



## White Paper 2015-17

### How to Produce and Update a Convergence Plan

The Convergence Plan is our recommended strategic planning tool. It is also an essential tool for Visual Management in the modern Project Office. In this White Paper we explain some basics for its preparation and update. The essential consideration is the level of discipline which is required when updating it. Because it uses fixed dates and deliverables it can be an extremely powerful tool when used properly.

**Important Note:** Convergence Planning is mainly applicable to Large and Complex Projects and not so much to simple Projects, where it does not necessarily add significant value.

The Convergence Plan is the top most element of our scheduling hierarchy.

#### Convergence Plan Preparation

##### Step 1: Identify the Workstreams, Key Deliverables and Critical Convergence Points of the Project

This exercise is best done initially at the tender/feasibility stage to optimize the execution method. In any case it is important that at the Project kick-off, the Project core team spends time together to identify and discuss those main workstreams and convergence points between workstreams. This will foster an excellent shared understanding of the drivers of the Project. This is best done as a facilitated workshop.

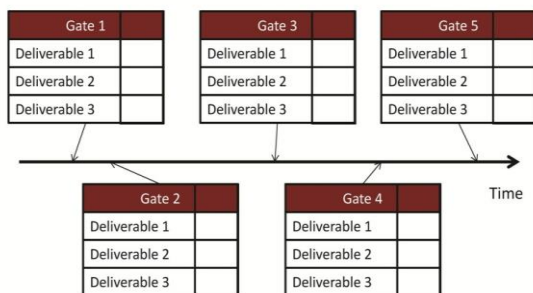
Workstreams are quite common to projects in a particular industry, while critical deliverables will vary greatly from Project to Project. Convergence and key decision points will tend to have some commonalities in an industry, but will change somewhat from Project to Project as well.

At this stage, with a focus on early deliverables / decision points, the team will often identify new issues and decisions that need to be formalized at an early stage.

##### Step 2: Refine the Convergence Gates and Deliverable Dates

Once the key deliverables are identified, their delivery is located on the project timeline and the deliverables are grouped in gates.

Typical Convergence Plan format



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**Contrary to the conventional schedule, the dates for the critical convergence points are set. This requires discipline!**

#### Monitoring and Taking Action on Deviations

Update of the Convergence Plan needs to happen on a monthly basis. A coordinator needs to be nominated in the team (in general, the planner) to retrieve all the data on actual and forecast date of availability

of the gate deliverables. A report on the status of those gates close to the current date is then included in the Project Periodic Report. An updated printout of the Convergence Plan needs also to be posted on the walls of the Project team's premises for internal communication purposes. It is a significant part of what is called 'visual Project management' and is an integral part of any Project war-room arrangement.



#### Responsibilities

The responsibility for delivering the Project (or, the sub-Project) should remain with the Project Manager or the workstream delivery manager. The Convergence Plan should not introduce any doubt in that respect.

For each gate, a responsible person should be identified, the Gate Owner, who is responsible for monitoring and taking action to ensure that the gate is completed on time. Even if all the deliverables in the gate do not fall under his responsibility or budget, the Gate Owner is responsible for monitoring the Gate overall progress and taking action if it becomes obvious that a deliverable might be late. This will generally involve coordinating the work and enhancing communication across several functions. In addition, in most cases, the Gate Owners are the workstreams' Project managers and they have the authority to require project contributors to deliver.

For each deliverable, a person is then appointed to monitor that deliverable. For the sake of clarity, this does not include accountability as to the delivery of that deliverable. Still, this monitoring duty can be challenging because it will involve monitoring across functions and trades, and a heightened and wider duty of attention and diligence.

### **Discipline**

Contrary to the conventional schedule, the dates for the critical convergence points are set. They do not change with the actual progress. They can only change if there is such a significant modification of the execution strategy that it calls for a full rebaselining of the Project schedule

### **Float Monitoring**

The key to convergence planning as an anticipation tool lies in buffer or float monitoring. Monitoring how the float on an activity compared to a fixed point (the convergence point) changes in time gives a great indication of whether the Project is effectively converging. By definition, an activity which float diminishes by one month every month will never happen!

### **Compensating an insufficient conventional schedule**

In those cases where the conventional schedule updating process might be slow or inaccurate, a more relevant and accurate monitoring is expected from the designated person (deliverable or gate owner), who liaises directly with the relevant sources of information. This independent monitoring will allow better quality of actual progress data. The sheer value of implementing that way an accurate monitoring of convergence plan's key deliverables is often considerable in Project organizations that have an inadequate schedule update process.

### **Summary: the Discipline of Convergence Management is the Key**

When you are leading a Complex Project where many different interdependent contributors need to deliver in a coordinated manner, focus on convergence and be disciplined about it. Identify problems early by monitoring your buffers for convergence deliverables. Be relentless in ensuring that temporary additional resources get thrown in early if needed.

The Convergence Plan as a tool gives a high level view of the Project that can be easily communicated to the

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Project team, and allows the Project Manager to focus on those key high value deliverables which timeliness is essential to the success of the Project.

The most difficult part of its effective application is to have the discipline not to change the dates of the Convergence Plan gates once the Project is under

way (unless there is a significant schedule rebaseline due to a change of scope or a major change in a Project milestone).

The Convergence Plan does not replace the Integrated Project Schedule which still needs to be designed, updated and forecast. Data from the Integrated Project Schedule will be used to monitor Convergence Plan deliverables.

Properly applied, the Convergence Plan provides the Project Manager with an uncluttered view of Project progress and enables the function to watch progress relative to the initial intent. It is also an outstanding communication tool within the Project team in terms of visual management.

### **Associated White Papers**

*Convergence Management: the Key to Large, Complex Projects Success* [\[2012-04\]](#)

**Find all these principles of Advanced Scheduling exposed in a comprehensive manner in our Handbook, [Advanced Project Scheduling for Project Managers](#) (2<sup>nd</sup> edition available in [Paperback](#) and [Kindle](#) versions!)**



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