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COURSE BROCHURE

# Advanced Project Controls and Performance Forecasting Training Course

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# Advanced Project Controls and Performance Forecasting Training Course

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Project Controls and Performance Forecasting is a 2-week advanced training course for project controls engineers, planners and project managers who must turn progress data into credible forecasts, with each participant building a project controls playbook for their own project. Capital projects now face tighter funding scrutiny and faster reporting cycles, so sponsors expect early warning rather than late surprises. Jupiter Prime Training designed this course around project controls and performance forecasting as a single, repeatable cycle.

## Why Project Controls and Performance Forecasting Matters Now

Three forces shape controls work today. Sponsors and lenders ask for forecasts they can rely on when releasing funds, not just a record of past spending. Digital progress capture produces more data than teams can interpret without clear rules of credit. And contracts increasingly link payment and incentives to measured performance, so a weak baseline or loose change discipline becomes a commercial exposure. Organisations that control well spot slippage while recovery is still cheap; those that control badly discover overruns at the point when only claims and disputes remain. The course rests on the planned, earned and actual cost relationship and on disciplined baseline and change practice.

## Who Gains Most from Project Controls and Performance Forecasting

- Specialists who build and maintain cost-loaded schedules and baselines
- Engineers responsible for measuring progress and computing performance indices
- Planners who analyse critical path drift and recovery options
- Managers accountable for change approval and forecasts to sponsors
- Cost specialists who track commitments, accruals and contingency

A project or owner's controls team gains most when its planner, cost engineer and project manager attend together and agree one set of rules.

## Project Controls and Performance Forecasting Capabilities

Participants leave able to run every step from baseline to forecast and to defend the numbers before a sponsor.

- Build a cost-loaded performance measurement baseline — the reference every variance is judged against
- Apply objective rules of credit to physical progress — the sponsor's confidence in reported status
- Calculate variances, indices and earned schedule — the choice of which packages need recovery
- Assess change requests for cost and time impact — the approving authority's decision
- Specify estimate at completion assumptions and ranges — funding and contingency release

- Communicate performance in a concise controls report — the steering board's escalation choices

## Key Project Controls and Performance Forecasting Terms

- Performance Measurement Baseline — The approved, time-phased budget for authorised work, used as the fixed reference for measuring cost and schedule performance.
- Control Account — A management point where scope, budget, actual cost and schedule meet under one responsible owner.
- Earned Value — The budgeted cost of work actually completed, measured with agreed rules of credit at a progress cut-off.
- Cost Performance Index — Earned value divided by actual cost; below one means each unit of spend delivers less work than planned.
- Estimate at Completion — The forecast total cost of the project when finished, based on actual cost plus the expected cost of remaining work.
- Earned Schedule — A technique that expresses schedule performance in time units by finding when the current earned value was planned.

## Project Controls and Performance Forecasting Day by Day

### Day 1: Controls in the Wider Delivery Picture

- Project Controls Cycle Map — Where Controls Support Sponsor Decisions
- Owner and Contractor Control Roles — Clarifying Who Reports What
- Control Account Structure — Linking Scope, Cost and Responsibility
- Control Calendar and Reporting Cadence — Timing Decisions to Data
- Controls Maturity Assessment — Choosing Where to Strengthen First

### Day 2: Building the Performance Measurement Baseline

- Work Breakdown Structure Refinement — Defining Measurable Scope Packages
- Cost Loading of Activities — Shaping the Planned Value Curve
- Resource-Loaded Schedule Logic — Testing Baseline Realism
- Management Reserve and Contingency Split — Protecting the Baseline
- Baseline Approval Record — Fixing the Reference for Variance

### Day 3: Measuring Physical Progress

- Weighted Milestone Rules — Crediting Progress Objectively
- Units Completed and Percent Complete Methods — Matching Method to Work Type
- Rules of Credit for Engineering Deliverables — Avoiding Inflated Progress
- Field Quantity Verification — Reconciling Reported and Installed Work
- Progress Cut-Off Discipline — Keeping Periods Comparable

## Day 4: Earned Value Calculations

- Planned, Earned and Actual Cost Triad — Reading Period Performance
- Cost and Schedule Variance — Locating Over-Spend and Slippage
- Cost and Schedule Performance Indices — Comparing Efficiency Across Packages
- Earned Schedule Technique — Expressing Slippage in Time Units
- Variance Thresholds — Deciding Which Deviations Need Explanation

