Project Review

Module 10

Discussion

QA Process

Signature Selling Method	Customer Relationship Management	WW Quality Assurance Process
Qualify the Opportunity	Opportunity Management	Pre-Bid Consulting
Develop Solution with the Customer	Design the Solution and Create the Proposal	Technical and Delivery Assessment Proposal Baseline Assessment
Close the Sale		Contract Baseline Review
Monitor Implementation and ensure Expectations are met	Deliver the Solution	Project Management Review(s)

Why do Project Management Reviews?

- **Problem Prevention:**
  - **Improve** the quality of projects
    - Detect problems early
    - Help Project Managers develop corrective actions
- **Proactive Troubled Project Remediation:**
  - **Decrease** the number of Troubled Projects
    - Provide sound recommendations and assistance to the PE's / PM's in developing viable recovery plans
    - Follow-up on agreed recovery actions
  - **Assess** and report impact to services business
  - **Identify** root causes and help develop corrective actions
  - **Improve** customer satisfaction
- **Continuous Process Improvement**
  - The PMR goals go beyond identifying & resolving the issues that are impacting a single engagement. The results of each PMR contribute to the improvement of our entire services business portfolio.

What do QA Reviewers Look For?

- Customer relationship: expectations, satisfaction, communications, commitments

- Project management: roles and responsibilities, resources and skills, project management processes, project plans, subcontractor management, problem management and resolution, schedule management

- Change and scope management including Request for Services (RFS) process

- Financial management and status

- Procedures for communication and reporting (internal and external) and their effectiveness

What do QA Reviewers Look For?

- Risk management and current risk assessment

- Delivery execution: transition and transformation management, issue management and escalation, deliverable management

- Technical solution: solution baseline, functional requirements, scope creep

- Level of IBM management support and commitment

How to Prepare for your PMR

- **Be Proactive!**
  - Scheduling the review well beforehand and include the PMR activities in your project schedule
  - Do not try to reschedule it unless you have a *very* good reason, it indicates your project may be out of control
  - Consider it an opportunity to escalate senior management if you need to

- **Do a self assessment using GSRisk and PMR Health prior to the review:**
  - Identify the unique risks and containment strategies
  - Share the results with the QA Reviewer
  - Note that only 1 High Risk finding can down-grade the rating
  - Customer and Financial issues can force a C or D rating

How to Prepare for your PMR

- **Schedule all personnel required for the interviews**
    - Selected IBM personnel (PM, PjTL, Test Mgr etc.)
    - Key subcontractors,
    - Key customer project members
    - Customer PM and Executive sponsor & other stakeholders (do these last)

- **Schedule an hour for interviews and ensure a reasonable break between each interview e.g. 30mins**

- **Make all the arrangements for room bookings etc.**
    - Have a dedicated room with phone & network connection for the duration of the review
    - Make sure rooms are secure and allow confidential discussions.

How to Prepare for your PMR

- **Ensure documentation is up to date and filed in your PCB**

  - Ensure that all required documentation as requested, including the Project Plan, is current and ready for review

  - Send the requested documentation to the reviewer as early as possible

- **Action Prior QA recommendations & actions**

  - Demonstrate that you are implementing the required changes (if any)
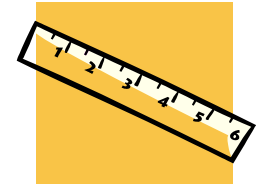
How to Prepare for your PMR

- **Prepare a kick off presentation:**

  – Overview of scope & solution

  – Contract summary : unique T&C's, responsibilities etc.

  – Team composition : IBM, Subcontractors & Customer

  – Governance structure

  – CR/RFS Status

  – Customer Satisfaction/Issues Status

  – Key Issues & Risks and their containment actions

  – Action plan status from previous PMR and unresolved items (if any)

  – Project Status:

    – Financial Position : Earned Value, budget, expenses, profit

    – Schedule : SoW v Work Plan (non-OIS), Transition/BAU (OIS)

    – SLA performance

What Happens after the PMR?

- **Review the findings with the QA Reviewer & correct errors of fact**

- **Develop an action plan with the QA Reviewer**

- **Incorporate your Actions into your overall project plan**

- **Action QA recommendations:**
  - Issues/Findings raised during PMR's need to have appropriate Action plan created and should be tracked and managed to completion.
  - High Impact findings need to resolved before future Program/Project reviews are conducted.

- **Focus on good project management discipline:**
  - Scope, Planning/schedule, Budget/cost
  - Underpinned by Risk, Change, Communications, Quality & Resource Mgt
  - Focus also on what is urgent/important/essential

Case Study Review

Purpose: Practice conducting a project health review

Process:
1. Read the Project Review Document and the Seven Keys Assessment
2. Reviewers – add any additional questions that should be asked
3. Reviewees – collect your project documentation
4. The reviewers interview the PM and project staff to assess the health of each key
5. Create Summary Assessment with Status, Issues and Proposed Actions

Participation: Designated teams act as reviewers, led by Project Manager
Other teams are being reviewed, led by Project Manager

Product: Completed Project Review Document
Flip chart with Status, Issues and Proposed Actions.

Debrief

PM Feedback

After the case study exercise:

- The PM describes what went well

- The team describes what went well

- The PM describes what could have been better

- The team describes what could have been better

- Hand the feedback forms to the PM