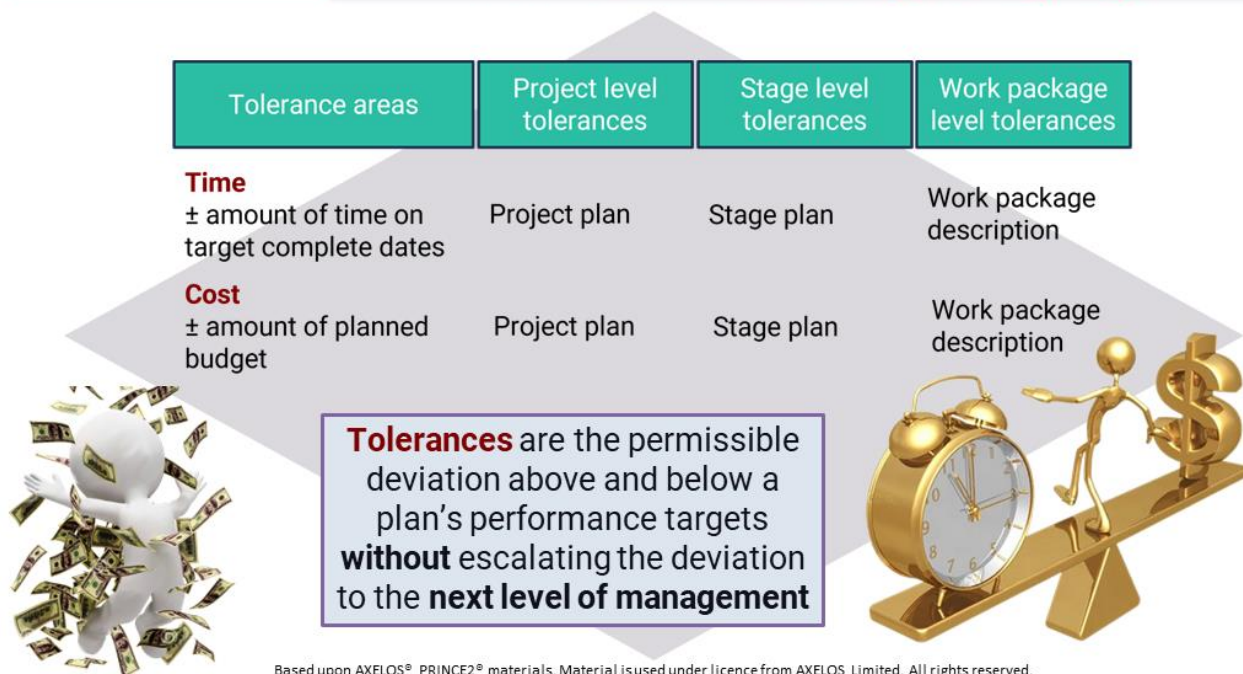
Lesson 3

Progress practice tolerances by layer

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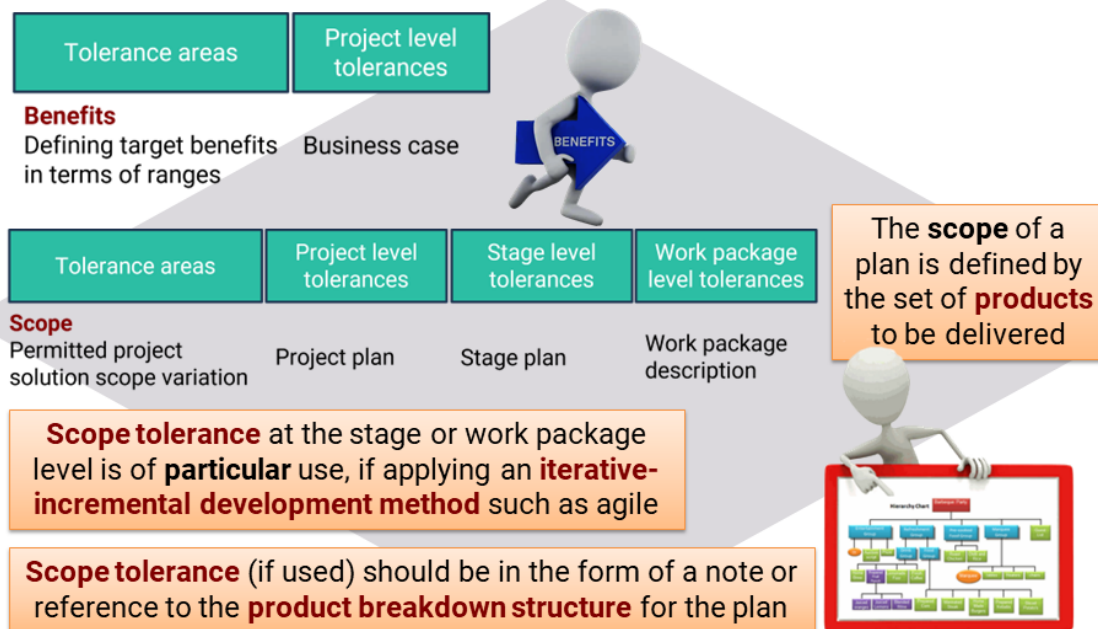
The seven tolerance types by layer - 1



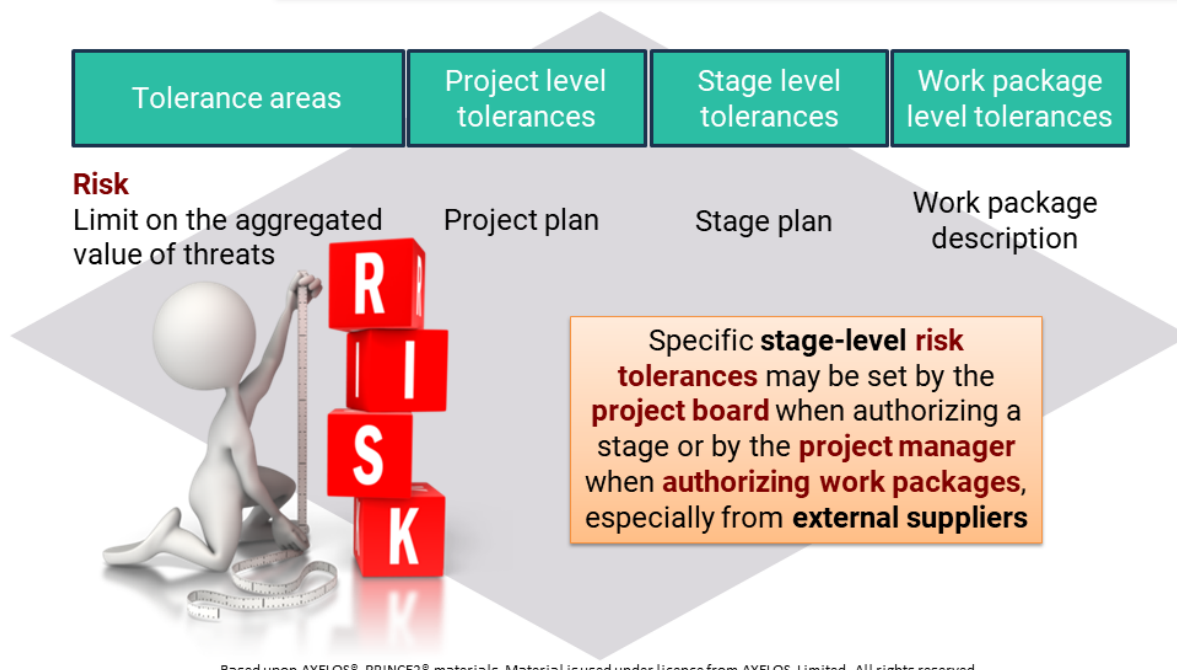
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The seven tolerance types by layer - 2

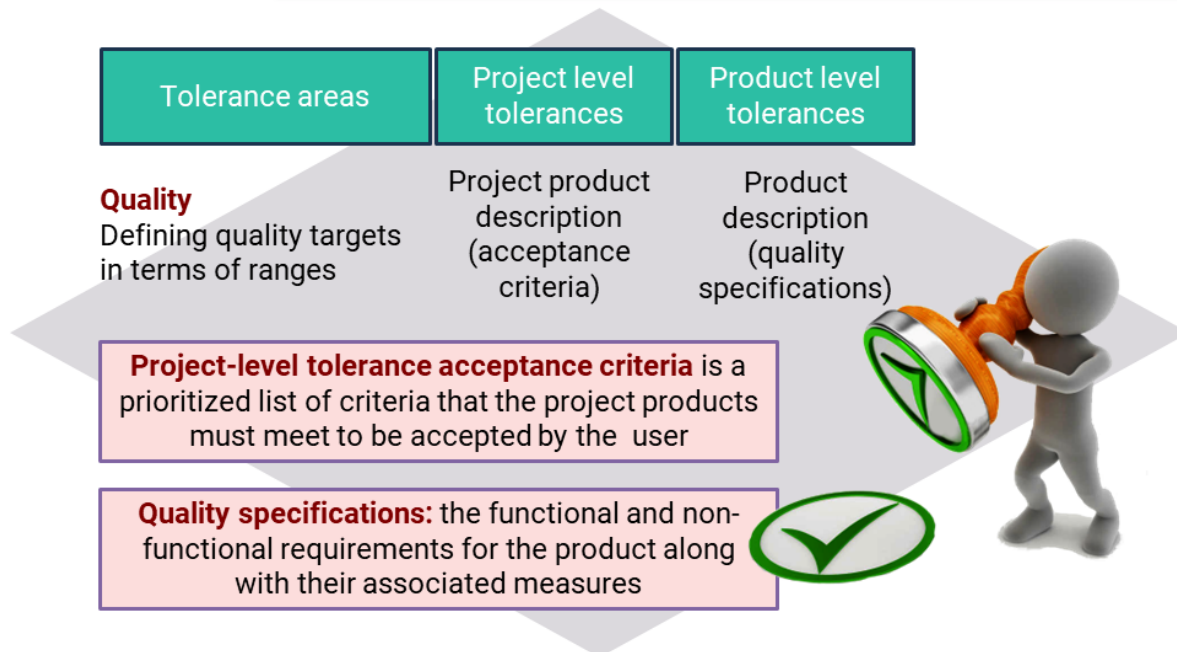
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The seven tolerance types by layer - 3



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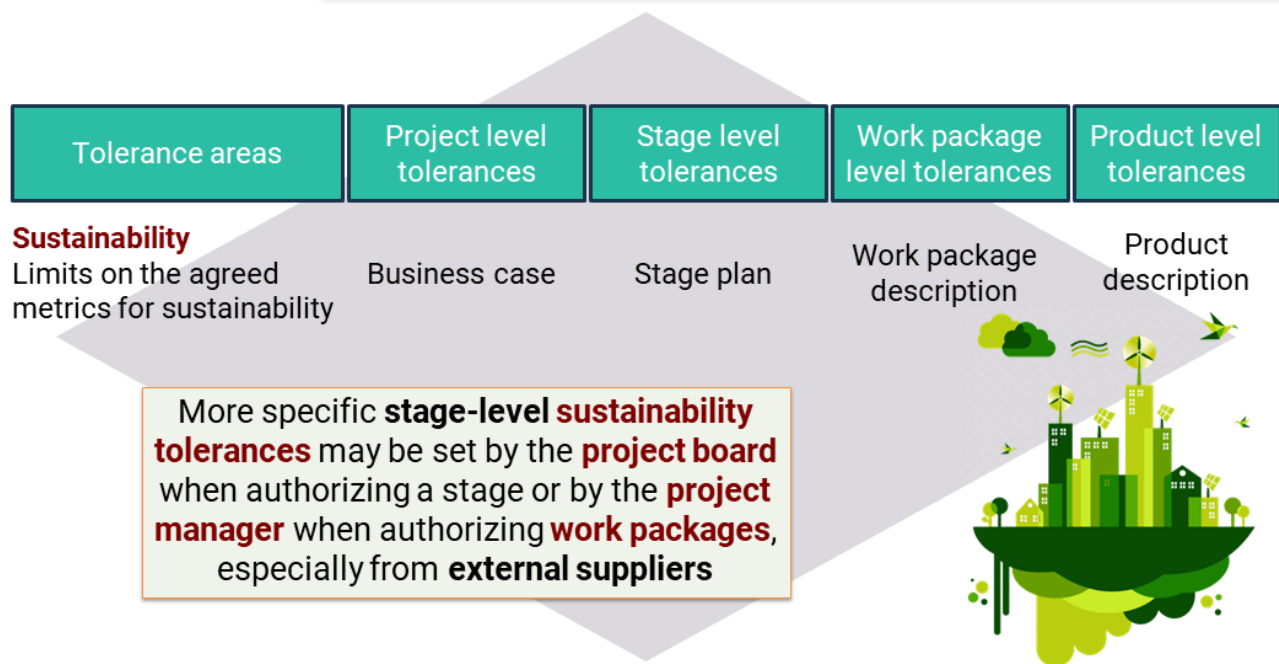
The seven tolerance types by layer - 4



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The seven tolerance types by layer - 5



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Types of progress control - 1

Effective project control is delivered through the accurate, timely, and regular measurement of **actual progress** and comparing it with the **planned progress** at that stated point in the **project or stage** and taking any necessary **corrective action**

Event-driven control:

a control that occurs when a **specific event** occurs, i.e. end of a stage, the completion of the **PID**, or the creation of an **exception report**

It could also include **organizational events** that may affect the project, such as the end of the financial year

Monitoring is a time-based activity, control (**decision-making**) and an event-based activity

Event-driven controls **drive efficiency** since the **project management team** do not meet unnecessarily or too frequently, but when most needed

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Types of progress control - 2

Time-driven control:

a management control that occurs at **predefined periodic intervals**

For example, this could be producing **highlight reports** for the project board or **checkpoint reports** showing the progress of a work package



Reporting is both **time-based** and **event-based**

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Lesson 4

Reviewing progress and lessons

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Reviewing progress and lessons - 1

As part of the **controlling a stage** process, the **project manager** will regularly review progress through **checkpoint reports** and will maintain the **project log**

The **project manager** will use this information to **update** the **stage plan** with the **actual progress** achieved

The format and frequency of **checkpoint reporting** will depend on the needs of individual **work packages**, as it is only possible to control progress at the level of detail in the plans

For example, if **weekly checkpoint reports** are required, the stage plan will have to include what needs to be achieved week by week



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Reviewing progress and lessons - 2

It is also necessary to analyse the **project data for trends** to get a view of the overall health of the stage

For example, the stage may seem to be progressing well in terms of the **products** being completed against the schedule ...

