

How2guide: Quality Planning

Introduction	When do you use this guide?
Quality management is about defining what you want and then ensuring it is delivered. At project level it is about the quality and fitness for purpose of the products that are produced. At a programme level it is more focused on the quality of the way it is delivered. Quality management ensures the project or programme are working appropriately and that they remain on target to achieve the business objectives by: • Meeting business expectations • Making sure what is delivered is fit for purpose • Enabling the desired benefits to be achieved subsequently. Quality Management is essential in ensuring the project is not exposed to risks that could weaken or invalidate the business case.	Quality management is part of Management Control. In the early stages it is about developing a clear understanding of what the requirements are and what the success criteria are. During delivery it is about testing and assurance and at the end it is about sign off and handover. Quality management involves key activities and techniques that are central to the management of a successful project. This guide includes explanations of: 1. Quality principles 2. Quality Planning 3. Quality control 4. Quality Review
Quality management principles Planning - quality planning is focused on setting standards of what counts as an acceptable product, including how to meet and achieve these standards. Standards could range from specific industry/organisational standards or be set by the customer, such as software speed or reliability of any other measure considered appropriate. Quality Planning is carried out in the 'define' and 'design' stages of the project and is linked to the product based planning How2guide. Control - quality control involves the processes and activities that take place to monitor whether the products and the work carried out to create the products meet the standards specified. These processes should be defined in the Quality Plan and the results logged in the audits or issue register. It is essential that a project has co-ordinated quality control points so that issues are identified early. Assurance - quality assurance focuses on ensuring that the quality planning, quality control and other processes are working effectively. Quality assurance is carried out independently. Improvement - quality improvement focuses on long term improvements on current practices. In most cases, improvement is outside the scope of individual projects but good project management should improve with experience. It is essential to learn from experience, use lessons learned ('Lessons log') from previous projects and pass lessons on to future projects.	

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Quality planning

This begins with a gathering of the customer's requirements, this is necessary as they can often have only a vague idea of what they want. Therefore it is paramount that the project manager and customer establish a mutual understanding of what will constitute an acceptable product, including requirements. This is at the heart of the 'Define' stage and the documents containing these criteria are refined during 'Design'.



When the requirements are established, the project must devise a strategy for how the expectations, acceptance criteria and description will be achieved in terms of quality control.

Once the requirements and the acceptance quality criteria have been established this is encapsulated into product descriptions.

Each product may be made up of a number of components. Each product will have its own acceptance criteria. The Quality Review will check to ensure these are met. As part of the planning, tolerances are set which outline boundaries of what makes a product acceptable and unacceptable.

Clear statements of responsibility for producing, reviewing and approving products should be included in the project plan.

Quality control

During the delivery phase there must be checks that the development is going according to plan, this can be achieved by testing the product at that point in the development or doing inspections that will provide you with evidence that progress is being made. This could include seeing draft designs, prototypes in operation or seeing drafts of documents or manuals.

The project should be tracking this in either a Quality Register or by using the Issue Management process. Where problems are being identified they should be managed as issues in the Issue Register, if the testing identifies that some elements of functionality cannot be delivered then this will need to be managed by the project board.

The scale of the failure may result in a change of scope of the project. The key concept is that by controlling quality during delivery then problems can be identified early so that there is transparency in the process and there are no nasty surprises in the later stages.

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Technique – Quality Review		
Technique overview		Concept
Quality review is a technique related to quality control. At certain points in the development there will be formalised checks on the status of products. This can be applied to a broad range of products and situations. It is a quality check that is carried out by a person, can involve physical or mechanical testing and sometimes involves statistical analysis of the results. Quality reviews are set up throughout the project to ensure that quality is built into every phase of a products development so that issues are identified before final delivery. The main point of the review is to ensure that problems are identified early and that there is an objective approach and view taken on progress that is being taken.		As part of the project or testing plan, testing milestones should be set so that everyone in the process understands where they are at that time. This helps avoid panic if the product isn't perfect. In this technique the quality review steps are outlined and a simple example used to describe a kitchen being re-decorated. There are five quality control check points scheduled; • When the old Kitchen is stripped out • When the plumbing is installed • When the electrics is installed • When the floor is installed • When the units and tiles are installed The persons involved in this review are the tenant (person who lives in the home), the landlord (the customer) and the kitchen fitter (the supplier).
Activity	Concept	Example
Define the review	There will always be a supplier, a customer and someone to manage the review. There may also be specialists who know about the technical specifics for technical projects	There is a scheduled quality control check once the wooden floor and skirting board have been installed. A quality review of these products will take place once installed to ensure they are fit for purpose and meet the standards and acceptance criteria agreed between the supplier and customer at the early stages of the project.

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Preparation	The key activities in this stage of the quality review include: • Confirmation that the product is ready and reviewers have agreed a meeting date • Access to the product and its product description • Return of the product to the supplier with comments and questions • Planning of the review meeting It is important to note that the review takes place here.	A review meeting is arranged for a date which has been confirmed by the supplier of the products, the customer and the tenant. The supplier has confirmed the products are fitted and ready, so the customer and tenant are set to review the products against its criteria and its product description. The attendees discuss the products against its acceptance criteria and the customer notices that the colour of skirting board is a different shade of blue than agreed.
Review meeting	In this part of the technique, a review meeting takes place to discuss the assessment results. Follow-up actions and responsibilities are agreed here. Hopefully, the only follow-up actions required to complete the product are minor and a further review would be deemed unnecessary. If major changes are needed then it will be necessary to repeat the preparation and review stages, with the quality register being updated accordingly.	The tenant along with the supplier concur that the colour is wrong and this needs to be rectified. The supplier is issued with the change action of painting the skirting board the correct shade of blue. This change is not major but the customer and tenant will check this change before they sign this product off as complete. The actual floor is fine and matches the criteria and is signed off as fit for purpose.
Follow -up	Once minor changes have been made and are signed off by authority, then the review is complete. The quality register and project, stage and team plans will be updated. If problems occur and the result of the review is that the product created is not fit for purpose and has major problems, e.g. the project is being taken outside of its agreed tolerances for stage, then an exception plan process must begin.	The supplier makes the paint changes to the skirting board. The changed product is then presented to the customer and tenant who confirm that the product now meets the product description and is fit for purpose; as a result they sign the product off. This review is now complete and all plans and quality register updated as required. This quality review process will begin again at the next quality control point. In this example, when the units have been installed.