

How Healthy is Your Project?

Wayne Turk

Is your project healthy, or does it have problems? Do you have some niggling doubts that make you wonder if things could be better? Maybe there are latent “germs” just waiting to spring forth and sicken the project. The only way to tell is to have a project “physical.”

The project physical—more properly known as the project management assessment—can help. Oh, it might be called a process review, project review, project audit, or some other title. But it isn't the title that is important, only what is covered and how. It is related to, but not the same as, a CMM (capability maturity model) or CMMI (capability maturity model integration) audit, but they are narrower in scope and look only at whether there are processes in place and whether they are being followed.

What is a PM Assessment?

The term means different things to different people. The title conjures up a picture of someone coming in to grade the project manager—which scares many PMs to death. Sure, that is a minor part of it, but it shouldn't scare anyone. It's just a review of what is being done throughout the project and how. The method could be an online survey, a printed questionnaire, interviews, an internal review, an external review, or some or all of the above. Let's take a brief look at each and then discuss the pros and cons.

The **online survey** and **printed questionnaire** are similar in concept. A standard set of questions is answered by select members of the project staff. It is usually multiple choice but may consist of open-ended or gap-fill

questions. The questions generally cover actions, processes, attitudes, adherence to the schedule, and similar areas. The survey doesn't take long to fill out, but it really isn't that deep.

The **internal review** is carried out by someone (or more than one person) on the current project staff. (Occasionally it might be a borrowed resource, but that is usually considered an external review.) The review consists of an analytic look at all or specified areas of the project. It may include a questionnaire or **interviews**.

The **external review** is normally done by an objective outsider who looks at the management, processes, products, or the whole project.

It may use questionnaires and will certainly include interviews. The external review may be voluntary or directed from outside.

Why Have One?

Well, we can start at the top with the President's Management Agenda for fiscal year 2002. President Bush called for “a bold strategy for improving the management and performance of the federal government. Government likes to begin things—to declare grand new programs and causes. But good beginnings are not the measure of success. What matters in the end is completion. Performance. Results. Not just making promises, but making good on promises.”



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The PM assessment—being results-driven—can help the project meet two of the three guiding principles of the President’s Management Agenda. It helps with the results and performance for a project.

A reality of life for today’s PMs is a tight budget. The operational costs of Iraq and Afghanistan and funding cuts for other reasons (disaster relief and border support, for example) have had a great impact on available dollars. You therefore need to ensure that projects are being run as efficiently and effectively as possible, getting the most out of each buck spent.

Those niggling doubts that were mentioned earlier are another reason for an assessment. While you think things are fine, there may be ways to improve. Project management, to repeat an old cliché, is an art, not a science. No one knows it all, and being caught up in daily crises, the project manager doesn’t always have the time to look at things deeply, thoughtfully, and objectively. Managers certainly want to resolve potential problems before they happen. A little help can’t hurt.

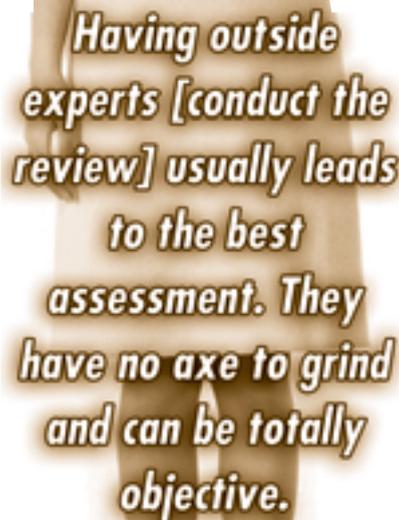
Then there is the case of the project that already has problems. Yes, *all* projects have problems, but we are talking significant problems here. Managers need to resolve them and their underlying causes before it’s too late. They also want to resolve potential problems before they happen, as mentioned earlier. Problems can kill a project (and a career). That is especially true of schedule and budget problems.

Occasionally, the assessment has been directed from above. Upper management may be doing reviews of some or all projects, and yours is one of the lucky ones. They are doing it to identify best practices and problems, look for area to consolidate or share resources, look for redundancies, and identify ways to cut costs. Don’t be insulted, and don’t take it personally. It’s a chance to highlight the good things in the project. Of course, it also identifies areas for improvement. It’s a time to learn.