... however, the issue register may reveal an increasing number of issues that are not being resolved and **may** be a cause for concern

Similarly, the **quality register** may reveal several products have failed a test and have not yet been recorded as having been **re-tested** in the quality register



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Reviewing progress and lessons - 3

Actions may arise from **many sources** and **small actions** may simply be recorded on the **daily log** and marked when completed

The daily log can also be used to record informal issues and any other notes or observations that are not captured by any other management product

A formal issue will be captured in the issue register as an open forum and be monitored and reviewed due to its material impact on the project or stage

An informal issue is one that either does not have a material impact or requires handling in a suitable manner where open access would be inappropriate



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Reviewing progress and lessons - 4

The daily log is a useful way of recording individual observations that on their own may seem insignificant but when collated may alert the project manager to a new issue or risk

The product register also provides data on the status of the products that are complete, currently in progress, and awaiting development

The data from this register may be compared with the physical status of the products to provide **assurance** of the **project's progress**



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Reviewing progress and lessons - 5

A principle of a **PRINCE2 project** is that the project management team **learns from experience**...

... therefore, the project team actively seeks, records, and incorporates **relevant lessons** throughout the life of the project, applies them to the remaining work and shares them for future projects

The project level of control and frequency of reporting may vary, and be influenced by the **experience and capability of the project team**

It is often in the **reviewing of progress** that **lessons** are identified

The project log includes a **lessons log**, which is used for capturing lessons and is accessed when reviewing progress

**Project log**

- Issue register
- Risk register
- Lessons log
- Product register
- Quality register
- Daily log

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Lesson 5

Reporting progress and lessons

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Reporting progress and lessons - 1

The frequency of reporting should reflect the **level of control** required, and this is likely to vary during the project ...

... for example, if the team is **highly experienced**, then **less frequent** reporting may be appropriate

Whereas, for an **inexperienced team**, the project manager or project board may wish to increase the frequency of reporting until sufficient confidence has been gained in the capability of the team



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Reporting progress and lessons - 2

Report	From/to	Type	Use
Checkpoint report	From a team manager to the project manager	Time-driven	To provide a progress and status update of their team plan
Highlight report	From a project manager to the project board	Time-driven	To provide a progress and status update of the project and stage
Lesson report	Depends on the context	Event-driven or time-driven	To provide a detailed lessons review of a specific lesson or a stage or the project

PRINCE2 does not define the composition, format, or presentation for reports, which should consider the quality management, risk management, and issue management approaches

If part of a **programme**, the information should also consider the programme's monitoring and control requirements



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Reporting progress and lessons - 3

Report	From/to	Type	Use
Issue report	Depends on the context	Event-driven	To enable a request for change, off-specification, business opportunity, or a problem or concern to be formally reviewed and responded to
Exception report	From the project manager to the project board	Event-driven	To report where tolerances have or are forecast to be breached for the stage or project and seek direction from the project board



Reports may take the form of an **electronic dashboard**, which has aggregated and summarized data from an integrated system

These dashboards may be available to the respective stakeholder audience, such as for the directing, managing, or delivering levels of the project

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Reporting progress and lessons - 4

Report	From/to	Type	Use
End stage report	From the project manager to the project board	Event-driven	To report the performance of the stage and request approval to proceed to the next stage
End project report	From the project manager to the project board	Event-driven	To report the performance of the project and subsequent recommendations and request approval to close the project

For access and availability refer to the **digital and data management approach**

The status of **products** within the project, stage, or supporting a progress review are held in the **product register** on a self-service basis

This snapshot data may be held within a **system** rather than a document or spreadsheet



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Lesson definition

A lesson is information to facilitate the future of the project or other projects and actively **promote learning from experience**

The experience may be **positive**, as in a successful test or outcome, or **negative**, as in a mishap or failure

Recording lessons during a project is good for the organization, project team, and other existing and future projects

Lessons are **documented information** that reflects both the **positive and negative** experiences of a project



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Lesson 6

Capturing lessons and forecasting

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Capturing lessons

Lessons can be captured:

during a **post-project review**

during any **meetings** throughout the project (you do not have to wait until a post-project review to share lessons)

via **PRINCE2 management products** like **checkpoint reports** or **highlight reports**

by performing **retrospectives**

when **issues** occur during stakeholder one-to-one meetings

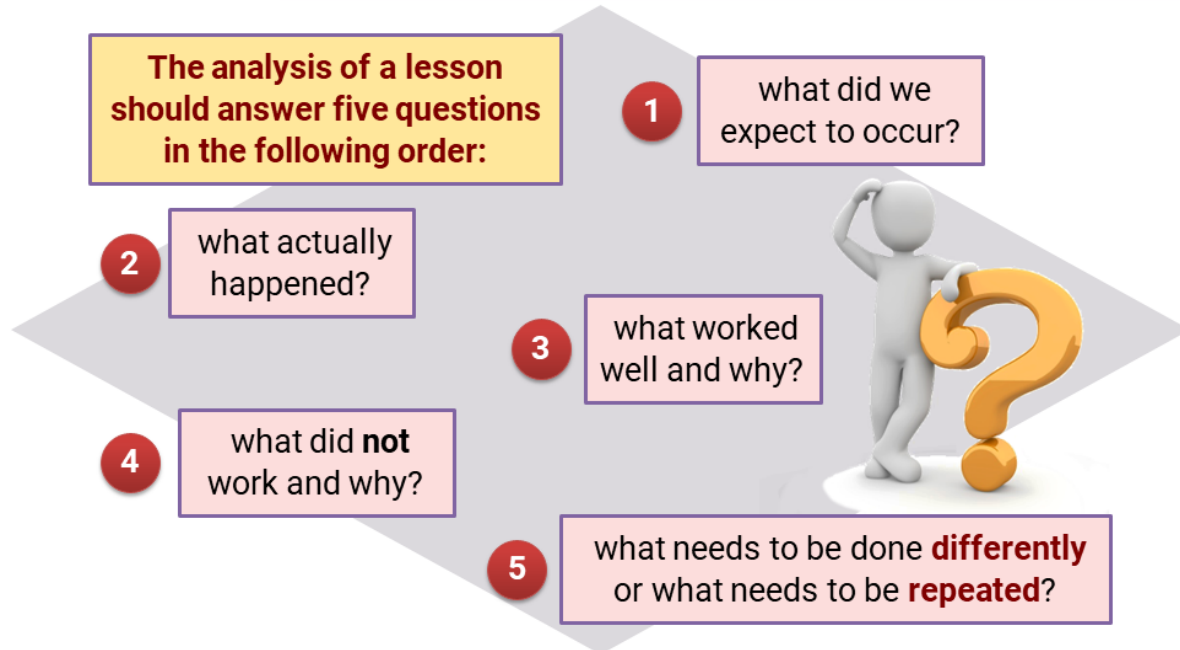
using **electronic workspaces** where data and information are shared



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Lesson analysis



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Management and collaboration systems

Document management systems or **team collaboration systems** are useful tools for sharing and **reporting knowledge from lessons**

It should be noted that **systems and data** play a major part in **reviewing progress**

Any reports, registers, or logs may originate from a system where the **data** is **integrated and accessible**

This would be by the **digital and data management approach** and presented electronically with drill-down capabilities to access more detail



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Lessons information

The reporting of lessons could include information about the development of a **product**, or the project management practices, processes, procedures, techniques, or tools used that either contributed to the project's achievements or caused a problem

Examples might include the performance of the **project management team**, the **methods** used, or the analysis of quality **data and measurements**

Larger projects are more likely to utilize a lessons report as part of this procedure, where more detail would be helpful



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Forecasting progress and exceptions - 1

A fundamental component of the **manage by exception** principle is **forecasting**

An exception is defined as a situation where it can be forecasted that a deviation beyond the agreed **tolerance levels** will occur

It is not necessary, nor helpful, to wait **until** that deviation has occurred ...

... therefore, **forecasting within projects** is essential because it helps to **identify responses** to project risks, predict project outcomes, and help ensure **overall project success**



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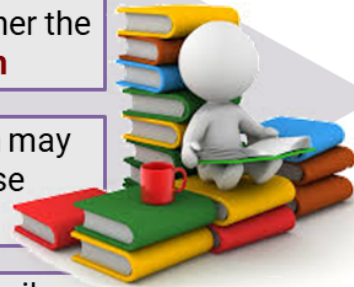
Forecasting progress and exceptions - 2

It is important to consider the performance of the project so far and all seven **PRINCE2 performance targets** should be considered

The collected data provides the **project manager** with sufficient information on the past performance to **predict the future risks and outcomes**, as well as determine whether the project retains a **continued business justification**

The data may be held in an **integrated system**, which may also allow for 'what if' scenario forecasting, to ease the **forecasting workload for project managers**

The digital and data management approach will describe what systems and data will assist with forecasting. This may involve using data from outside the project or the business



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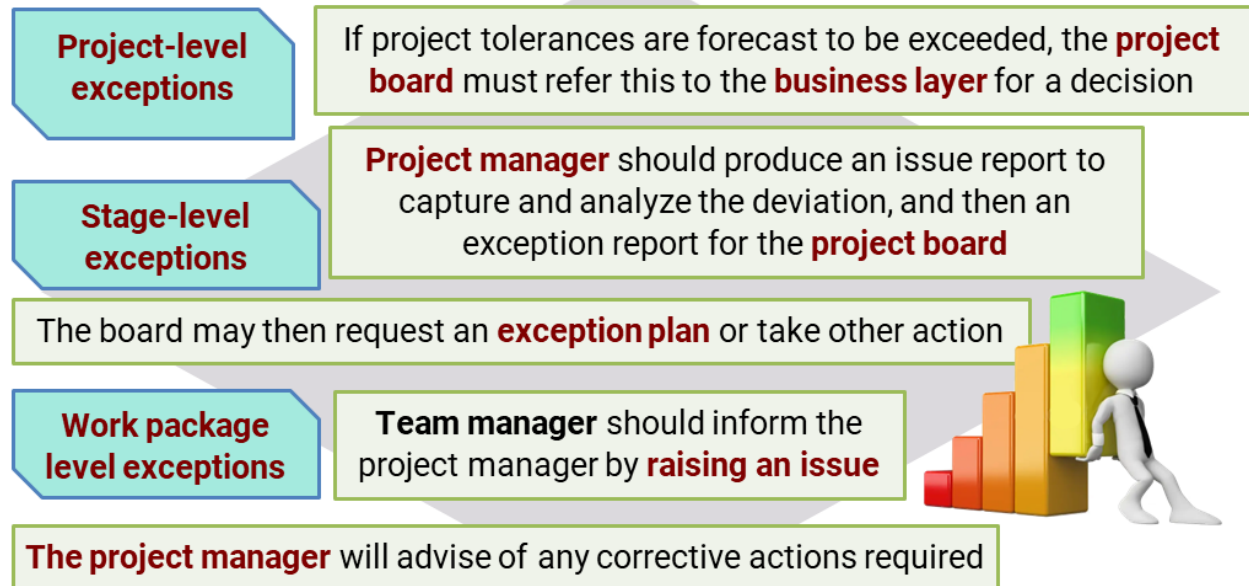
Lesson 7

Management by exception

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Exception escalation - 1



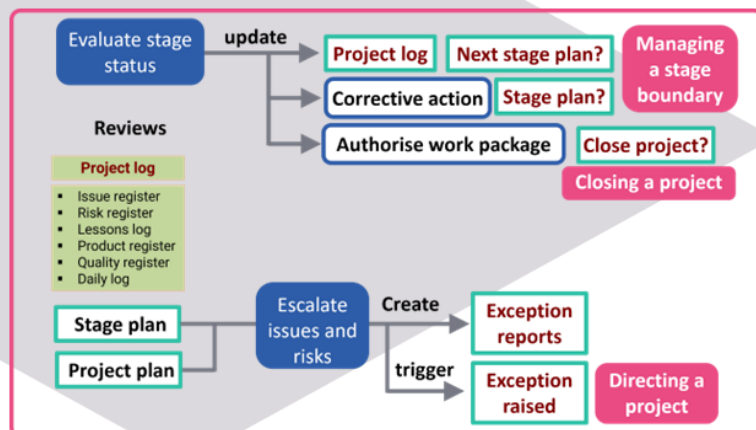
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Exception escalation - 2

Having **reviewed stage progress** a decision is made as to whether the work package, stage plan, or project plan will remain within or exceed the **agreed tolerances**

If they **exceed** or are **forecast** to exceed the agreed **tolerances**, then they are an **exception**



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Exceptions levels - 1

Work
package
exceptions

After agreeing on the **work package tolerances** with the **team manager**, the **project manager** should be kept informed of progress with regular **checkpoint reports**

If a **work package** is forecast to **exceed its tolerances**, the **team manager** should **raise an issue** for the **project manager** who will advise of any required corrective actions

Stage
level
exceptions

The **project manager** should produce an **issue report** to capture and analyse the data behind the deviation and then provide an **exception report** for the project board

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Exceptions levels - 2

Stage
level
exceptions

Based on the information in the **issue report**, the **project board** may request that the **project manager** produce an **exception plan** to **replace** the plan that was forecast to exceed **tolerance**

The **project board** may also remove the **cause**, accept or adjust the **tolerance**, or request **more time** to consider the recommendations

If an **exception plan** is requested, the **project board** will review and either **approve or reject the exception plan**



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Exceptions levels - 3

Project level exceptions

Be clear, the project board will pass the project-level **exception report** to the business level, and **ONLY** if they **request** an **exception plan**, will this option occur

If the forecast is for **project tolerances** to be exceeded, the **project board no longer** has the authority to direct the project and **must refer** the matter to the **business layer** for a decision

The project board may request the **project manager** to produce an **exception plan** for the project



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Lesson 8

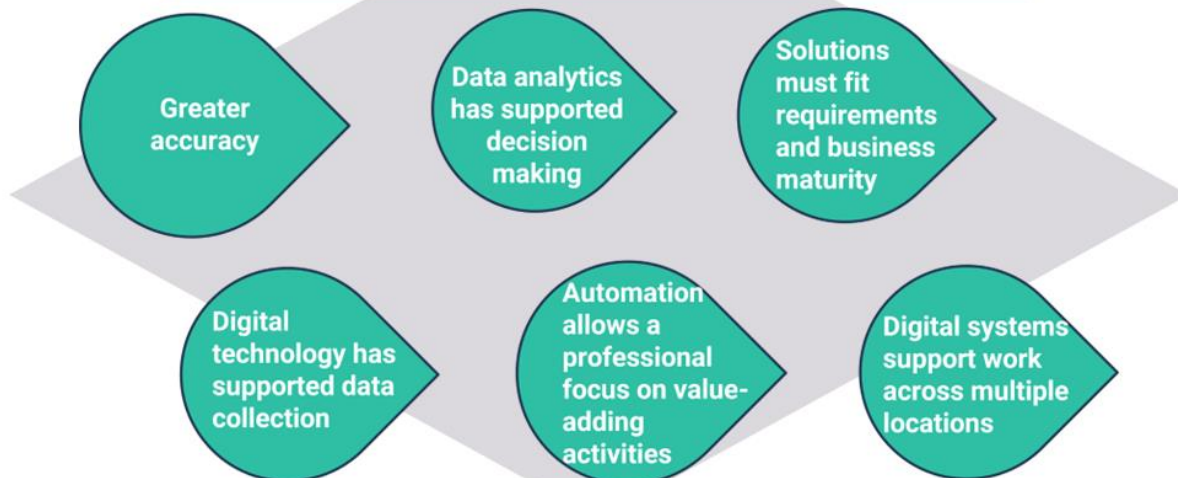
Progress data and systems

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Data and systems summary

How do data and systems support progress management and what factors need to be considered?



