



# Project Reviews

## Providing Value to Stakeholders

PMI Sacramento Valley Chapter  
Highway 80 Breakfast Roundtable – February 2009  
Bob Cutler, PMP



### What is a Project Review?

- An investigation of project practices, successes, and failures by someone external to the project
- Conducted by
  - Line management
  - Peers
  - PMO
  - Consultant

## Historical Influence

- Reviews have roots in accounting audits
  - Consulting arm of accounting firms
  - Project management not a profession yet
  - No PMBOK® or PMI
  
- Why is that a problem?

## Comparing Process/Objectives

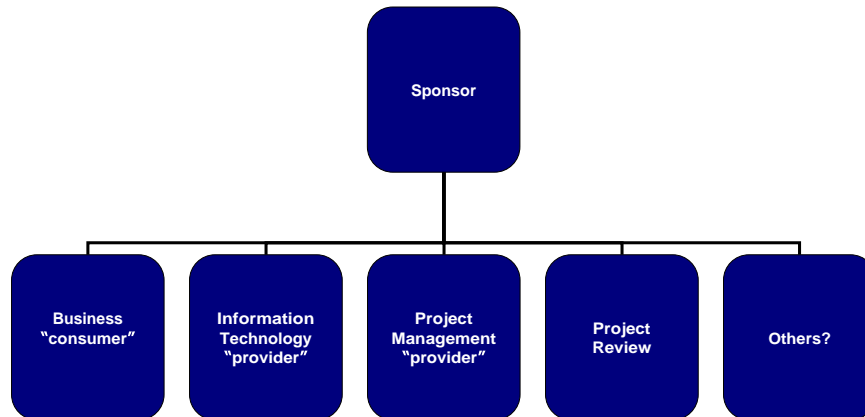
### Audits

- Process focus
- Task completion = success
- Do things right
- Compliance
- Extensive pre-work
- Questionnaire-based

### Reviews

- Product focus
- Whole greater than parts
- Do the right thing
- Success
- Extensive sleuthing
- Interview-based

## Project Participants/Stakeholders



## Stakeholders Want to Know...

- Will the project be a success?
- Define success...

## Success-oriented Project Reviews

- Two to three days at the project
- No forms to fill out (interview-based)
- Preliminary report two days later
- Final report within a week

Here's how it's done...

## Homework First

- Request all pertinent project documents
  - Follow your PM methodology
  - Existing documents only
    - Read between the lines
  - The short list:
    - Project management plan
    - Schedule
    - Current risk & issue logs
    - Status reports for the last three periods

## Set up an Interview Schedule

- Can't be done remotely
  - Best bet: project member or sponsor admin
- Interviewees
  - Project manager (45 minutes) FIRST INTERVIEW
  - Sponsor & Executives (20 minutes each)
  - Project team members (45 minutes each)
  - Knowledgeable end users/consumers
    - Duration depends on degree of involvement
- Schedule meetings on the hour or half hour
- Phone interviews for special situations

## Conduct the Interviews

- Describe your role
- Explain that you will take notes
  - Answers will be paraphrased, not quoted
  - Included comments will be anonymous
- Ask three core questions
  - What's going right?
  - What's going wrong?
  - What keeps you up at night?
- Take notes
  - Write when something important comes up
  - Write when nothing important is said

## Closing the Interview

- Ask if there's anything else on their mind
  - Volunteered information is highly valuable
  - Ask for as much detail as makes sense
- Let them know when you expect to deliver your results
- Thank them for their participation

## Before Leaving

- Brief the sponsor
  - Overview of your impressions
  - Timing on report availability
- Meet with the PM
  - Overview of your impressions
  - Timing on report availability
  - PM will be allowed to correct any factual errors before the report is officially released
  - Offer to be a resource going forward

## Before Writing the Report

- Who is your audience?
  - “Provider” management
  - “Consumer” management
  - Project manager
  - Project team
  - PMO
  
- What do they want to learn?
  - What’s contributing to success?
  - What’s impeding success?

## Report Structure/Content

- Executive summary with graphical overview
- Detailed observations / recommendations
  - On-time performance
  - Forecasting
  - Scope management
  - Customer Satisfaction
  - Other risks and concerns
- Best practices observed
  
- NO HISTORY – this is not a witch hunt!

## Observations/Recommendations

- Apply the 80/20 rule
  - Choose the highest impact recommendations
  - Ask: will it improve the project?
- 3-4 sentences per observation
  - Specific observation (not inferences)
  - Impact on the project
  - Recommended action to remedy the situation

## Success Stories

- Toronto Dominion Bank
  - Confirmed that they weren't fooling themselves
- Sears
  - Informative and therapeutic
- CNRL
  - Worth every penny

## Assess Your Current Process

### Does it measure:

- Compliance
- Processes
- Management

### Or does it evaluate:

- Performance
- Quality
- Leadership

Questions?

## Appendix Slides

- Sample document request list
- Interview candidate list
- Logistics
- Contact information

## Sample Document Request


- Project charter
- Project organization charts
- Most recent review document
- Project plan
- Issue resolution process definition and Issue logs
- Status reports for the last 3 weeks
- Risk management plan and risk log
- Scope statement
- Requirements and specifications
- Scope change control approval process definition
- Configuration management plan and supporting documents
- Organization and project team communication plan
- Organization change management plan

## Interview Candidates

- Project sponsor
- Steering committee members
- Other stakeholder executives
- “Consumer” project manager
- “Provider” project manager
- Technical team lead(s)
- Functional team lead(s)
- End user representative (on or off team)

## Logistics

- Directions and/or maps, including hotel recommendations, site location, travel times, parking, etc.
- Building access / procedure (i.e., security issues)
- Availability of Internet connectivity
- Phone numbers & locations (room and/or building) of interviewees
- Dress code
- Small conference room or vacant office with a door for privacy



## Contact Information

Bob Cutler  
Robert.Cutler @ comcast.net  
916-768-7543