And finally, the assessment may have been directed by an outside agency. Hopefully the project isn’t in that category. Normally there is no joy in Mudville if Congress, the Government Accountability Office (GAO), or the inspector general (IG) has directed or is doing the assessment. It usually, but not always, means that someone thinks that

there are major problems. Don’t panic, which is the typical reaction. Again, it is a chance to highlight the good things and show that the problems aren’t as great as perceived. Some process, action or methodology, within the project could even end up proclaimed a best practice and touted to the rest of DoD or the whole government.

According to Warren Suss, president of Suss Consulting, a company that performs PM assessments, “A good project management assessment will improve almost any project and can literally save a project that is in trouble. Of course that means implementing the recommendations. If the assessment is just shelfware, the assessment was wasted effort.”



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What is the Best Methodology?

Surveys and questionnaires are a good start to an assessment. Bear in mind that there can be a problem with honesty. It may not be intentional, but people want to put the best light on what they do. It can be the same in an interview, although there is more flexibility with a face-to-face interview. Questionnaires are also limited in what they ask, how much they ask, and the understanding of the recipient. But they can and do identify some problems and potential problems, as well as good processes.

Internal reviews have their good and bad aspects. One of the best is that the reviewer(s) know the program and the people. They frequently know where the bodies are buried. They often have preconceived notions of what is wrong and what changes are needed. That’s good if what they recommend is right, and bad if not. The other real problem is that sometimes they themselves may be a part of the problem or just can’t see it because they are too close to it. Finally, there may also be some fear of retribution if problem areas are identified. All of that said, an internal review is, overall, a good thing.

A review by unbiased outside experts is usually the best idea. It could be voluntary (initiated by the project) or directed. The outside experts could be GAO, IG, contractors, experts from within upper management’s chain, or borrowed resources. Having outside experts usually leads to the best assessment. They have no axe to grind and can be totally objective. They can look at the project with a fresh set of eyes, bringing in experience from other

projects and seeing other (or the same) mistakes. On the bad side, review by the GAO or IG may lead to bad publicity or to someone being fired, but there is no choice if they come in. The final bad points are that the assessment can be relatively expensive when compared to an internal assessment or a survey, and it does impact the work staff to a certain degree for a short period. But the results can be worth it.

When and How?

The when for an assessment is almost any time. When the project is just getting started may not be the best because processes aren't all in place, staffing may not be complete, and the bugs in the project may not all be worked out. Toward the end of the project doesn't work too well either. It's too late. But any time in between is good. Once staffing is complete, processes are in place, and everything is moving forward, consider having an assessment done. That way, bad processes are not too ingrained, problems are still in their infancy, and there is time to fix any discovered issues.

What should the assessors look at? The more comprehensive the review, the better it is for the project. That way everything has been looked at and analyzed. What follows is a list of suggested areas for review. As you can see, they cover the full spectrum.

- Requirements
- Documentation
- Budget
- Other resources
- Configuration management
- Overall management
- Communication
- Testing
- Training
- Conflict and conflict management
- Any others specific to the project.
- Planning
- Schedule
- Staff
- Risk management
- Processes
- Metrics
- Security
- Deployment
- Contracting Technology

Sometimes, for financial, time, resources, or other reasons, the assessors may look only at selected areas. While that is not optimum, it is a start and can be very helpful. That is especially true if certain areas have already been identified as having problems or needing improvements. Sometimes, you have to take what you can get.



Honesty and a complete reporting of problems are necessary, so don't get defensive. Accept the findings with an open mind.

The Outcome

When all is said and done, the assessors have peeked into all of the project's nooks and crannies, and they have had a chance to analyze the findings. The results should come back as a report, briefing, or both. Honesty and a complete reporting of problems are necessary, so don't get defensive. Accept the findings with an open mind. Some recommendations may not be possible to implement or may have to wait until a later date. Review and implement the recommendations as soon as possible.

Areas in the report should cover at least the following:

- What was reviewed/analyzed
- Who was interviewed (not necessarily by name)
- Examples of any questionnaires or surveys
- What documents were reviewed
- Identification of best practices and things done well
- Identification of good processes in place
- Identification of processes that need changing
- Problems existing now
- Potential problem areas
- Improvements or changes that should/could be made
- Recommendations for improvements/changes.

The final and most important outcome—implementation of changes to improve the project. Identifying those is what the assessment is for. Use it and reap the benefits.

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