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Data and systems in progress Mgt - 1

Data and technology help manage projects **more accurately** by supporting **progress tracking and decision-making**

Data analytics is the means of using and analysing data to support effective **decision-making** or to efficiently automate tasks

Project data may be in the form of project documentation, correspondence, project log, and records, and includes internal and external data, as well as digital and non-digital formats

Project data collection has evolved dramatically using **digital technology** to plan and schedule projects, with **systems** to capture, validate, and present data against the plans and milestones to easily **understand progress**



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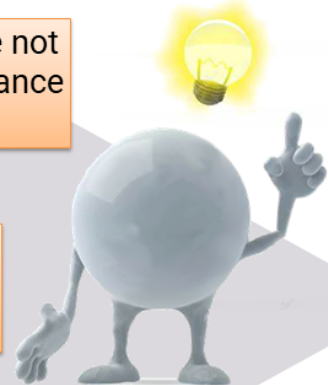
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Data and systems in progress Mgt - 2

Progress reviews with secured and stored data are not confined to looking backwards, since past performance can be used to **predict future performance**

To ensure clarity, this information can then be presented in the stakeholders' preferred **format and style**

The **project management team** must decide what they require from the **reporting and forecasting** procedures, and select a solution to fit the requirements and the **business maturity level** and the involved project organizations



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Data and systems in progress Mgt - 3

The project's **digital and data management approach** will explain:

how **digital technology** will support **project management** (e.g. project controls)

project work (e.g. the use of digital twins and building information modelling (**BIM**) in construction projects)

how the **data** will be used, and which **systems** will be used for **data analytics** across the project ecosystem and through the project lifecycle and afterwards



The business may already have **established systems** through a **centralized programme or project office**, or the nature of the project **may require new systems** to be designed, (possibly) procured, and established



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Data and systems in progress Mgt - 4

Such **digital technology** as the use of **sentiment analysis** to understand team performance or stakeholder engagement

Sentiment analysis (opinion mining), is a natural language processing technique which determines whether data is positive, negative or neutral

The management products used for checking the baselines, reviewing progress, capturing, and reporting lessons, reporting progress, or forecasting are often **different types or formats of data** residing in separate systems, databases, or file formats

Automation, for example, the use of **AI** is removing the need for a manual approach, enabling project professionals to focus on more value-added tasks rather than administration



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Data and systems in progress Mgt - 5

Due to home **working and globalization**, project teams are more likely to be distributed across multiple locations rather than **co-located**

Therefore, the use of **digital systems** can help to communicate and transfer data or information

If the team and the data are up-to-date, **information management** is more reliable and easier to administer in an **automated system**



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Lesson 9

Supporting techniques – Part ONE

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Supporting techniques

Measuring stage progress involves looking **backwards** at the progress made against plans and **forward** at what still needs to be completed with available time and resources

However, effective **progress management** requires an open and transparent culture with a **no-blame attitude** to progress reporting

There are many **supporting techniques**, and the solution developers may use **Kanban** as a team board to demonstrate progress and hold **daily stand-ups** for reporting purposes



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Dashboards

A **dashboard** is a technique to represent vast amounts of **decision-supporting information** at an amalgamated level using **tabular** and **graphic** representation, such as graphs and traffic lights



Highlight Report

RAG Status	Overall	Benefits	Cost	Time	Quality	Scope	Carbon	Risk
This period	G	G	G	A	G	A	G	A
Last period	G	G	A	G	G	R	G	A

Project	NowBYou Campaign
Project Sponsor	Mary L
Project Manager	Tommy S
Reporting Period	February

1. Achieved this period? • Completed requirements gathering for new campaign	2. Expected achievements next period? • Complete options analysis for stage 3 • Establish coaching routine for Director of Campaigns
3. Pending Decisions and Changes • Waiting on Director of Campaigns to reduce the long list of options to be analysed	4. Critical Issues and Risks • Issue: Coaching sessions for Director of Campaigns not started • Risk: there may be insufficient funding depending on selected option • Risk: stage 2 completion could be delayed if long list of options are not reduced soon

Project Manager's Commentary

All identified stakeholders have been consulted and their needs captured in the requirements document. The sponsor will present the project at the next donors forum to gain (financial) support to enable the campaign to deliver to objectives.

Project Budget	Actual Cost	Forecast Cost	Cost Variance	Variance Commentary
£ 45,000	£ 4,000	£ 55,000	+£10,000	Based on initial estimates on the Business Case, additional 10K may need to be secured via donations

No.	Project Milestone	Baseline Date	Current Date	Variance Commentary
1	High-Level Requirements Gathering Complete	10-February	10-February	Completed
2	Financial support secured	05-March	05-March	-
3	Options selected	24-March	31-March	Too many options to analyse
4	Campaign Launch	10-July	10-July	-

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Daily standups - 1

These are **daily meetings** that are conducted quickly, and all team members attend

Originally called a **daily standup** (for a brisk, focused meeting), this is now rarely the case, with **virtual meetings** becoming more common in today's environment

Progress is reviewed, and every team member declares their next steps, using the **three guiding questions** which are:

what are you planning to do today?

what have you done since yesterday?

have you encountered any problems or issues?



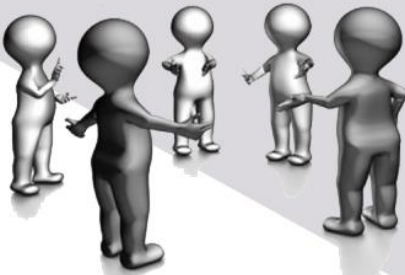
Feature A	5
Feature B	3
Feature C	2
Feature D	8
Feature E	2
Feature F	5
Feature G	3
Feature ...	...
Feature ZX	5
Feature ZY	2
Feature ZZ	1
Feature ...	...

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Daily standups - 2

Part of the **value** of the **daily stand-up** is that everyone in the team maintains **awareness** of what everyone else is doing



This creates an opportunity within an **organized, empowered team** for one team member to offer timely help or suggestions to another team member

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Peer review

A **peer review** is where people experienced in **project management** but outside the **project management team** are asked to **evaluate the project**



Peer reviews may also be held between **subject matter experts** about a particular **product**



There are many **peer review techniques**, and the **quality management approach** should identify the techniques appropriate to the project

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Supporting techniques Part TWO

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Earned value management - 1

EV creates an integrated project baseline combining **scope, schedule,** and **cost** performance by comparing the completed products and the actual cost and time taken against their schedule and cost estimates

Besides providing an objective assessment of **past performance**, it can be used to forecast total project cost and duration based on **historical performance**

PRINCE2's approach to **product-based planning** provides information to support **earned value management**

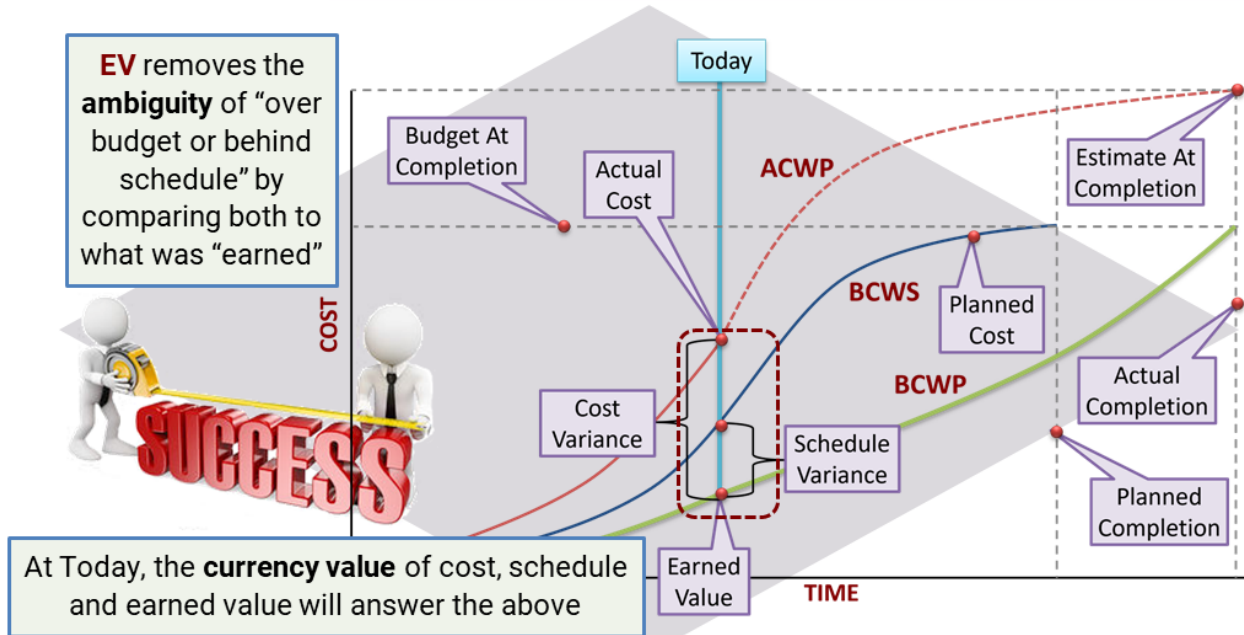
A **completed PRINCE2 product** can be compared to cost and schedule



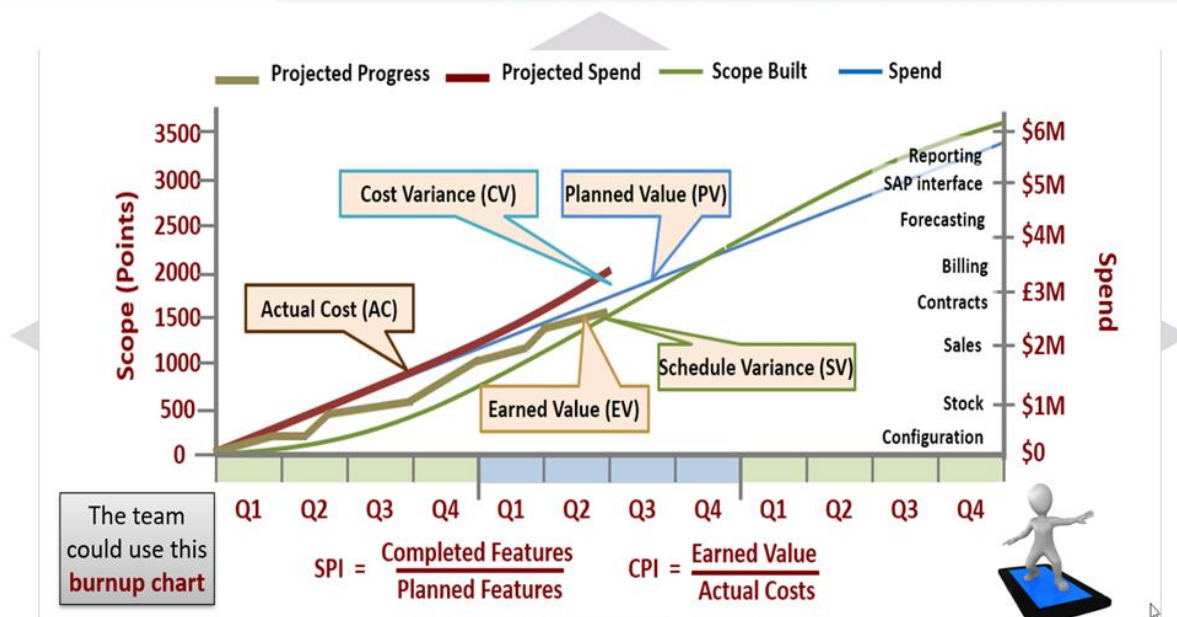
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Earned value management - 2

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Agile earned value metrics



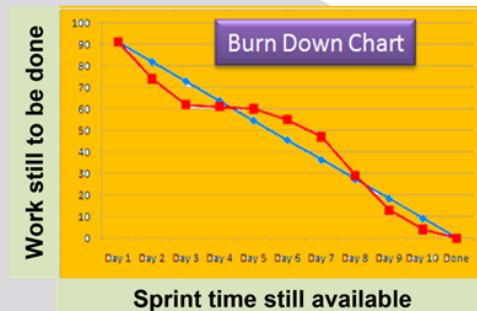
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Burn charts - 1

This is a technique for showing **progress** (for example, during a timebox), where work that is completed and work still to be done is shown with one or more lines

The chart is updated regularly (perhaps daily)

Burn charts help motivate teams by showing **progress** toward the **project's outcome**



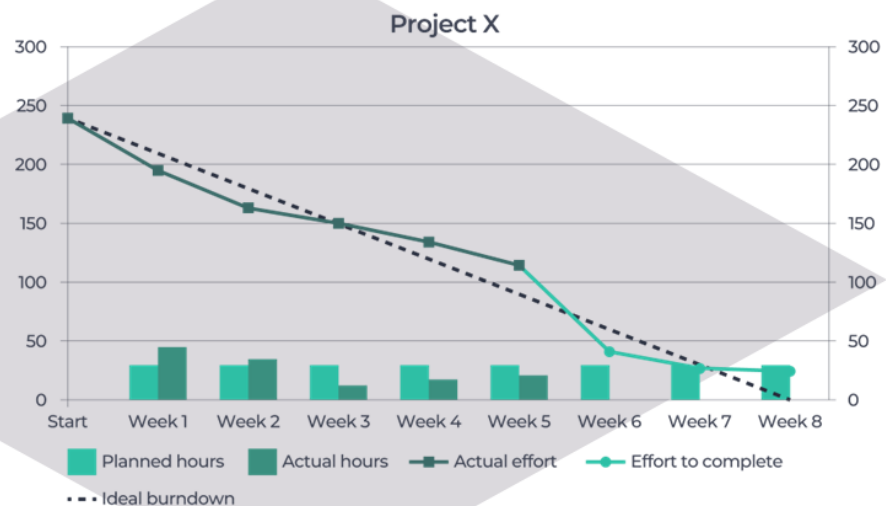
Burn-down charts are the most well-known, showing how much work remains, whereas burn-up charts show how much work has been done

