

# Project Review

## Module 10



10-1

### Instructor Notes

This module refers to pages 59-60 in the Learning Log.

### Objectives of this Module

- Understand the purpose of a project review
- Understand what reviewers are looking for
- Be able to prepare for a project review
- Experience a project review using the case study

### Module 10 Timing

This module lasts for 1 hour and 15 minutes, 14:00-15:15, on day 3. The agenda is:

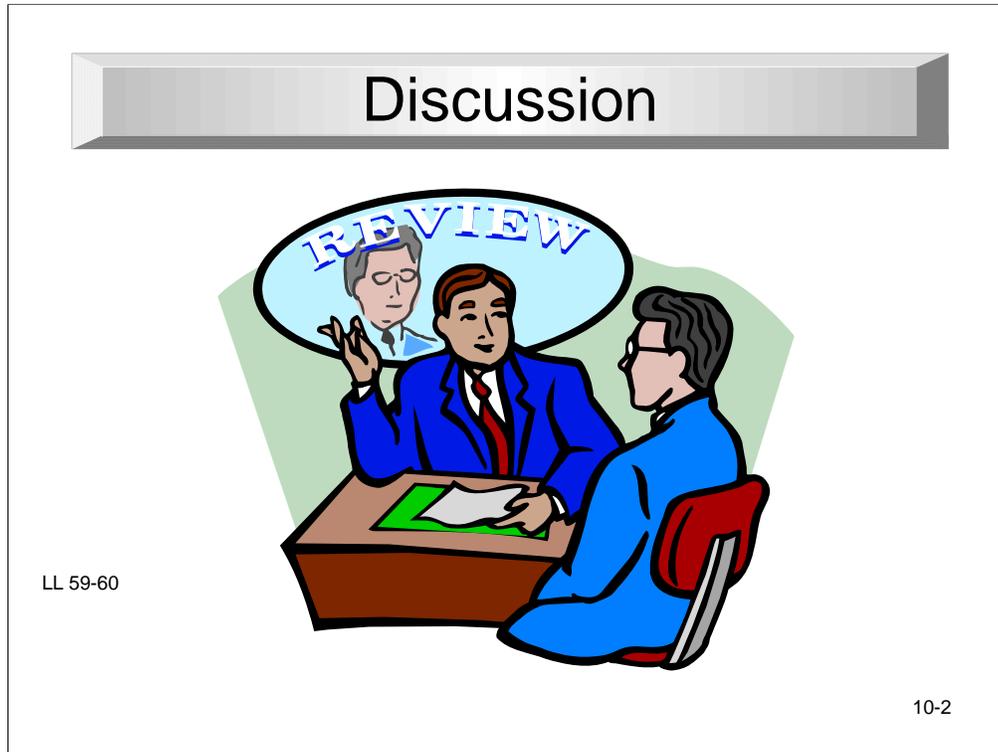
Start	End	Length	Subject
14:00	14:15	15	Discussion
14:15	15:00	45	Project Review Activity
15:00	15:15	15	Debrief and PM Feedback

### Summary of Documents

The Case Study Book contains the following:

Project Review Document

Seven Keys Assessment



**Facilitate a discussion covering topics such as:**

Learning objectives for the module

Answer questions the participants have about the pre-class work

Why should a PM have project reviews?

What experiences has anyone had with project reviews?

What happens on your project when you do perform project reviews?

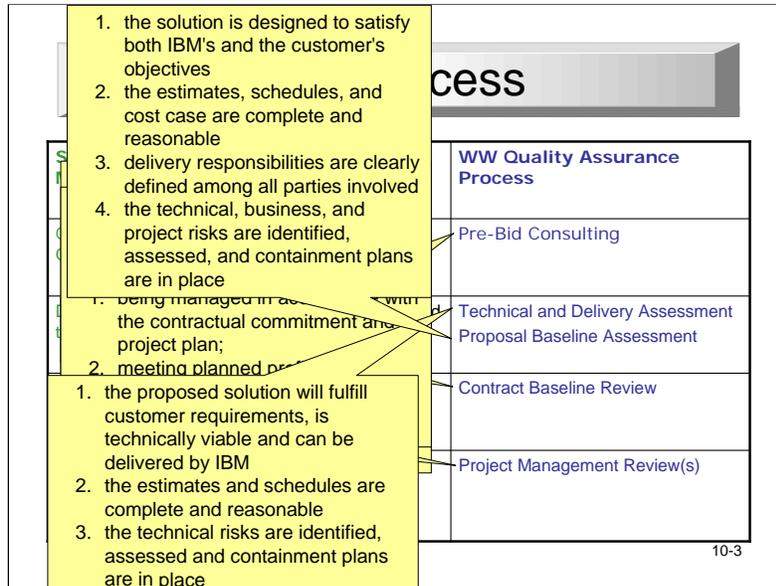
What happens on your project when you do not perform project reviews?

What triggers a project review?

What are the different types of project reviews?

What happens during a project review?

How does the project team prepare for a review?



**Note: This slide builds with each click, adding detail about each of the 5 QA reviews.**

Stress the importance of involving Quality Assurance early and often in the project lifecycle.

**Pre-bid Consulting** Answers the Key Questions: How can we win and is it worth winning?  
Business Benefit: A strengthened win strategy

### Technical and Delivery Assessment

Answers the Key Question: Can we deliver the proposed solution?  
Business Benefit: Mitigation of two primary root causes of a troubled project: inaccurate estimates and infeasible solutions

**Proposal Baseline Assessment** Answers the Key Question: Should we propose the solution?  
Business Benefit: Scalability allows for speed-to-market

**Contract Baseline Review** Answers the Key Question: How well can we deliver the solution?  
Business Benefit: Provides additional information to management and the delivery team about risk and the recommended actions to assist the project team during delivery

### Project Management Review

The initial review is to be performed within 12 weeks from contract start or start of delivery activities. Subsequent reviews will be defined by Quality Assurance based upon the health of the project, business transaction type, and Geography business rules. Maximum time between reviews is 12 months.

Answers the Key Question: How well are we doing against the contract, plans, and customer expectations?  
Business Benefit: Assist the project team in delivering a successful solution and increasing customer loyalty

## 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.

10-4

Talk through the slide

## 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

10-5

## 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

10-6

## 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

10-7

## 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.

10-8

## 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)

10-9

## 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

10-10

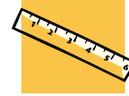
## What Happens after the PMR?

- **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

10-11

## 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.

10-12

### Set-up Activity

The case study book contains the following:

Case Study 10-1: Project Review Document

Case Study 10-2: Seven Keys Assessment

Give the teams 15 minutes to read documents, decide which one they would like to use, think of additional questions and collect project documentation

### Monitor Activity

Give teams 15 minutes to conduct interviews

Give reviewer teams 15 minutes to create their assessment, including the status for each key, issues and proposed actions.

Pay special attention to the information from modules 8 and 9.

Have one of the reviewing teams present their assessment. Ask the other reviewing team if they noted anything different.

## Debrief



10-13

**Debrief the activity by facilitating a discussion covering topics such as:**

What happened during the activity?

What made the activity difficult or easy to do?

What do you need to have before doing this PM process?

Would you be able to do this on your projects?

Would doing this be useful on your projects?

Would creating a Seven Keys assessment help you prepare for a project review?

What should you do with the results of the review?

## 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



10-14

After teams have presented their results, give them a few minutes to provide feedback to the participant playing the PM for the activity.