Integrated planning and status reporting

Five rules for integrated planning and status reporting, each with a worked example, then the two model sheets. They serve IPMA, PMI and APM exams alike; APM's PMQ asks more for the purpose and contents of the plan than for the arithmetic.

FORMULAS AND KEY RULES

The integration check

every work package → dates, people, money · every risk response → in the schedule and the budget

The parts are often written by different people: check that they agree before the baseline is approved, and whenever one part changes.

`Example: The scope lists 40 work packages, the schedule 38: 40 − 38 = 2 have no dates or people. Fix it before the baseline is signed`

Threshold as a share of the baseline

variance % = (forecast − baseline) ÷ baseline × 100

Inside the threshold, correct the work. Beyond it, escalate with options; only change control moves the baseline.

`Example: Baseline €600,000, threshold 5% = €30,000. Forecast €612,000: 2%, inside. Forecast €636,000: 6%, escalate`

Progress by results, not effort

progress = accepted results ÷ results planned by now

Hours spent and self-estimated percent complete measure effort. Count a result only when it passes its check.

`Example: 70% of the hours are spent, but only 5 of the 8 features planned by now are accepted: 5 ÷ 8 = 62.5% of plan`

Forecast from the pace so far

time for the rest = work left ÷ accepted results per period

Rough, but it rests on results. State the assumption (the pace continues) and check it bottom-up.

`Example: 20 items; 6 accepted in 3 iterations, so 2 per iteration. 20 − 6 = 14 left: 14 ÷ 2 = 7 more iterations`

RAG by threshold (our convention)

green: meets the baseline · amber: misses, recoverable within tolerance · red: breaks the tolerance

Tolerance: the limit delegated to the project manager. Set the thresholds before the first report; red asks for a decision above: send it at once.

`Example: Go-live tolerance 10 working days. Forecast 3 days late, recoverable: amber. Forecast 12 days late: red, and an exception report now`

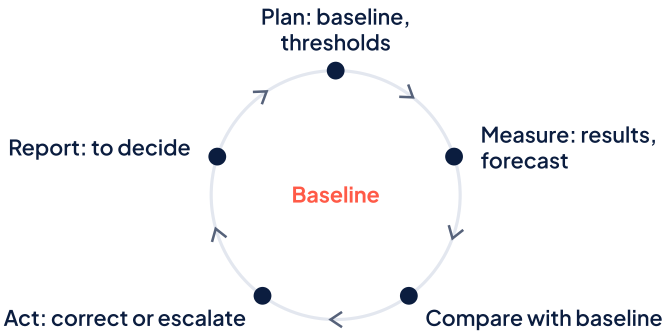
IN THIS HANDOUT

Sources: IPMA ICB4 (2015); PMI, PMBOK® Guide, 8th ed.; PMI, PMP® Examination Content Outline (2026); APM Body of Knowledge, 8th ed.; APM, PMQ handbook (v6, 2026); Simons, Levers of Control (1995); IPMA International Certification Regulations (ICR) v4.4 (2025)

Key: IPMA = International Project Management Association; ICB4 = IPMA's Individual Competence Baseline; PMI = Project Management Institute; PMBOK® Guide = PMI's body-of-knowledge guide; PMP® = PMI's Project Management Professional; APM = Association for Project Management; PMQ = APM's Project Management Qualification; ICR = IPMA's International Certification Regulations.

Control cycle

Compare progress and the forecast with the baseline, then correct the work or change the plan.



Our own cycle, after the basic control loop (element 4.5.10). The centre is what every step refers to.

WHAT IT IS

Our own five steps, after the basic control loop (element 4.5.10). The **baseline** is the approved scope, schedule and cost measured against (APM, the Association for Project Management, adds quality). Agree **thresholds**: inside, correct the work; beyond, escalate and use change control. Diagnostic and interactive control are terms from Robert Simons (1995).

HOW IT WORKS

01 Baseline scope, schedule and cost; agree thresholds.

02 Measure results, not effort; forecast to the end.

03 Inside the thresholds, correct the work; beyond, escalate.

04 Adjust: diagnostic sets targets; interactive asks the team.

MID-LEVEL · WORKED EXAMPLE

Apply it well

The situation: A city team has eight months to move resident parking permits online, with a €600,000 cost baseline and a 5% threshold (€30,000) on the cost forecast.

Month 5: €612,000, €12,000 over; 12,000 ÷ 600,000 = 2%, inside threshold, so corrected. €636,000 (6%) would escalate.