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Burn charts - 2

Burn-down charts identify **estimation issues** early and help viewers understand **how much work and effort remains**



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Supporting techniques – Part THREE

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Retrospectives - 1

Allow team refinement of environment and processes to optimise efficiency

A type of progress review that specifically considers the way of working as opposed to looking at what was produced

Inspect and Adapt



What went well, what can be improved

Action Plan

- People
- Processes
- Tools

Continuous improvement

Increased ownership, engagement, purpose, involvement and trust



An effective retrospective should be planned, structured, and actively facilitated - can be informal, but not as an ineffective unstructured meeting

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Retrospectives - 2

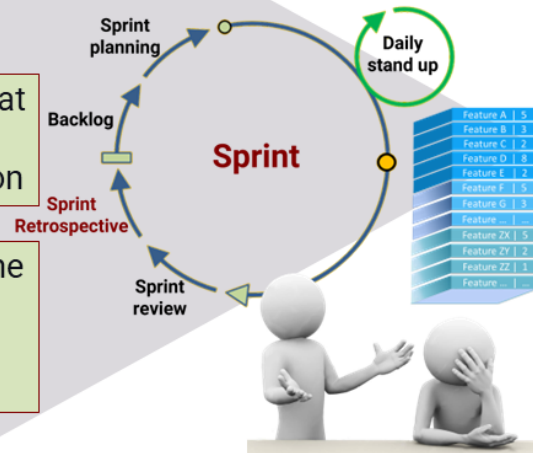
Running an **effective retrospective** is like running a successful workshop, and should consider:

having an **independent facilitator**

focusing on a **small number of issues** that can be actioned, rather than a larger number that are unlikely to result in action

different, creative approaches to keep the retrospectives interesting and useful
visual feedback tools to help people express their ideas

inviting the right people (normally just the team, and possibly **project support**)



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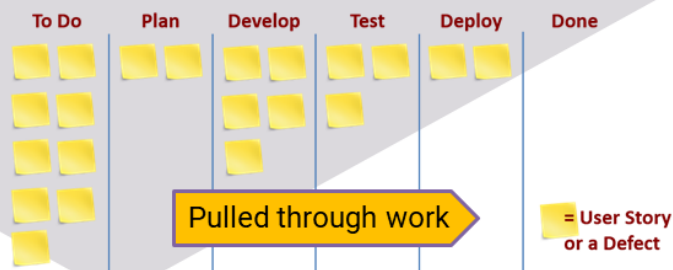
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Kanban board - 1

The **Kanban** tool is a term that covers the use of **Kanban systems**, which are visual management systems to visually display the work in the system, while limiting the number of work items in circulation

It usually comprises a series of columns (and possibly rows) where work items move from left to right as they move through the various states to be completed

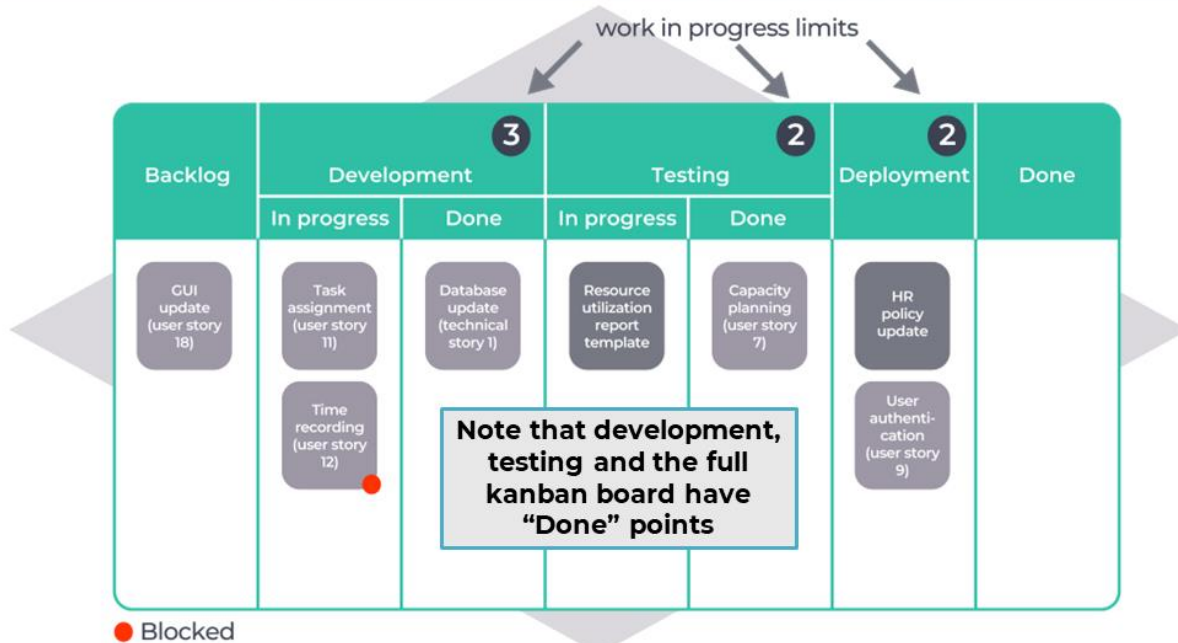
A **Kanban board** acts like a dashboard and enables the team to see blockers and areas where the flow is not smooth



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Kanban board - 2



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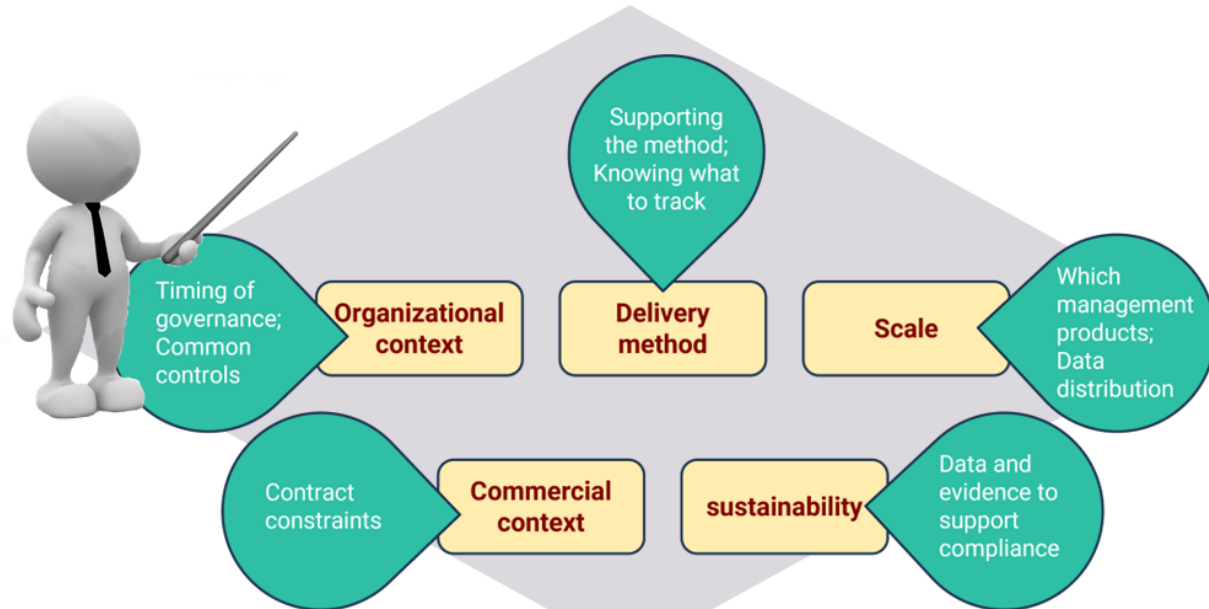
Lesson 12

Applying the progress practice – Part ONE

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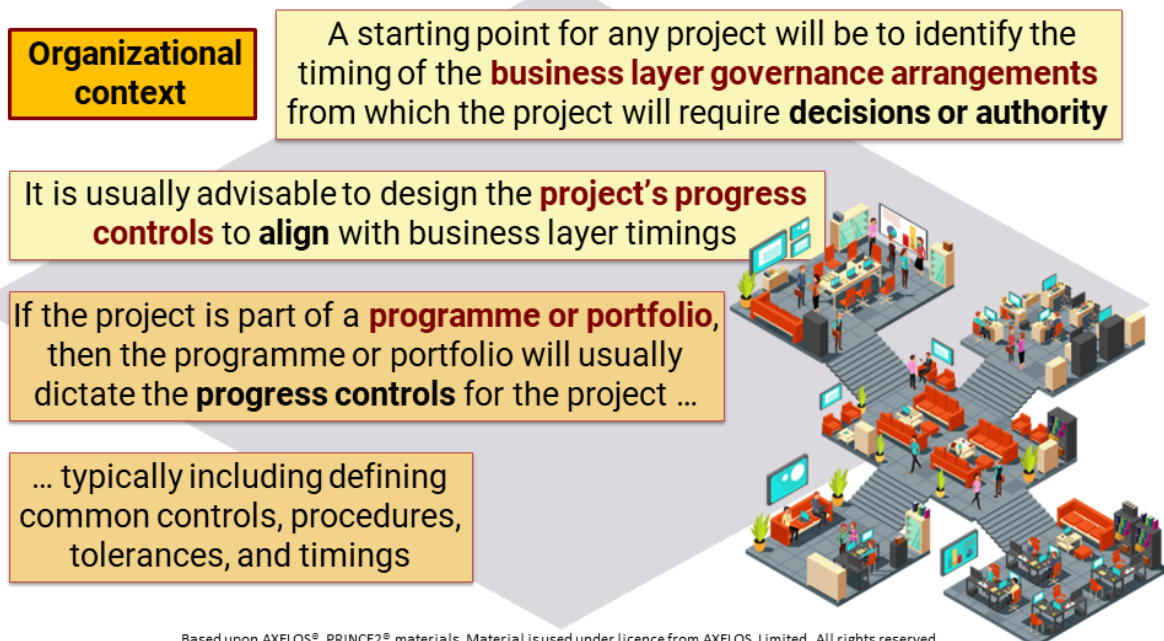
Applying the progress practice



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Applying the progress practice - 1



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Applying the progress practice - 2

Commercial context

PRINCE2 is based on a **customer/supplier environment**

It assumes that there will be a **customer** who will specify the desired result and (usually) pay for the project, and a **supplier** who will provide the resources and skills to deliver that result

Additional considerations apply if the relationship between the customer and the supplier is a **commercial one**

The contract between the parties acts as a constraint on a **project manager's** or **team manager's** degree of freedom when managing the project or work package



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Applying the progress practice - 3

For this reason, it is good practice to ensure that **contracts** reflect and promote good working relations rather than inhibiting them and that any **tailoring to PRINCE2** respects the parties' contract obligations

From a supplier's perspective, the project lifecycle should be defined to consider **pre-contract activities**, such as qualification, designing and costing the solution, bidding, and negotiation ...

... and also consider activities at the end of the project, such as **warranty and maintenance periods**



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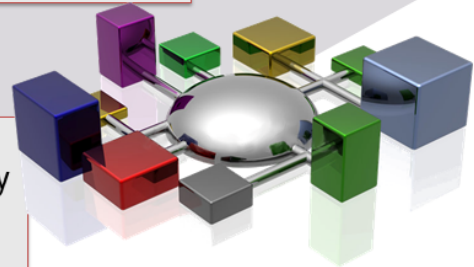
Delivery method - 1

It is important that the approach to **managing progress** works with, and supports, the project's chosen **delivery method** rather than going against it

For a project using **an iterative-incremental delivery method**, it will typically be more appropriate to focus on tracking how **much of the requirement** is being met by the **end of the sprint** rather than how long it will take to **complete the products**

The tolerances would have been set by this

The frequent delivery of **products** that meet their **acceptance and quality specifications** is a primary source of **progress information** and provides the basis for forecasting **future progress**



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Delivery method - 2

Reporting formality may differ in **an iterative-incremental project** using **agile** techniques such as Kanban and burn-down or burn-up charts

Checkpoint reporting may be based on a **pull system (Kanban)**, where the **project manager** reviews the charts maintained by the development teams rather than being sent by them

By contrast, for a project using a **linear-sequential delivery method**, the focus may be on when the stage's products will be complete and for what costs

In this way, the **project board** can be confident that there is a robust basis to move from the current stage to the next



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Lesson 13

Applying the progress practice – Part TWO

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Sustainability - 1

Progress management will gather data on those sustainability aspects recorded in the **project initiation documentation** that are critical success factors for the project

Progress management must be able to identify and report on the data required to support this evidence

This is to check that the project remains within its **sustainability tolerances** and the parameters established by the business layer



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Sustainability - 2

Some areas of **sustainability** will fall under legislation, regulation, or business layer policies, and will require **evidence** to support compliance



Advice should be sought from the **quality assurance** function with the business or programme

The **project executive** may request an **audit** of the project if compliance against **sustainability regulations** is required



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Sustainability - 3

Sustainability reporting should not be separate from the agreed **reporting requirements** but rather **integrated** into the cyclical analysis of the **project data** by the project manager, team managers, and project support



The activities in the **plans** should consider the data needed to satisfy **sustainability analysis**, just as they should for the other **tolerances** within the project

This is so that evidential **reporting on sustainability** is a **consequence of progress management** and not something that requires additional activities or resources

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Scale - 1

Progress management needs to be applied or tailored to reflect the needs of the project's scale, risk, complexity, and prominence

In simple projects where risk and complexity are minimal, **the progress practice** may lend itself to some **simplified data analysis** for reporting and forecasting purposes

Some of the roles may have been **combined** with a **project executive** sponsoring the project **without a project board**

The style may be more relaxed, and this could lead for example to the project manager to **report progress** in a **structured email** rather than a formal report



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Scale - 2

For simple projects, questions that may be asked are:

do **all** the **management products** need to be used?

could some of the **management products** be **combined**?

could the **data** be distributed more **effectively and efficiently**?

could access to the data be given to stakeholders following **the digital and data management approach**?



