Introduction to the Project Deep Dive Review

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The Deep Dive Review

• Project Deep Dive Review
  – A broad & deep review of the project management elements of a project

• A discipline of regular involvement by executives in evaluating a project’s operation and progress
  – Broad coverage of topics: goes well beyond schedule management
  – Deep coverage: examination of measured performance

• Improves Project Management execution
  – Reinforces expectations
  – Accountability mechanism for Project Managers – professional discharge of responsibilities

• Important element of a quality management system
  – Complements monthly project status updates and weekly exception reporting

• Administered by the PMO on behalf of the executive
Review Meeting Objectives, Outcomes

• Deep Dive Review - Meeting Objectives
  – To ensure that the PMO and Executive Management are sufficiently aware of project essentials
  – To ensure that the project management activities are adequate for project success

• Typical Outcomes of a Review
  – Identification of shortcomings in the Project Management activities
  – Requests of PM actions to take
  – Affirmation that the project is proceeding well
  – Significant correction in the project’s direction
  – Actions assigned to the PMO or project executive
Deep Dive - Coverage of Knowledge Areas

- Integration Management
- Scope Management
- Time Management
- Cost Management
- Quality Management
- Risk Management
- Procurement Management
• Introduction

• Project Value

• Project Commitments and Deliverables
  • Project Plan

• Project Status

• Recap & Meeting Close
Project Review - Agenda

• Introduction
  – Review of Review Meeting Objectives, Format
  – Introduction by each Attendee (role in this meeting)
• Project Value
  – Business Driver
  – Business Measures of Success
  – Project Measures of Success
• Project Commitments and Deliverables
• Project Plan
  – Schedule
  – Project Budget
  – Project Resource Profile
  – Deliverable Quality
  – Supplier Performance Management
  – Technology/Innovation Plan
• Project Status
  – Current Status: Commitments, Schedule, Budget, Resources
  – Current Status: Deliverable Quality, Supplier Performance
  – Project Risk Register
  – Project Issues/Action Item Register
• Recap & Meeting Close
  – Project Manager’s Prognosis for Project Success
  – Agreement that Review Objectives Have Been Met
A Family of Project Reviews

The series of project reviews includes:

• Project Management Reviews

• Team Reviews

• Process Reviews

• Technology Reviews
A Family of Project Reviews

The series of project reviews includes:

- **Project Management Reviews**
  - **Project Discovery Review**
    - An initial introduction to the project's history, plans and performance
  - **Project Deep Dive Review**
    - A broad & deep review of the project management elements
  - **Project Finance Review**
    - Detailed review of budget, spending, invoicing, funds transfer

- **Team Reviews**
  - **Project Inter-Team Partnering Review**
    - Examination of inter-organizational 'contracts' & process, and the success in partnering
  - **Project Supplier Performance Management Review**
    - Overview of SPM methods used & details of supplier performance results

- **Process Reviews**
  - **Project Process Quality Review**
    - A review of the quality management methods used for this project

- **Technology Reviews**
  - **Project Technical Briefing**
    - Presentation of the technology of the project: architecture, innovation plan, designs
  - **Project Configuration Management Review**
    - Examination of the configuration management practices, tools, audits and reports
• Participants
  – Project Manager and their 1st line manager
  – Project executive
  – PMO Manager
  – PMO commitment, budget, resource and quality management leads

• Format
  – Presentation by Project Manager, using a fixed agenda
  – Discussion, as needed, on each slide

• Frequency
  – Twice a year for each project

• Time Investment
  – Preparation
    • Typically 5 to 10 hours for the first review
  – Duration
    • Typically 3 hours per review for the first year
These materials enable effective implementation of Deep Dive Reviews

• **Introduction to Deep Dive Reviews**
  – This overview provides a high level description of Deep Dive Reviews that is useful in briefing executives, managers and the PMO on the highlights of Deep Dive Reviews.

• **Training on the Presentation Template**
  – This 40 minute training course on Deep Dive Reviews instructs the Project Manager on preparation of the presentation materials, and helps the project executive/manager and the PMO understand the topics that should be presented and discussed during a Deep Dive Review meeting.

• **The Deep Dive Review Process**
  – This process description for the Deep Dive Review can jump-start your implementation of Deep Dive Reviews, and provides further details on the steps to follow.

• **Presentation Template**
  – This MS-Project presentation template provides all of the slides to be populated by the Project Manager and presented at the Deep Dive Review meeting - extensive notes for most slides provide a reminder of the instructions provided during the training course on Deep Dive Reviews.
1. Agree that the approach is appropriate
   - Consistent with the management approach within the organization
   - The skills of management and the PMO are as required for effective participation in the reviews

2. Train
   - Enable Project Managers, managers and the PMO

3. Establish the review schedule
   - Minimum 3 weeks notice, these should be scheduled on a regular cycle covering the next 6 to 12 months.

4. Training refresher for staff and management after the first set of reviews
   - Reinforce key points & modifications based upon experience with the reviews within the organization