In the exam: Name baselines, thresholds, a deviation and forecast, and whether you corrected or escalated, and why.

SENIOR · WORKED EXAMPLE

Design and lead it

The situation: A city is joining 14 online services under one login over 30 months, with two suppliers. The national login takes changes only once a quarter.

One cycle for every team: a baseline per group, thresholds per level. For quarterly releases, the manager adds **interactive** control: talks on what could go wrong.

In the exam: Show the control system: baselines per stage, thresholds per level, and how it changed with the project.

WHERE IT SITS

IPMA · ICB4	PMI · *PMBOK® GUIDE* 8 · PMP® EXAM	APM · BOK 8 · PMQ EXAM
4.5.10: plan, execute, monitor, adjust; control against the baseline, with a forecast (4.5.10.3)	Guide: Monitor and Control Project Performance, pp. 26–27; baseline, p. 124. Outline: Process task 9	BoK (APM's Body of Knowledge) §5.5.4: a baseline, actual data, what they mean; the deployment baseline, §5.5.3. PMQ (APM's Project Management Qualification) objective 19

Sources: IPMA ICB4 (2015); Simons, Levers of Control (1995); PMI, PMBOK® Guide, 8th ed.; PMI, PMP® Examination Content Outline (2026); APM Body of Knowledge, 8th ed.; APM, PMQ handbook (v6, 2026)

Status report and RAG

Tell each level where the project stands, where it is heading and what to decide, in colours read the same way.

COLOUR	OUR THRESHOLD	WHO ACTS
Green	The forecast meets the baseline	The team, as planned
Amber	It misses; recoverable within tolerance	The project manager
Red	The forecast breaks the tolerance	The steering group or sponsor

Our convention, not a standard: set thresholds before the first report, and give every colour a forecast and trend.

WHAT IT IS

In the ICB4 (IPMA's Individual Competence Baseline), reporting runs both ways: team leads report to the project manager, who reports on to the sponsor and boards, always with a forecast (4.5.10.4). **RAG** (red, amber, green) appears as stoplight charts in PMBOK® Guide (PMI's body-of-knowledge guide) dashboards and as APM (Association for Project Management) BoK (APM's Body of Knowledge) traffic lights, with no fixed meaning. Our convention ties each colour to a **threshold** agreed in advance, so a colour is a request, not a mood. An **exception report** goes up between reports as soon as a forecast breaks a limit.

HOW IT WORKS

01 Agree the structure: what, for whom, how often, what form.

02 Status against the baseline; forecast to the end; the trend.

03 Top risks and issues with owners; decisions needed, with dates.

04 Between reports: an exception report once a limit breaks.

MID-LEVEL · WORKED EXAMPLE

Apply it well

The situation: A city team has eight months to move resident parking permits online. The project manager may absorb a go-live slip of up to 10 working days (the tolerance) and reports every 2 weeks.

One page: status, forecast, trend, top risks, decisions needed. Testing is forecast 3 days late; reordering work can win them back, and 3 is within 10, so the project manager reports **amber** with the recovery plan. A 12-day forecast would be red: an exception report at once.

In the exam: Show a report you made: status against the baseline, the forecast, your colour and its threshold, and the decision you asked for.

SENIOR · WORKED EXAMPLE

Design and lead it

The situation: A city is joining 14 online services under one login over 30 months, with two suppliers, several delivery teams and a steering board; a council committee is briefed quarterly.

Reports roll up from each team and supplier into one page for the board, in one format with the same thresholds. Progress counts accepted results, not hours spent. The committee gets a short briefing. No one is blamed for an amber, so problems surface early.

In the exam: Explain the reporting system you designed: levels, formats, thresholds, exception reports, what counts as progress, and how bad news arrived early.

WHERE IT SITS

IPMA · ICB4	PMI · *PMBOK® GUIDE* 8 · PMP® EXAM	APM · BOK 8 · PMQ EXAM
4.5.10.4: reporting structure, progress and forecast reports, report by exception; information flows: 4.5.5.3	Guide: work performance reports, p. 144; dashboards and stoplight (RAG) charts, p. 190. Outline: Process task 9	BoK §5.5.4: traffic lights, dashboards, trends shown graphically. PMQ (APM's Project Management Qualification) outcome 6b: factors reported on

Sources: IPMA ICB4 (2015); PMI, PMBOK® Guide, 8th ed.; PMI, PMP® Examination Content Outline (2026); APM Body of Knowledge, 8th ed.; APM, PMQ handbook (v6, 2026)