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Scale - 3

As the **projects** become **more complex** and attract **more risk**, the project business may include more stakeholders with different reporting requirements

Under these circumstances, a more **formal approach** to evaluation and reporting, either through structured reports or using data and systems, will be required to satisfy the **stakeholder requirements**

The **project executive or project board** must agree on the **frequency of reporting** and have the project manager record their requirements in the **project initiation documentation**



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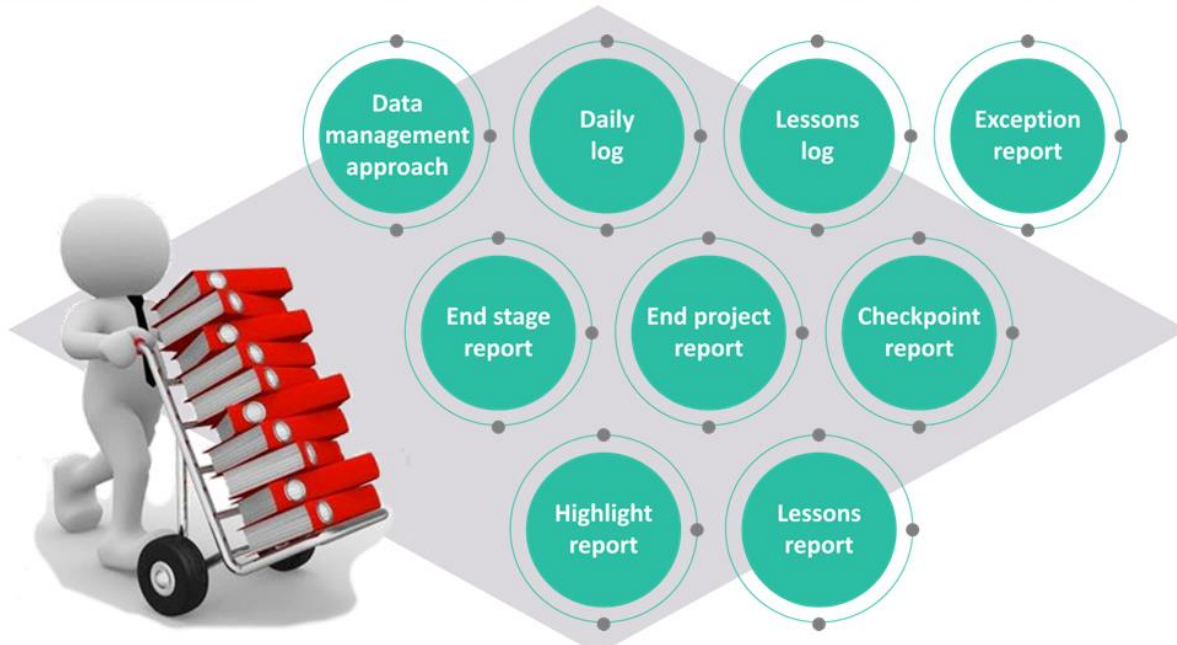
Lesson 14

Progress management
products – Part ONE

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Progress practice management products

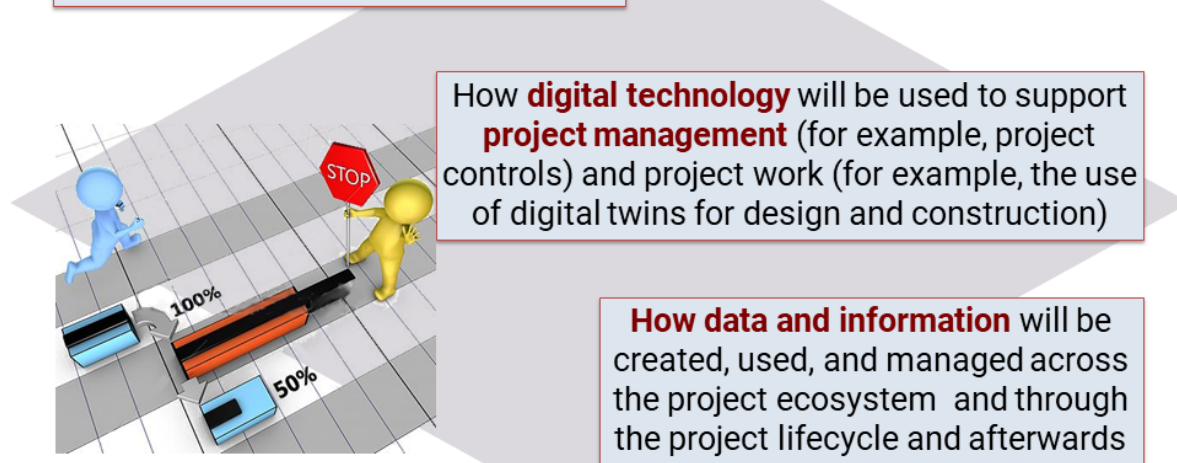


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The Data management approach - 1

The purpose of the digital and data management approach is to describe:



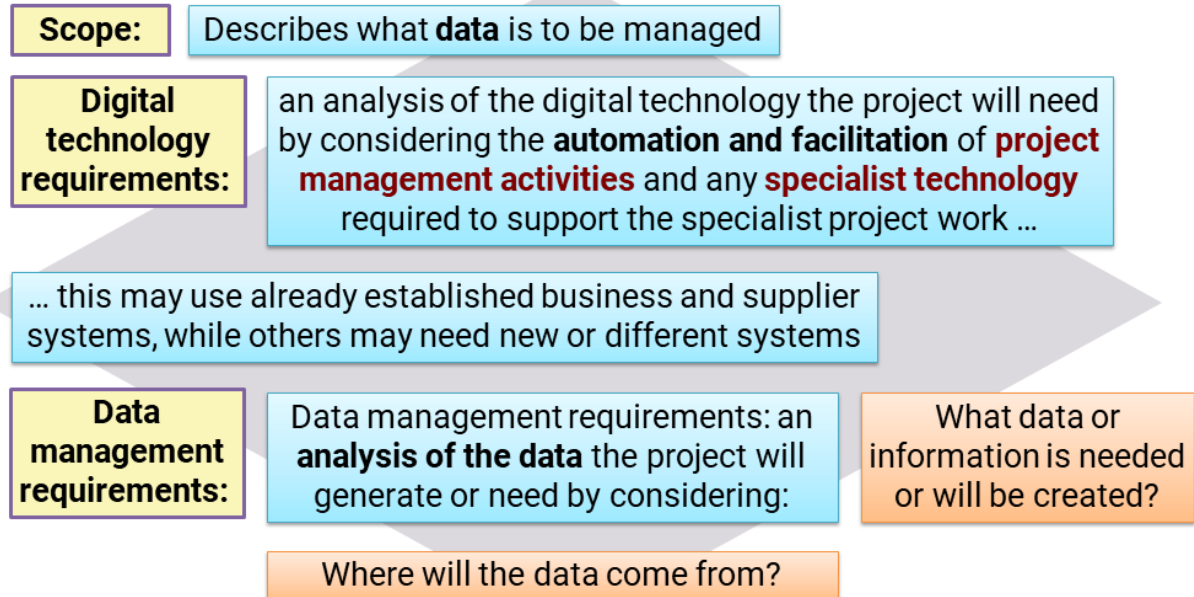
How **digital technology** will be used to support **project management** (for example, project controls) and project work (for example, the use of digital twins for design and construction)

How **data and information** will be created, used, and managed across the project ecosystem and through the project lifecycle and afterwards

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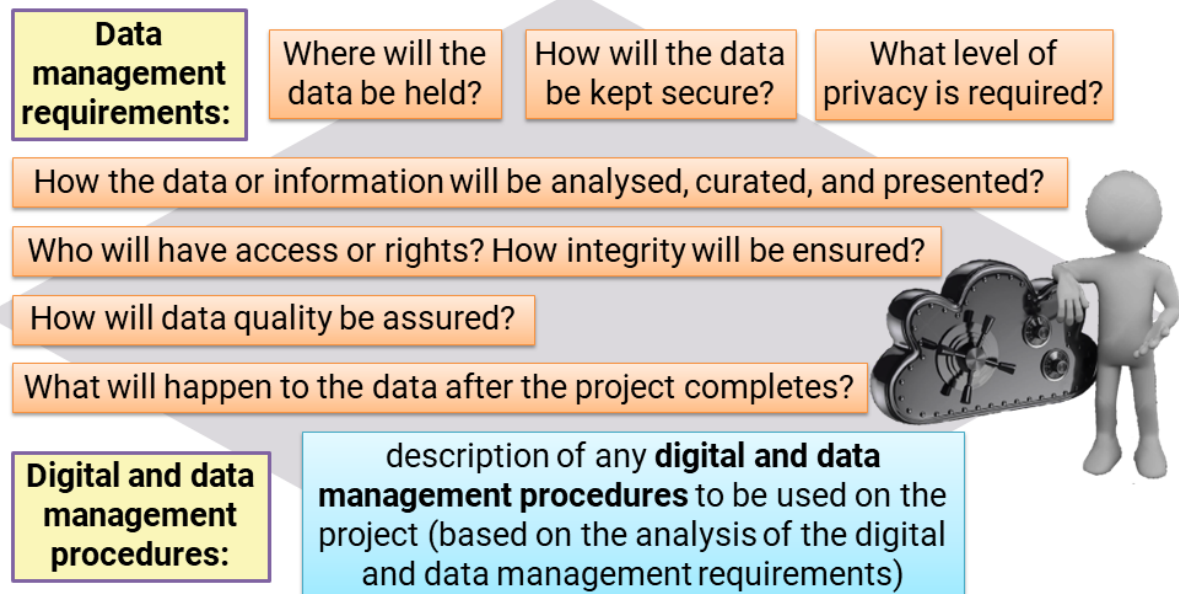
The Data management approach - 1



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The Data management approach - 2



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The Data management approach - 3

Responsibilities:

who will be responsible for the roles associated with the digital and data management approach

Timing formal digital and data management activities:

for example, the implementation of systems, the timing of any data audits, or the provision of a data room to support procurement activities

Supporting tools or systems:

describes what tools or systems that will be used for digital and data management. For example, the use of artificial intelligence (**AI**) in project forecasting

Standards:

describes digital and data management standards required for the project

References:

for any associated documents or products



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The Daily log - 1

The purpose of the daily log is to record informal issues, required actions, or significant events not captured by other PRINCE2 management products

It can act as the **project diary** for the project manager

It can also be used as a **repository** for **issues and risks** during the **starting up a project** process if the other registers have not been set up

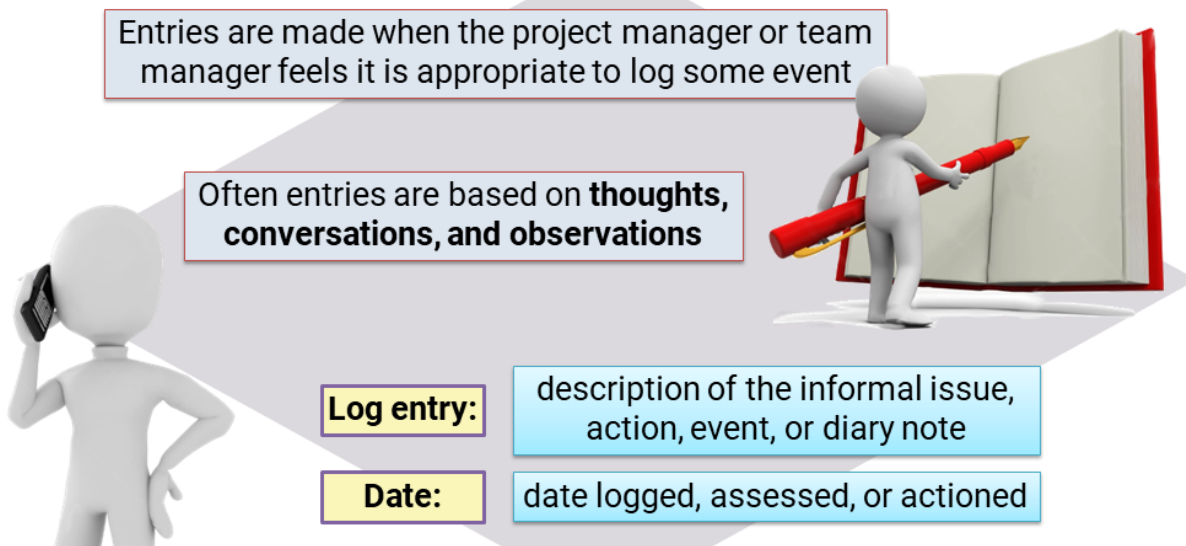


There may be **more than one** daily log, as **team managers** may elect to have one for their **work packages**, separate from the project manager's daily log

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The Daily log - 2



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Lesson 15

Progress management
products – Part TWO

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The lessons log - 1

The purpose of the lessons log is to provide a repository to record lessons **that apply to this project or future projects**

Some lessons may originate from **other projects** and should be captured on the lessons log for **input** to the project's approaches and plans

Some lessons may originate from **within the project**, where new experience (both good and bad) can be applied to this project and/or transferred to others



Lesson identifier:

reference for the lesson

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The lessons log - 2

Lesson description:

lesson summary and details, e.g. the effect (such as positive/negative financial impact), known cause/trigger, early warning indicators, previously a risk? (threat or opportunity), recommendations

Lesson type:

for example, **team** lesson, **project** lesson, **business** layer lesson

Lesson owner:

who is responsible for **actioning** any learning from the lesson (could be from a team, the project, or the business)

Grading:

a rating of **priority and severity**

Status:

the current lessons status of the lesson, e.g. logged, reviewed, learning actioned (by project), learning actioned (by business)

Relevant lesson dates:

for example, date raised, date last reviewed, action due dates, date resolved

Records:

list of the documents associated with the issue and their location

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The checkpoint report - 1

The purpose of a checkpoint report is to report to the project manager the **status of the work package** at a frequency defined in the work package

Executive summary:

team manager's report

Period:

the reporting period covered by the checkpoint report

Follow-ups:

the outstanding items from **previous reports** (for example, action items completed or unresolved)

This reporting period:

the products being developed by the team during the reporting period; the products **completed** by the team during the reporting period; quality management activities performed during the period; lessons identified

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The checkpoint report - 2

Next reporting period:

the products being **developed** by the team in the next reporting period; the products **planned** to be completed by the team in the next reporting period; **quality management activities** planned for the next reporting period

