



Project Health Check

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Overview

This is the second article in a series about managing a project in crisis. It covers how to carry out a project health check to establish exactly what is happening in a project that may be in difficulty. It also provides a useful checklist of what to look for in a normal project health check or project review.

Structure

The last thing you want to do in a health check is to wander in and just start poking around in a random fashion. It is the equivalent of strolling into a car yard to buy a car. If you just give it a prod and a poke, perhaps look under the bonnet, you will probably have no real idea of whether it is a good deal. If however you have a professional check it out in an orderly manner – suspension, brakes, engine, gearbox, upholstery, paintwork etc. – you will more likely identify any faults to be rectified.

In order to carry out an assessment of a project status, you need to have some sort of structure to work within. PMBOK (Project Management Body of Knowledge) provides a good framework. There are some other aspects to consider but the following checklist will provide a good core of questions to ask, and areas to probe in order to look at what needs to be rectified.

The questions below are grouped into logical areas of investigation. Any organisation will have specific questions to ask, and these can be added to the list below.

Scope

- Was the scope well defined at the start of the project?
- Is there a scope variation process in place?
- Are there variations that have not been subject to that process?
- Can the team identify the cumulative impact in time and cost of the variations?
- Are actuals tracked against estimated impacts for variations?
- Has the project plan been adjusted to cater for variations?

Cost

- Is there a cost tracking system in place?
- Are costs being tracked?
- Are any costs not being tracked properly?
- Is the cost tracking up to date?
- Are costs being reconciled against corporate accounts?
- Are cost projections in place for the completion of the project?
- Have any variances been approved in writing?

Time

- Is a suitably detailed schedule in place?
- Is it up to date?
- Does it reflect the current scope?
- Are milestones being used to manage progress?
- Are there regular enough milestones to track progress or are there weeks of the project that have no milestones?
- Is time being monitored through a time sheeting system?
- Is there a solid and realistic plan for the remaining work?

Quality

- Is there a quality plan in place?
- Are deliverables subject to a quality plan?
- What actions happen after a quality review, and are they monitored?
- Does the plan have time allocated for rework after quality review?
- Is the test plan realistic (test strategy, test plan and test cases in place)?
- Are the appropriate people allocated to testing?
- Is testing inclusive of system, performance and interface testing?

Resources

- Are there sufficient resources?
- Are they the right resources?
- Are they able to allocate sufficient time to the project?
- Is there a sense of cooperation within the project?
- Are the team being well managed?
- Are the resources being used efficiently?
- What is morale like in the team?

Communication

- Is there a communications plan in place?
- Is it being implemented?
- Have all key stakeholders been identified?
- Do the stakeholders feel they are being kept up to date?
- Are there any general areas of concern in communication?
- Is the project likely to deliver corporate change and is there a plan to manage expectations?
- Is that plan being implemented and expectations monitored?

Procurement

- Are external resources being used?
- Are up to date contracts in place to manage those resources through to the end of the project?
- Is there a contingency to retain those resources beyond the scheduled end of the project if required?
- Does the project involve purchase of plant and equipment or software, and if so is there a plan in place for contract negotiation?
- Are the authorities and timeframes for contract negotiation understood and built into the plan?

Risks

- Is there an up to date risk plan in place?
- Have key stakeholders been involved in developing the plan?
- Are there mitigation strategies in place, and are they being monitored?
- Are regular risk reviews undertaken?
- Is there an issues log?
- Are issues managed to resolution?
- Is there an issue escalation process in place? Does it work?

Contingency Planning

- Is there a contingency plan in place if the implementation fails to meet the deadline?
- Has the plan been signed off by all concerned?
- Has the plan been tested?
- Are the impacts of a contingency plan understood by management?
- What is the timeframe to implement the plan?
- How long can the contingency arrangements last? What will happen then?

Benefits

- Were benefits identified at the start of the project?
- Have they been reviewed recently?
- Are they still relevant?
- Have new benefits been identified and are they built into the project outcome?
- Are the benefits being, or will they be, measured?
- Have benefit delivery owners been identified?

Business Process

- Will there be an impact on business processes?
- Are they being planned for by the business?
- How and when will they be implemented?
- Do we know they will work?
- What impacts are likely to occur outside the company?
- Are they being planned for?

Training

- Is there a training plan in place?
- Is there time to produce training materials?
- Are the trainers identified?
- Will staff be available for training?
- Is there a plan to pilot the training?

Implementation

- Is there an implementation plan in place (assuming the project is well progressed)?
- What support will be provided during and after launch?
- Who will authorise 'go live'?
- Are there criteria for 'go live'?
- If the implementation involves data conversion, is the state of the data known?
- Will the data require manipulation, and has this been tested?

Governance

- Are there checkpoints for review by a management group to determine if the project is meeting organisational standards? Obviously a health check is one such process but typically a project should have some gates to pass through where certain criteria will need to be met.
- Do the project team have the necessary tools, skills and processes to undertake the project successfully?
- Who is monitoring compliance?
- If the company has a methodology, is it being adhered to?

Roles and Responsibilities

- Are roles and responsibilities clearly defined?
- Are they an accurate reflection of what is really happening?
- Is the business providing the necessary level of support?
- Is there sufficient executive support for the project?
- Are any responsibilities not covered in the definition of the R&R?

Documentation

- Are documents held in a central project location?
- Is the location well organised to enable documents to be easily located?
- Is proper version control in place?
- Are the major documents generally well constructed?
- Are agendas and minutes kept of key meetings?
- Are proper signed authorities in place for key decisions?
- Is there a project glossary?
- Is there a decision register?

Requirements

- Are requirements well documented?
- Is there a tracking system for requirements and changes to requirements?
- Do the deliverables reflect the requirements documents or did they morph during development?
- Are reasons for changes to requirements documented along with who approved the change?

Summary

There are probably other specific areas to review in each organisation, and even within particular projects in the same organisation. The list above will probably be a 70% to 80% fit for most situations. If you do have any other specifics you would like to add, please email them to the address below. We are happy to upgrade the white paper to add your contribution.

We started out about a month ago to write one white paper on rescuing a project in crisis. The first section which relates to preparing for a review and rescue (http://www.projectperfect.com.au/info_project_in_crisis_1.php) became so extensive, we decided to split the white paper into two parts. When we got into the 'review' part we found it was enough information to stand alone. The third and hopefully final part will cover the actual rescue operation.

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Project Perfect is a project management software consulting and training organisation based in Sydney Australia. Their focus is to provide creative yet pragmatic solutions to Project Management issues.

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