## Day 5: Variance Analysis and Root Causes

- Variance Analysis Report — Explaining Cause, Impact and Response
- Productivity Factor Trending — Separating Rate From Quantity Effects
- Critical Path Drift Review — Linking Float Erosion to Milestones
- Commitment and Accrual Tracking — Closing Gaps in Actual Cost
- Corrective Action Log — Assigning Owners and Recovery Dates

## Day 6: Change Control Discipline

- Change Request Workflow — Routing Scope Changes to the Right Authority
- Trend Register — Spotting Potential Changes Before They Land
- Change Impact Estimate — Pricing Cost and Time Effects Together
- Baseline Revision Rules — Separating Approved Change From Re-Planning
- Change Log Reconciliation — Matching Budget Transfers to Approvals

## Day 7: Forecasting at Completion

- Estimate at Completion Formulas — Choosing the Assumption Behind Forecasts
- Bottom-Up Estimate to Complete — Testing Formula Results Against Reality
- To-Complete Performance Index — Judging Whether Targets Remain Achievable
- Forecast Schedule Completion — Projecting Finish From Earned Schedule
- Forecast Range and Confidence — Presenting Uncertainty to Sponsors

## Day 8: Risk-Adjusted Forecasts

- Quantitative Cost Risk Analysis — Setting Contingency at a Chosen Confidence
- Schedule Risk Simulation — Finding Drivers of Late Completion
- Contingency Drawdown Curve — Tracking Reserve Against Remaining Exposure
- Scenario Forecasts — Comparing Recovery Options for Sponsors
- Forecast Accuracy Review — Learning From Previous Period Predictions

## Day 9: Reporting Performance to Sponsors

- Monthly Controls Report Structure — Giving Sponsors Decision-Ready Information
- Performance Dashboard Indicators — Selecting Few Measures That Matter
- Narrative Variance Commentary — Writing Clear Cause and Action Statements
- Escalation Triggers — Deciding When Issues Reach the Steering Board
- Portfolio Roll-Up of Indices — Comparing Projects on Common Measures

## Day 10: Practising the Project Controls Playbook

- Baseline and Progress Rules Review — Applying Days Two and Three
- Variance and Change Case Run — Applying Days Five and Six
- Forecast Challenge Session — Applying Days Seven and Eight
- Sponsor Briefing Rehearsal — Applying Day Nine Reporting
- Project Controls Playbook — Assembling Rules, Templates and Cadence

## Applying Project Controls and Performance Forecasting After the Course

- Run a rules-of-credit review with the planning and site teams and publish agreed progress methods for each work type
- Produce a first bottom-up estimate at completion for the largest control accounts and compare it with the index-based forecast

## Project Controls and Performance Forecasting Questions FAQ

### What is project controls and performance forecasting and why does it matter now?

It is the discipline of measuring progress against a fixed baseline and projecting final cost and finish. It matters now because sponsors release funds on forecasts, and early, evidence-based warning keeps recovery options open on construction, energy and infrastructure projects.

### Which roles gain most from project controls and performance forecasting training?

Project controls engineers, planners, cost engineers and project managers gain most. You will benefit if you build baselines, measure progress, approve changes or report forecasts to sponsors, whether on owner or contractor teams.

### How does a project controls and performance forecasting course differ from a scheduling course?

It joins cost, progress and schedule into one measurement cycle. A scheduling course centres on network logic and software; this course uses the schedule as one input to variance analysis, change control and completion forecasts that sponsors act on.

### What do you bring back from project controls and performance forecasting training?

You bring back a project controls playbook for your own project. It sets out baseline rules, progress methods, variance thresholds, change steps, forecasting assumptions and the reporting cadence your team will follow from the next cut-off.

## Project Controls and Performance Forecasting: The Way Forward

The project controls playbook first informs which progress rules and variance thresholds the team adopts at the next cut-off. Planners, cost engineers and project managers use it to produce consistent reports and forecasts. After its first reporting cycle, revisit the forecast assumptions: compare predicted and actual results, then tighten the estimate at completion method for the packages that drifted most.