Work package tolerance status:

how execution of the work package is performing against its **tolerances** (for example, cost/time/scope actuals and forecast)

Issues and risks:

an update on issues and risks associated with the work package



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The highlight report - 1

The purpose of a highlight report is to provide the **project board** (and possibly other stakeholders) with a summary of the **stage status** at intervals defined by them

Executive summary: project manager's report

Period: the reporting period covered by the highlight report

Follow-ups: the outstanding items from previous reports (for example, action items completed or unresolved)

This reporting period:

the actual progress of **work packages**, including those pending authorization, in execution, and completed in the period (if any work packages are being performed by external suppliers, this information may be accompanied by purchase order and invoicing data);

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The highlight report - 2

This reporting period:

products completed in the period; **products planned** but not started or completed in the period (providing an early warning indicator or potential breach of time tolerance); any **corrective actions** taken during the period

Next reporting period forecast:

progress of work packages, including those to be authorized, and in **execution** (if the work packages are being performed by external suppliers, this information may be accompanied by purchase order and invoicing data)

products to be completed in the next period; corrective actions to be completed during the next period

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The highlight report - 3

Stage and project tolerance status:

how execution of the project and stage are performing against their **tolerances** (for example, cost/time actuals and forecast)

Key issues and risks:

a summary of the actual or potential issues and risks (including a list of requests for change or off-specifications raised, actioned, or pending for the period)

Lessons (if appropriate):

a review of what went well, what went badly, and any recommendations for consideration by the business; sourced from the **lessons log** or any lessons reports that may exist



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Lesson 16

Progress management products – Part THREE

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The lessons report - 1

The purpose of a lessons report is to share lessons and trigger actions to ensure that lessons become embedded in the appropriate organization's way of working

A lessons report can be created at any time in a project and should not necessarily be delayed until the end

Typically, it can be included as part of the **end stage report** or **end project report**

It may be appropriate (and necessary) that there are **several lessons reports** specific to a particular organization (for example, user, supplier, business)



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The lessons report - 2

Executive summary: A summary of the lesson

Description for work package, stage, or project lessons:

a review of what went well, what went badly, and recommendations for this project or future projects

Description for a specific lesson:

the effect (for example, positive/negative financial impact), cause/ trigger if known/proven, whether there were any **early warning indicators**, whether it was **previously identified as a risk** (threat or opportunity), **recommendations** for this project or future projects.



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The exception report - 1

The purpose of an exception report is to inform the **project board** when a stage plan or project plan is **forecast to exceed tolerance levels** set and to offer options and recommendations for the way to proceed

Identifier: Unique identifier for the exception

Date: Date issued

Description: An overview of the exception being reported

Cause of the exception: a description of the **cause of a deviation** from the current plan



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The exception report - 2

Consequences of the exception:

what the **implications** are if the deviation is not addressed for the project and the business

Options:

what options are available to **address the deviation** and the effect of each option on the business case, risks, and tolerances

Recommendation:

Which available **option** which is recommended and why

Lessons:

what can be learned from the exception, on this or future projects



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The end stage report - 1

The purpose of an end stage report is to give a summary of progress to date, the overall project situation, and sufficient information to ask for a **project board decision** on what to do next with the project

Executive summary:

project manager's report

Performance review:

a **review** of the business case, project objectives, stage objectives, team performance, quality activities, products' status, phased handover of products (if applicable), and lessons



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The end stage report - 2

Summary of follow-on action recommendations:

actions to be taken by the **business** following the phased handover of any products during the stage

Key issues and risks:

a summary of the actual or potential issues and risks (including a list of requests for change or off-specifications raised, actioned, or pending for the period)

Forecast:

for the **next stage and project** against targets and their **tolerances**



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The end project report

The purpose of the end project report is to review how the project performed against the version of the **project initiation documentation** used to authorize it

Executive summary:

Project manager's report

Performance review:

a review of the business case, project objectives, and team performance

Product review:

a review of products, off-specifications, project product handover, and lessons

Summary of follow-on action recommendations:

any **post-project actions** to be taken by the business or supplier(s)



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Module 17

Lesson 17

Progress practice key roles – Part ONE

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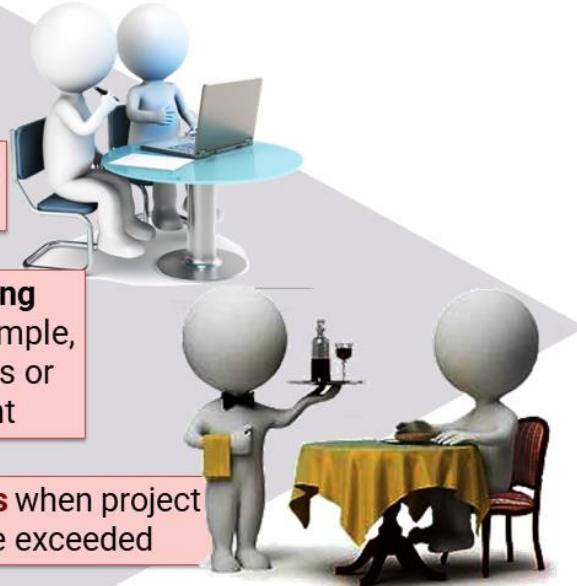
Progress practice Business layer

**Business
(commissioning) layer**

set project tolerances and document them in the **project mandate**

provide any business layer **reporting requirements** and standards, for example, periodic timings for highlight reports or health and safety specific content

make decisions on **exception reports** when project level tolerances are forecast to be exceeded



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Project executive responsibilities

**Project
executive**

set stage tolerances

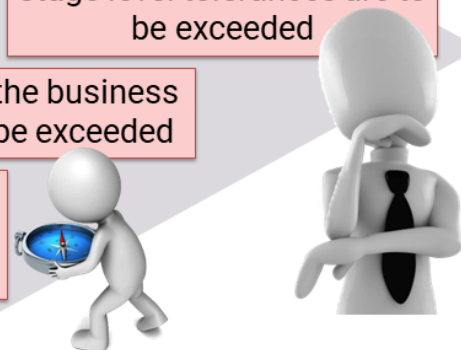
ensure that progress towards the outcome remains consistent from the **business perspective**

approve the **digital and data management approach** from the business perspective, for example, the treatment of **legacy data** on **project closure**

make decisions on **exception reports** if forecast stage level tolerances are to be exceeded

recommend future action on the project to the business layer if the **project tolerance** is forecast to be exceeded

remain accountable to the business on project **sustainability** reporting and for sharing project lessons with the business



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Senior user responsibilities

Senior user

agree the **digital and data management approach** from a user's perspective, for example, the handover of product data for operational and maintenance needs

define sustainability reporting requirements from the user perspective

ensure that progress towards the outcome remains consistent from the user perspective



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Senior supplier responsibilities

Senior supplier

agree the **digital and data management approach** from a supplier's perspective, for example, any specialist technology to be used or provided by the supplier or... expectations on data to be provided by the business and to be transferred to the business

remain responsible for sustainability reporting from the supplier perspective

ensure that progress towards the outcome remains consistent from the supplier perspective



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Project manager responsibilities - 1

**Project
manager**

consult with **stakeholders** to prepare and maintain the **digital and data management approach**

ensure that **team managers** implement the **data management procedures** agreed in their **work package description**

authorize work packages and set **work package tolerances**

establish and maintain the **project log**

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Project manager responsibilities - 2

**Project
manager**

monitor progress against **stage plans**

produce lessons reports, highlight reports, exception reports, end stage reports, and the end project report

remain responsible for **sustainability reporting** from the project perspective

produce exception reports for the **project board** when **stage level or project level tolerances** are forecast to be exceeded

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Module 17

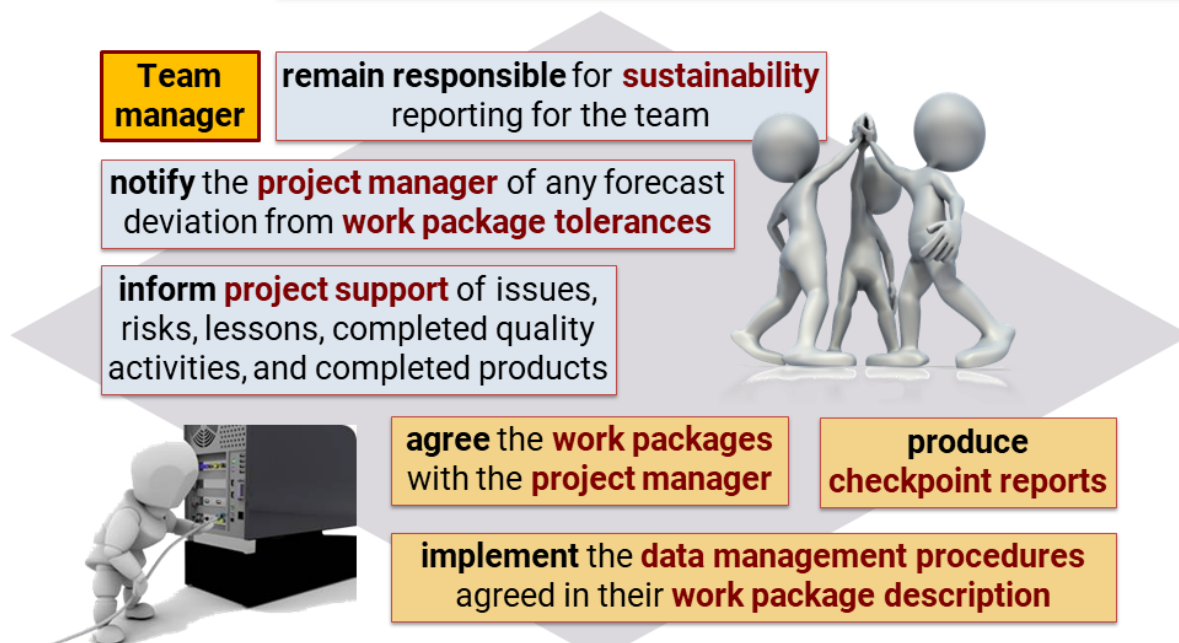
Lesson 18

Progress practice key roles – Part TWO

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Team manager responsibilities



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Project assurance responsibilities - 1

**Project
assurance**

advise the **project manager** on the **digital and data management approach**

confirm to the **project board** that the **digital and data management approach** is compliant with business policies

confirm stage and project progress against agreed **tolerances**



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Project assurance responsibilities - 2

**Project
assurance**

check the **business case** against project progress and any external events

assist the **project board** and **project manager** when asked by reviewing exception reports for impacts against the **business case**

assure **project board** members that data is being managed appropriately by reviewing **data management practices** to ensure they are performed in line with the project's **digital and data management approach**



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Project support responsibilities

Project support

assist the **project management team** with implementing and applying the **digital and data management approach**

administer **specialist tools** to support the **digital and data management approach** (such as planning, control, and reporting tools)

assist the **project manager** in maintaining the **project log**

assist with the compilation, dissemination, and storage of reports (checkpoint report, exception reports, lessons report, end stage report, end project report)



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PRINCE2 7th Edition PROJEX ACADEMY

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Module 17

Lesson 19

Progress practice principles

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Progress practice principles - 1

The **progress practice** contributes to the adherence to **PRINCE2 principles** across the **project lifecycle**

Ensure continued business justification

Achieved by:

checking viability of the **business case** when **progress** is reviewed periodically at stage boundaries and for exceptions

Resulting in:

more appropriate decisions on the ongoing **viability** of the project as it progresses



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Progress practice principles - 2

The **progress practice** contributes to the adherence to **PRINCE2 principles** across the **project lifecycle**

Learn from experience

Achieved by:

identifying lessons from the output of progress management; applying forecasting techniques based on progress management

Resulting in:

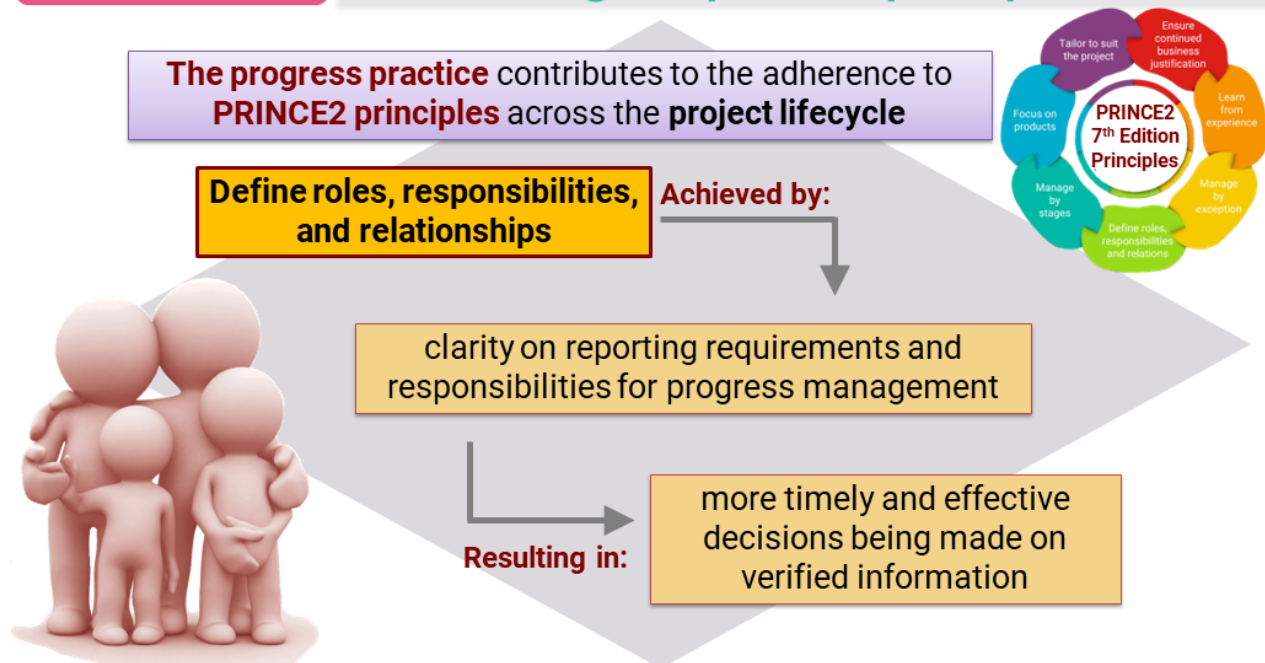
lessons being applied to the project or other projects to avoid future unnecessary issues or risks; more accurate predictions or estimates about the ongoing project future



