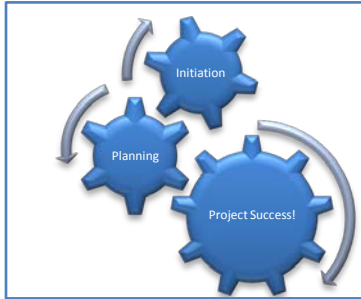




The “Sport” of Project Review

By Tim Boatwright, EVP, PMP, Acumen President

Project Review



There's an expression in sports that says "Winning and losing is decided on the practice field", the

meaning of this is that it is the effort preparing for the game that makes the difference on the playing field during the game. Teams that practice more put themselves in a better position to win than teams that do not.

The equivalent saying in project management would be "success or failure during a project is decided during the initiation and planning phases". Most of us are excited to start a new project and energized by the new challenges that the particular project poses. It is natural in project management, as it is in sports, to want to jump to roll up our sleeves and start working the issues, as it is in sports where we want to "play the game", who plays sports to practice? The problem with this of course, is when we jump right into the game we skip the initiation and planning phases. When you think about why projects fail, most, if not all, drivers of failure can be traced back to something that should have been addressed in the first phases of the project life cycle.

The following table shows why projects fail and identifies attributes that should have been addressed to prevent failure.

Why Projects Fail	Where they should have been addressed
Poor Requirements Definition	Mapping of the requirements to the plan should have been validated before start of execution
Poor Change Control	Clear management process should have been defined before the start of the project
Failure to Set and Manage Expectations	Mutual understanding of scope, assumptions and plans between stakeholders and executioner needs to be established early in the project's execution
Unrealistic Schedules and Budgets	Adherence to project controls best practices

In sports the check of how ready the team is, or how effective the practice has been, is determined with the team plays a scrimmage. The scrimmage is a review of how you plan to execute your game plan, to see how effective your practice has been,

and where, as required, you need to practice more before to game time. In project management this scrimmage is called the project review or Integrated Baseline Review (IBR). Like the sports scrimmage, the project review is intended to review all aspects of how you're going to execute your plan for success and as required, where you need to modify that plan.

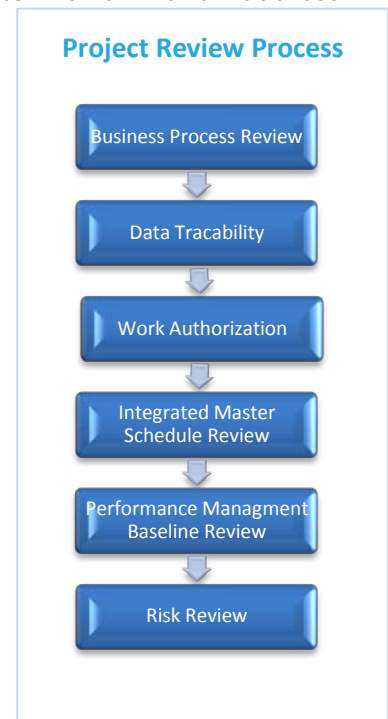
What exactly is an Integrated Baseline Review?

When trying to understand what something is, it is sometimes useful to understand what it is not. This is important for project reviews and IBR's, to understand they are *not* just a business management meeting, in fact, they are more than a meeting, they are processes that culminate in the actual meeting. Too often reviews, if executed at all, are looked at as something for the owner and contractor's business managers to review contractual issues, or in an earned value environment, for the "EV experts" to review ANSI-748A process issues. In fact, the primary goal of the review should be for all parties to come to a **common understanding** on assumptions, plan execution, technical challenges, and to identify risks to the successful completion of the project. Note that the key is to achieving a "common understanding" not "agreement".

There may be items that one party does not fully agree on, for example the approach to solve a technical issue, but it is imperative that all parties achieve a common understanding of the approach, so that there are no future surprises. For example,

there may be multiple ways of designing the wiring to ensure secure communication, the key during the review, is that all parties understand the approach, agree with that approach, understand the risks associated with the approach, and will meet the agreed upon approach requirements. With that understanding in place, a team can avoid surprises and finger pointing when a particular risk does occur while executing the planned approach.

It was mentioned earlier that the project review is a process and not a single meeting, this is important for several reasons. First, it is important to ensure the most productive use of the face to face time at the project review it is vital that all sides come to the meeting fully prepared to discuss issues. A project review meeting should not be a discovery meeting. To effectively accomplish this, data needs to be shared with the team prior to the meeting, and far enough in advance to give the team an opportunity to review and address questions about the data. If the data is not provided ahead of the meeting, time will be wasted during the meeting trying to understand the actual data at it's most basic level, these are issues that can usually be resolved ahead of the project review



meeting. The second aspect of the process is that the post project review action items and follow up be completed. The team should leave the meeting with set expectations and deadlines to complete the action items. It would be rare if there were not action items or issues identified during a project review that would need to be addressed offline.

The Process

Key to a successful review is to conduct it in a structured way which will ensure consistency in findings and results, this is particularly important with large reviews where the actual analysis and interviewing may be broken up across several groups. In the process shown to the right, each step builds on the other as more detail and complexity are added, moving downward through the process.

The first building block is a review of the business processes intended to be used during the management of the project. Establishing a mutual understanding of how the management of the project will be executed builds a foundation of trust between the owner and contractor by establishing mutual expectations of how the project will be managed.

The next level of review is data traceability, which builds upon the established foundation of the previous step, managing the project. The data traceability analysis focuses on making sure different silos of information are linked, through the use of a work breakdown structure, so that any data point, in the chain of data, can be logically traced back to a corresponding data point.

Continuing through the building block processes, the method of work authorization needs to be established. Without a strong work authorization process cost and schedule overruns are likely to occur. The visibility of what work is authorized is key to controlling wasted time and money on efforts that should not have begun in the first place.

Turning to the specific project artifacts, the Integrated Master Schedule (IMS) Review is essential in order to make sure that the schedule is built using sound practices and reflects all of the work required to get the project done. If the IMS has not been built using the industries best practices the ability of it to forecast the impact to decisions made will be undercut. Too often, for the sake of expediency, schedules are built too high a level and represent more of a plan at a single point in time, instead of an execution model that will be able to properly report the true status of the project.

From this the performance management baseline builds is built upon the solid IMS. This is where budget and performance metrics are joined with the plan to round out the plan for your project. The key to this step is in making sure there is integration of the key disciplines; cost, schedule and scope, and that these are properly modeled so that all three sides of the "iron triangle" can be analyzed and managed.

Finally, the ultimate purpose of a project review, performing a risk review. The risks need to be capture, reviewed and analyzed throughout the project review process. Holes identified in the management process

are risks to the project, lack of data traceability is a risk, inadequate work authorization check can make a huge negative impact on the project and so on. While this is represented as the last step, the risks should be captured throughout each step and then finally summed up at the end as risks have to be captured throughout the project review.

Conclusion

The project review is an opportunity to make sure that the project is starting down a path that will lead to accomplishing projects objectives. More than a basic kickoff or business management meeting, the project review should be a structured approach to ensure the proper people, process and tools are in place to manage a project in a proactive, forward looking way with visibility into the risks of the project moving forward. While the review is not a guarantee of success, it does allow a more likely probability of one. Projects, as in sports, are only as successful as the foundation they are built on and by following the solid foundation of the Project review process the project is more apt prepared for success.