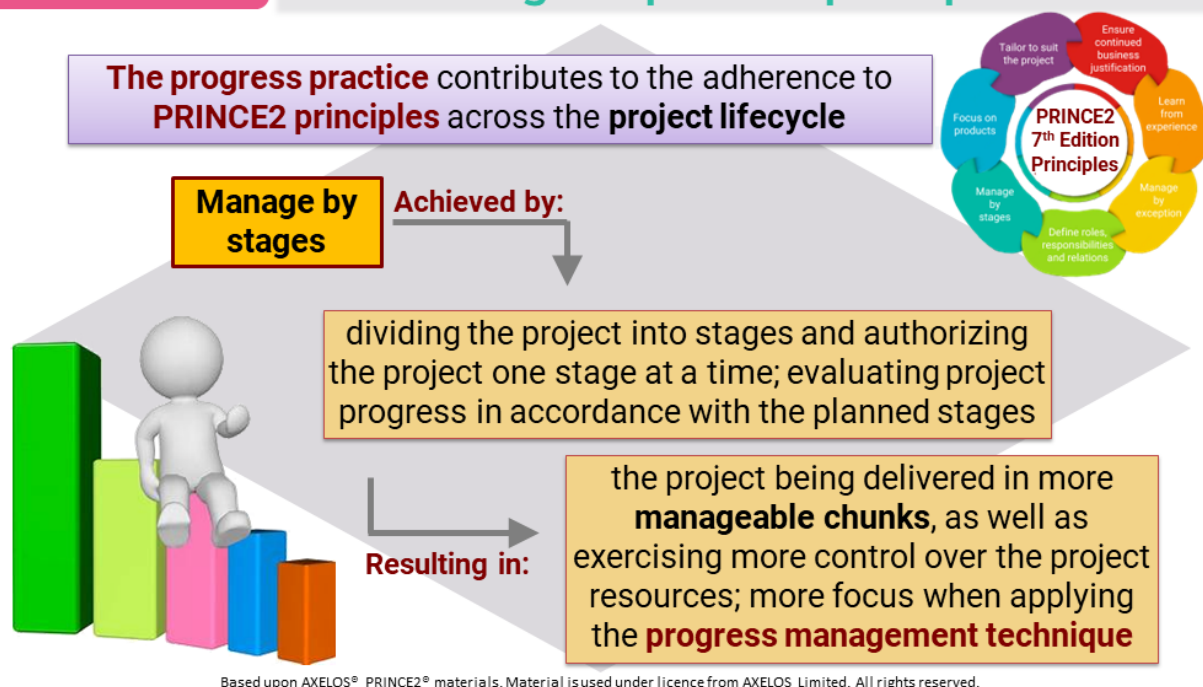
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Progress practice principles - 3

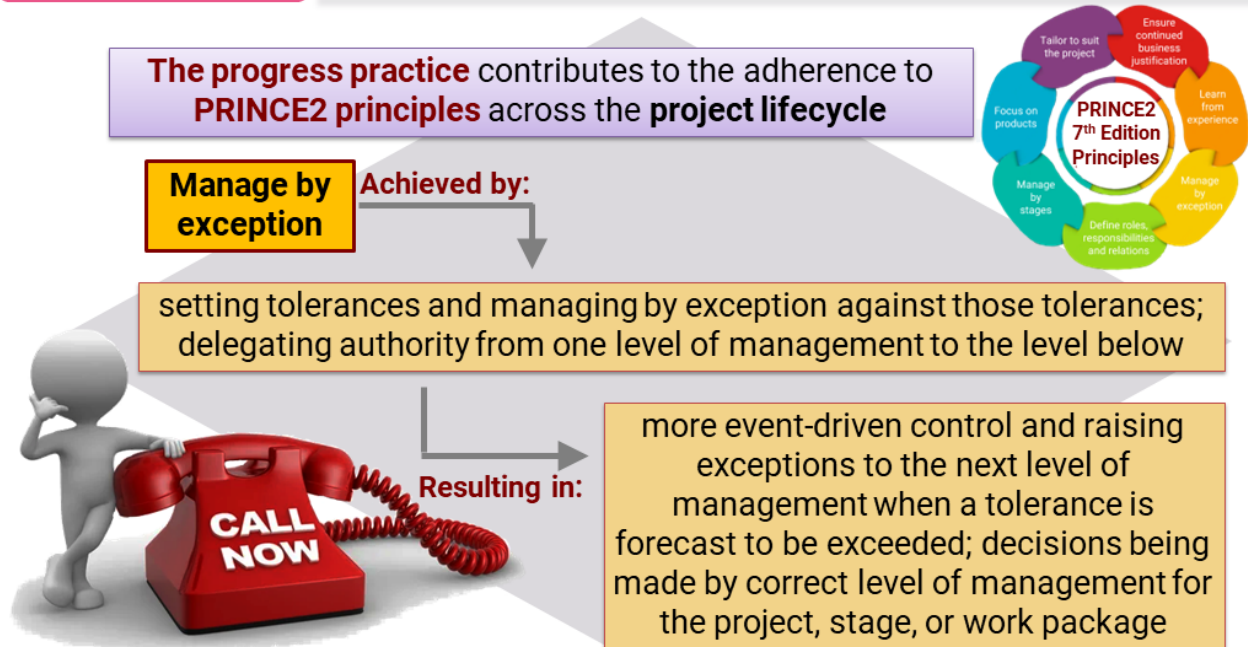
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Progress practice principles - 4



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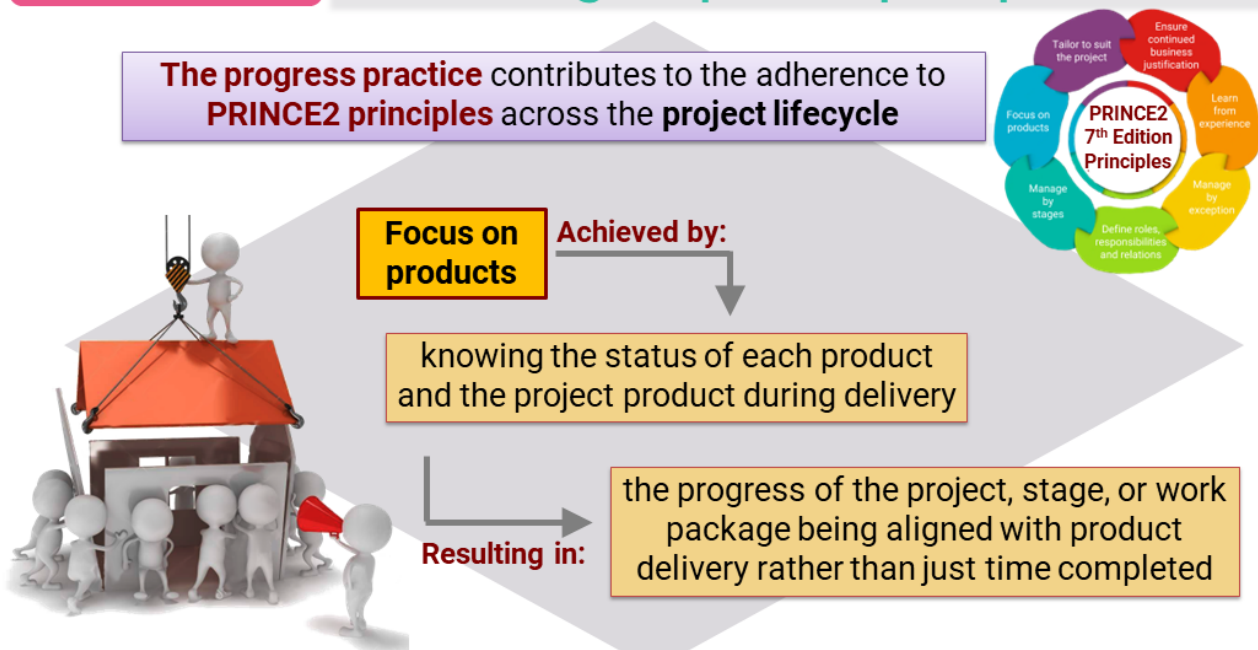
Progress practice principles - 5



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Progress practice principles - 6



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Progress practice principles - 7

The **progress practice** contributes to the adherence to **PRINCE2 principles** across the **project lifecycle**

Tailor to suit the project

Achieved by:

defining the approach to controlling progress; setting tolerances and controls (event-driven and time-driven) appropriate to the risk, complexity, and size of the project at project, stage, and work package levels

Resulting in:

The project team understand how the project will be monitored and controlled; the right level of progress management, monitoring, and control commensurate with the risk, complexity, and project size



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Well Done! on completing Module 17!

PART ONE	PART TWO	PART THREE	PART FOUR	PART FIVE
Module 1 PRINCE2 Overview ✓	Module 4 Starting Up a Project ✓	Module 7 Initiating a Project ✓	Module 10 Product-based Planning ✓	Module 13 Controlling a Stage ✓
Module 2 PRINCE2 Principles ✓	Module 5 Organizing Practice ✓	Module 8 Risk Practice ✓	Module 11 Plans Practice ✓	Module 14 Managing Product Delivery ✓
Module 3 People ✓	Module 6 Business Case Practice ✓	Module 9 Quality Practice ✓	Module 12 Directing a Project ✓	Module 15 Managing a Stage Boundary ✓
PART SIX	Module 16 Issues Practice ✓	Module 17 Progress Practice ✓	Module 18 Closing a Project	

Don't forget to carry out the module workshops!

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PRINCE2 7th Edition Module 6 Exercises



The objective of these exercises is **NOT** to replicate exam questions, but rather to test how much you have absorbed from the PRINCE2 7th Edition syllabus information within the video lessons.

I strongly recommend that you watch each video at least once, and you may find it helpful to skim over video sections for clarification.

I have deliberately not provided answers as I want to encourage you to go back over any video sections that you need to review to obtain the answer. I have included in this handbook graphics of each presentation slide used for each video, and you may prefer to use those instead of the videos.

Finding topic areas, you need to review is a powerful way of honing your PRINCE2 knowledge and gaining a pass in your exams.

1. Fill in the gaps. The purpose the progress practice: To -----
----- actual achievements against those -----: and establish -----
----- to ----- actual achievements against those planned
2. Fill in the gaps. A key component of project management is controlling the -----
-----, which ensures that the project remains ----- against
its approved -----
3. Fill in the gaps. If a stage or the project is forecast to -----
-----, it no longer has the approval of the -----
4. The team manager has raised an issue advising you (the project manager), that the work package is forecast to exceed its tolerances. Name the steps and sequence of the next steps and management products that are used
5. The progress practice is based on what cycle?
6. Define the term progress
7. Define the term exception
8. Define the term forecast

9. The project is managed by exception between four management levels against tolerances for seven performance targets. Describe what those levels are and the tolerances levels that are set
10. What are the SIX logs/registers contained within the project log?
11. A projects time, cost, scope and risk tolerances are set in what THREE management products?
12. The definition of tolerance is: "Tolerances are the ----- above and below a plan's ----- without escalating the deviation to -----"
13. In which management product are benefit tolerances set?
14. In which TWO management products are quality tolerances set, and what are their metrics?
15. In which FOUR management product are sustainability tolerances set?
16. What are the two control types in PRINCE2, give examples of each
17. In which management products are informal issues captured and managed?
18. What information does the product register hold and how is it used?
19. What factors would influence the project frequency of reporting?
20. Which type of control is the lessons report?
21. What is the definition of a PRINCE2 lesson?
22. Name examples of when lessons may be captured
23. The analysis of a lesson should answer five questions in a specific order: Describe each and their sequence.
24. What are the SEVEN project performance targets?

25. What does the digital and data management approach describe?
26. For stage level exceptions: The project manager should produce ----- to capture and analyse the data behind the deviation and then provide ----- for the project board
27. The project board have just been advised that the current stage is in exception. Name the possible action options they may take
28. Data and technology help manage projects more accurately by supporting progress tracking and decision-making. What part does data analytics play?
29. How might the use of AI assist the project manager in progress tracking?
30. PRINCE2 states several techniques that can be used to support the progress practice. How many can you name and describe?
31. Fill in the blank: A ----- identifies estimation issues early and help viewers understand how much work and effort remains
32. Describe a Kanban board
33. What sort of environment is PRINCE2 based upon?
34. When using an iterative-incremental delivery method, what would the tracking focus be on?
35. What roles and management products may be combined in a small-scale project?
36. What is the purpose of the data management approach document?
37. What is the purpose of the daily log?
38. What is the purpose of the lessons log?
39. What is the purpose of the lessons report?
40. What is the purpose of the exception report?

- 41. What is the purpose of the end stage report?
- 42. What is the purpose of the end project report?
- 43. What is the purpose of the checkpoint report?
- 44. What is the purpose of the highlight report?
- 45. What is the purpose of the lessons report?
- 46. With regard to the progress practice, what are the responsibilities of the executive?
- 47. With regard to the progress practice, what are the responsibilities of the project manager?
- 48. Regarding the progress practice, what is the key approach document that the senior user, senior supplier and project assurance roles need to agree?
- 49. How does the progress practice support each of the SEVEN principles?
- 50. How does the progress practice support forecasting?

FOUNDATION QUESTIONS

1. What is the purpose of the progress practice?

- A. To forecast whether the stage is on track to deliver on time and within budget
- B. To capture information to enable past mistakes to be avoided by this project, or other projects
- C. To decide what to do about a product that does not meet quality specifications
- D. To ensure that the user's quality expectations are met by the delivery of the outputs

2. Which should be reviewed by the project board when making the decision about what to do next with the project?

- A. Digital and data management approach
- B. End stage report
- C. Highlight report
- D. Checkpoint report

3. What is the definition of an exception?

- A. A forecast that there will be a deviation beyond agreed tolerance levels
- B. An uncertain event that, should it occur, will have an effect on the achievement of objectives
- C. A product that will not meet its quality specifications
- D. A report to the project manager on the status of the work package

4. How should the use of data and systems support effective progress management?

- A. By focusing the efforts of the project management team on collecting data about what has happened in the past
- B. By providing accurate data to assist in predicting future project performance
- C. By focusing the efforts of the project management team on manual data collection
- D. By defining the tolerances against the seven performance targets for each management level

5. According to the exception management technique, at which levels are projects MOST LIKELY to identify issues that exceed stage tolerances?

- A. Commissioning AND directing
- B. Directing AND managing
- C. Directing AND delivering
- D. Managing AND delivering

6. Which statement BEST describes where progress should be monitored?

- A. At stage boundaries at the end of each stage
- B. At the project, stage, and work package level
- C. At the product delivery level
- D. At project closure when project costs are being calculated

7. The project manager needs to inform the project board of what approved products are outstanding before the project board approves further work.

In which management product should the project manager record this information?

- A. Checkpoint report
- B. Highlight report
- C. End stage report
- D. End project report

8. Identify the missing word in the following sentence:

The business layer, outside the project team, sets the overall requirements and [?] levels for the project.

- A. Tolerance
- B. Issue
- C. Forecast
- D. Risk

FOUNDATION ANSWERS

1. What is the purpose of the progress practice?

A. To forecast whether the stage is on track to deliver on time and within budget

B. To capture information to enable past mistakes to be avoided by this project, or other projects

C. To decide what to do about a product that does not meet quality specifications

D. To ensure that the user's quality expectations are met by the delivery of the outputs

A. Correct. "The purpose of the progress practice is to: establish mechanisms to monitor and compare actual achievements against those planned [and] provide a forecast for the project's objectives and continued viability."

2. Which should be reviewed by the project board when making the decision about what to do next with the project?

A. Digital and data management approach

B. End stage report

C. Highlight report

D. Checkpoint report

B. Correct. The end stage report is used "to give a summary of progress to date, the overall project situation, and sufficient information to ask for a project board decision on what to do next with the project."

3. What is the definition of an exception?

A. A forecast that there will be a deviation beyond agreed tolerance levels

B. An uncertain event that, should it occur, will have an effect on the achievement of objectives

C. A product that will not meet its quality specifications

D. A report to the project manager on the status of the work package

A. Correct. An exception is "A situation where it can be forecast that there will be a deviation beyond the tolerance levels agreed between the project manager and the project board (or between the project board and business layer)."

4. How should the use of data and systems support effective progress management?

A. By focusing the efforts of the project management team on collecting data about what has happened in the past

B. By providing accurate data to assist in predicting future project performance

C. By focusing the efforts of the project management team on manual data collection

D. By defining the tolerances against the seven performance targets for each management level

B. Correct. As part of 'use of data and systems in progress management', "data and technology help manage projects more accurately by supporting progress tracking and decision-making." In addition, "Progress reviews are not confined to looking backwards. After having secured and stored the data through systems, past performance can be used to predict future performance."

5. According to the exception management technique, at which levels are projects MOST LIKELY to identify issues that exceed stage tolerances?

A. Commissioning AND directing

B. Directing AND managing

C. Directing AND delivering

D. Managing AND delivering

D. Correct. As part of the exception management procedure, "issues are often encountered in the delivering level of the project that will take the stage outside one of the stage tolerances. It may also occur during the managing level for those issues that are not driven from delivery problems."

6. Which statement BEST describes where progress should be monitored?

A. At stage boundaries at the end of each stage

B. At the project, stage, and work package level

C. At the product delivery level

D. At project closure when project costs are being calculated

B. Correct. "A key component of project management is controlling the project's progress, which ensures that the project remains viable against its approved business case. Progress control involves measuring actual progress against the performance targets of benefits, time, cost, quality, scope, sustainability, and risk. This information is used to make decisions such as whether to approve a stage or work package, whether to escalate deviations, or whether to prematurely close the project, and to take actions as required. Progress can be monitored at work package, stage and project level."

7. The project manager needs to inform the project board of what approved products are outstanding before the project board approves further work.

In which management product should the project manager record this information?

A. Checkpoint report

B. Highlight report

C. End stage report

D. End project report

C. Correct. End stage reports are produced by the project manager at the end of each stage "to give a summary of progress to date, the overall project situation, and sufficient information to ask for a project board decision on what to do next with the project." A stage is defined as "the section of a project that the project manager is managing on behalf of the project board at any one time."

8. Identify the missing word in the following sentence:

The business layer, outside the project team, sets the overall requirements and [?] levels for the project.

A. Tolerance

B. Issue

C. Forecast

D. Risk

A. Correct. The business layer, outside the project team, sets the overall requirements and tolerance levels for the project."

PRACTITIONER QUESTIONS

Here are three items of information about the 'progress' of the project.

Which management product (A-E) should they be recorded in?

Choose only **ONE** product for each piece of information. Each product can be used once, more than once, or not at all.

- A. Exception report
- B. Daily log
- C. Highlight report
- D. Checkpoint report
- E. End project report

1. During stage 2, the time tolerance is +1 week. The project manager forecasts that a delay to the media training will result in a 2-week delay to the stage
2. The project had repeated issues with more staff leaving NowByou during the project than originally expected. This resulted in extra training of new staff members in media usage and caused delays throughout the project
3. The research team manager delivering the options analysis work package has collected data to inform the project manager about how the options analysis is progressing
4. The project is in stage 1 and the Contracted Project Manager is drafting the controls to be included in the project initiation documentation. The Contracted Project Manager has identified that the project management maturity of NowByou is low. As a result, they suggested that the stage 2 plan should include details of what is to be achieved week by week. This will enable more frequent reporting against the stage plan by the team managers gathering the high-level requirements and completing the options analysis.

Is this an appropriate application of the 'progress' practice, and why?

- A. Yes, because the project management maturity of the organization is very low, and reporting should be more frequent when teams are inexperienced
- B. Yes, because the project manager should negotiate the effort, cost and time to deliver each of the work packages with the team managers

C. No, because the team managers should be allowed to control the work of the work packages within the tolerances agreed with the project manager

D. No, because the project manager should have agreed tolerances for each of the seven types of tolerance with the team managers to enable control

5. The project is in stage 1 and tolerances need to be defined. The Contracted Project Manager is holding a workshop with the Director of Campaigns and other project board members. They need to decide whether delivering a high-quality campaign that will generate more donations and awareness is more important than on time delivery.

Is making this decision an appropriate application of the 'progress' practice, and why?

A. Yes, because the project board should 'manage by exception' by monitoring progress against the project plan

B. Yes, because the project board should prioritize the constraints in order to allocate tolerances for the project and each stage

C. No, because the project manager should work with the team managers to prioritize the constraints and set work package tolerances

D. No, because the project manager should include the required level of detail in the project plan to enable control by the project board

Here are three items of information relating to the 'progress' practice.

Which management product (A-E) should they be recorded in?

Choose only **ONE** option. Each option can be used once, more than once or not at all.

A. Exception report

B. Daily log

C. Highlight report

D. Checkpoint report

E. End project report

6. At the end of stage 3, the Director of Campaigns stated that the implementation of the chosen option had gone well. But the Marketing Agency advised that that the TV

campaign would have been more successful if it had been run at the same time as the social media campaign.

7. The time tolerance for stage 2 is +1 week. The options analysis has been delayed and the end of the stage will be delayed by two weeks. The project manager has suggested that the stage end should be delayed by two weeks to ensure the options are fully considered before implementing the chosen option in stage 3

8. During stage 2, the team manager for the options analysis confirmed that TV advertising would be affordable after all, despite having been worried, earlier in the stage, that it might be too expensive

9. A graduate trainee has just been appointed as project manager from stage 3 onwards.

They have suggested that time-driven controls are not needed, because the project is moving into the final stage where the chosen option is implemented.

Is this an appropriate application of the 'progress' practice, and why?

A. Yes, because event-driven controls should be used once the implementation of the chosen option is underway in the final stage

B. Yes, because the project board should make the decision about how to control the work of stage 3, at the end of stage 2

C. No, because the project manager should update the project board on the stage's progress and status at agreed intervals during stage 3

D. No, because the project manager should report to the project board if the stage 3 tolerances are forecast to be exceeded

10. The project is in stage 1 and the project manager has recorded the following entry in the daily log:

"The Police Liaison Officer has been busy every time I have requested a meeting with them. I need to discuss with the Director of Campaigns why the Police Liaison Officer may be reluctant to engage with me about this project."

Is this an appropriate application of the 'progress' practice, and why?

A. Yes, because this matter should be recorded in the daily log so it can be handled in a discrete manner

- B. Yes, because the project manager should actively record and implement lessons throughout the project
- C. No, because this is an important issue that should be captured in the issue register for resolution
- D. No, because the project manager should produce an issue report to capture and analyse the matter

PRACTITIONER ANSWERS

Here are three items of information about the 'progress' of the project.

Which management product (A-E) should they be recorded in?

Choose only **ONE** product for each piece of information. Each product can be used once, more than once, or not at all.

- A. Exception report
- B. Daily log
- C. Highlight report
- D. Checkpoint report
- E. End project report

1. During stage 2, the time tolerance is +1 week. The project manager forecasts that a delay to the media training will result in a 2-week delay to the stage

A. Correct. This is an issue that exceeds stage tolerance by 1 week.

Therefore, an exception report will need to be sent to the project board "to inform the project board when a stage plan or project plan is forecast to exceed tolerance levels set, and to offer options and recommendations for the way to proceed."

2. The project had repeated issues with more staff leaving NowByou during the project than originally expected. This resulted in extra training of new staff members in media usage and caused delays throughout the project

E. Correct. This is reflecting back on the project and summarizing the issue of high staff turnover. This should be reported as part of the end project report and will lead into the lessons report also. The purpose of the end project report is "to review how the project performed against the version of the project initiation documentation used to authorize it."

3. The research team manager delivering the options analysis work package has collected data to inform the project manager about how the options analysis is progressing

D. Correct. The purpose of a checkpoint report is "to report to the project manager the status of the work package at a frequency defined in the work package." A checkpoint report is issued by a team manager to the project manager.

4. The project is in stage 1 and the Contracted Project Manager is drafting the controls to be included in the project initiation documentation. The Contracted Project Manager has identified that the project management maturity of NowByou is low. As a result, they suggested that the stage 2 plan should include details of what is to be achieved week by week. This will enable more frequent reporting against the stage plan by the team managers gathering the high-level requirements and completing the options analysis.

Is this an appropriate application of the 'progress' practice, and why?

A. Yes, because the project management maturity of the organization is very low, and reporting should be more frequent when teams are inexperienced

B. Yes, because the project manager should negotiate the effort, cost and time to deliver each of the work packages with the team managers

C. No, because the team managers should be allowed to control the work of the work packages within the tolerances agreed with the project manager

D. No, because the project manager should have agreed tolerances for each of the seven types of tolerance with the team managers to enable control

A. Correct. "... for an inexperienced team the project manager or project board may wish to increase the frequency of reporting until sufficient confidence has been gained in the capability of the team." Therefore, "... the stage plan will have to include what needs to be achieved week by week."

5. The project is in stage 1 and tolerances need to be defined. The Contracted Project Manager is holding a workshop with the Director of Campaigns and other project board members. They need to decide whether delivering a high-quality campaign that will generate more donations and awareness is more important than on time delivery.

Is making this decision an appropriate application of the 'progress' practice, and why?

A. Yes, because the project board should 'manage by exception' by monitoring progress against the project plan

B. Yes, because the project board should prioritize the constraints in order to allocate tolerances for the project and each stage

C. No, because the project manager should work with the team managers to prioritize the constraints and set work package tolerances

D. No, because the project manager should include the required level of detail in the project plan to enable control by the project board

B. Correct. "The project board has overall control at a project level... and will allocate tolerances for each stage to the project manager." To do so, they need "A crucial element of effective planning is understanding which constraints take precedence, to select which approaches to use, and the appropriate tolerances for control."

Here are three items of information relating to the 'progress' practice.

Which management product (A-E) should they be recorded in?

Choose only **ONE** option. Each option can be used once, more than once or not at all.

A. Exception report

B. Daily log

C. Highlight report

D. Checkpoint report

E. End project report

6. At the end of stage 3, the Director of Campaigns stated that the implementation of the chosen option had gone well. But the Marketing Agency advised that that the TV campaign would have been more successful if it had been run at the same time as the social media campaign.

E. Correct. The end project report should include "Product review: a review of products, off-specifications, project product handover, and lessons." Here, this is both a review of the implementation of the chosen option and a lesson at the end of stage 3, the final stage.

7. The time tolerance for stage 2 is +1 week. The options analysis has been delayed and the end of the stage will be delayed by two weeks. The project manager has suggested that the stage end should be delayed by two weeks to ensure the options are fully considered before implementing the chosen option in stage 3

A. Correct. An exception report should include "Consequences of the exception what the implications are if the deviation is not addressed for the project and the business."

In addition, it should include "Recommendation of the available options, which is recommended, and why?"

8. During stage 2, the team manager for the options analysis confirmed that TV advertising would be affordable after all, despite having been worried, earlier in the stage, that it might be too expensive

D. Correct. A check point report should include "Issues and risks an update on issues and risks associated with the work package." Here, this is an update about a risk relating to the affordability of one of the options.

9. A graduate trainee has just been appointed as project manager from stage 3 onwards.

They have suggested that time-driven controls are not needed, because the project is moving into the final stage where the chosen option is implemented.

Is this an appropriate application of the 'progress' practice, and why?

A. Yes, because event-driven controls should be used once the implementation of the chosen option is underway in the final stage

B. Yes, because the project board should make the decision about how to control the work of stage 3, at the end of stage 2

C. No, because the project manager should update the project board on the stage's progress and status at agreed intervals during stage 3

D. No, because the project manager should report to the project board if the stage 3 tolerances are forecast to be exceeded

C. Correct. "Time-driven control: A management control that occurs at predefined periodic intervals. For example, this could be producing highlight reports for the project board." In addition, "monitoring and reporting require a time-based approach whereas control (decision-making) is an event based activity." Therefore, both time- and event-based controls are required during a stage. And as the project manager is less experienced, more frequent reporting may even be appropriate. "The frequency of reporting should reflect the level of control required, and this is likely to vary during the project. For example, if the team is highly experienced, then less frequent reporting may be appropriate. Whereas for an inexperienced team the project manager or project board may wish to increase the frequency of reporting."

10. The project is in stage 1 and the project manager has recorded the following entry in the daily log:

"The Police Liaison Officer has been busy every time I have requested a meeting with them. I need to discuss with the Director of Campaigns why the Police Liaison Officer may be reluctant to engage with me about this project."

Is this an appropriate application of the 'progress' practice, and why?

A. Yes, because this matter should be recorded in the daily log so it can be handled in a discrete manner

B. Yes, because the project manager should actively record and implement lessons throughout the project

C. No, because this is an important issue that should be captured in the issue register for resolution

D. No, because the project manager should produce an issue report to capture and analyse the matter

A. Correct. "The daily log can also be used to record informal issues... The difference between a formal issue and an informal issue is that a formal issue will be captured in the issue register as an open forum... An informal issue is one which... requires handling in a suitable manner where open access would be inappropriate."