Training on Use of the Template for the Deep Dive Review

Training for Project Managers, PMO Members and Executives with Project Responsibility

Bill Hoberecht
Pinnacle Performance
Training Outline

- Step through each slide of the template presentation
  - Have the PowerPoint version of the template available for making annotations

- Explanation/training information is in Yellow Text
  - Text in White is for your actual presentation slides

- The remainder of this training session will look at each slide of the template presentation
  - 29 slides for the presentation
  - In addition, a few informational slides that you will discard and not include in your final presentation materials (like this slide, the title and text on those slides will be in a Yellow font)
Project Name

(select one of these following titles - delete the other two)

Project Highlights Review or
Project Update Review or
Project Deep Dive Review

Project Manager Name
Date of Presentation
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
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
• **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
- Project Manager action items
- Affirmation that the project is proceeding well
- Significant correction in the project’s direction
- Actions assigned to the PMO or project executive

**Meeting Format**
- Presentation by PM to Project Executive and the PMO
Business Drivers

- Showing alignment between the Business and the project
  - CIO Magazine regularly reports that this is a key failing of IT organizations

- Is this project aligned in support of the business?
  - What is important to the business?
  - What does the business want to accomplish?

- Some Hypothetical Examples
  - Grow market share
  - Retain all existing customers
  - Enter a new market with a new product
  - Increase profit margin by decreasing operating costs
Business Measures of Success

• Measuring how well the Business Drivers are satisfied
  – This information might be in a Business Case
  – Organizational performance measures
  – Show the specific measures that the business is using to measure their success

• This is important Information for Your Project
  – Tells you specifically how the business is measuring their success
  – Tells you how to focus the project to assist the business

• Some Hypothetical Examples
  – % Of Market Share
  – Number of customers
  – Count of new product introductions in a rolling 12 month window
  – % budget allocated to ongoing operational costs
• **Key Questions for Your Project**
  – What are we measuring so that we know if this project has been successful?
  – If we are successful, have we enabled/assisted the business in achieving their success measures?
    • Draw a clear relationship between the success of your project and the success of the business

• **Some Possible Areas to Measure Project Success**
  – Delivery
    • Schedule
    • Cost vs. Budget
    • Delivering all committed features (e.g., scope)
    • Achieving quality measures
  – Process Maturity
    • CMMI Maturity Level, ISO Certification, OPM3
    • Compliance with PMO Processes
  – Innovation
    • Number of patent applications filed
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
Your Project Commitments

• Should be more specific than Measures of Success
  – Show specific budget, schedule and feature list
  – Should be directly copied from your commitment statement
  – Show where the version-controlled version of commitments resides

Consider Including Other Information

• Clearly describe how ‘finished’ the deliverable is
  – E.g., Is your project delivering a final product that is ready to ship, or are you delivering into a later phase of testing?
  – If your organization uses ‘gates’ then specify what gate has been exiting when this project completes its deliverable

• If the receiving organization or team is not obvious, then specify the receiving organization.
  – Your project should have agreed acceptance criteria documented
Information to present in Project Plan Slides

• Is this project plan viable?
• Does this Project Plan satisfy the project commitments?

Your Project Schedule

• Show 6-10 key milestones for your project
  – Showing over 10 milestones could confuse the audience
  – Focus on high level, important milestones – not the detailed tasks

• If your project uses gates, then show the relevant gates

• Your focus is the schedule; your materials and discussion should cover these points:
  – Does this schedule satisfy the commitment?
  – Does this schedule meet customer needs?
  – Is this schedule reasonable & viable?
  – (This is not a status slide – status will be presented later)
Your Project Budget

• Show the authorized budget

• Show your budget plan for your project
  – This is your plan for spending on this project
  – Show the budget plan per month
  – If spending categories are relevant for your organization, show planned spending by categories
    • E.g., internal labor, external labor, technology purchases, travel

• Your focus is the budget plan; your materials and discussion should cover these points:
  – Is this budget sufficient?
  – Can your project actually spend this much?
  – Is your spending plan within the authorized budget?
  – (This is not a status slide – status will be presented later)
Your Project Resource Profile

- For most reviews, this is about People on the project
  - If you have other critical resources (e.g., test labs), then you’ll show that information here as well.
  - Exclude people employed by your suppliers
    • This will be covered under ‘Supplier Performance Management’

- This is your plan for rolling people on and off the project
  - Show the resource plan per month
    • Confirm that plans are within authorized headcount

- Your focus is the resource plan; your materials and discussion should cover these points:
  - Is the plan viable?
    • If you are increasing staffing levels, is that staff truly available?
  - How are you ensuring adequate skills within the project team?
  - (Remember, this is not a status slide – status will be presented later in this set of presentation materials)
Partnering With Other Organizations

• Identify the organizations with whom you partner
  – How are partnering agreements finalized & documented?
  – What are the key interdependencies between your team and each partnering organization?

• Your focus is the partnering plan; your materials and discussion should cover these points:
  – Have you identified all partnering organizations necessary for project success?
  – Identify the key risks introduced by having these specific partnering organizations.
  – (Remember, this is not a status slide – status will be presented later in this set of presentation materials)
The Quality of the Project Deliverables

- List the quality metrics for your project
  - These are the items that will be measured, prior to project completion, so you know the quality of the project deliverables.
    - E.g., outstanding Severity 1 defects, defect density, inspection results
  - Show the target values to be achieved

- Your focus is the quality plan; your materials and discussion should cover these points:
  - Is your set of quality metrics sufficiently complete?
  - If the quality targets are achieved, do the final deliverables have sufficient quality?
  - Is it possible and reasonable to collect & analyze these measures?
  - (Remember, this is not a status slide – status will be presented later in this set of presentation materials)
Performance of the Project’s Suppliers

• Your Suppliers
  – Technology Solutions Suppliers & Professional Services Suppliers
  – Identify your suppliers and what they are providing to the project
  – Describe the key points of visibility you have on supplier performance
    • E.g., staffing levels, measures of deliverable quality, schedule tracking, process compliance

• Your focus is the supplier performance management plan; your materials and discussion should cover these points:
  – Are the supplier’s deliverables unambiguously defined and described in published documentation?
  – Does this plan provide adequate controls on supplier performance?
  – Does the plan include formal acceptance of deliverables?
  – (This is not a status slide – status will be presented later)
Innovations

• Describe the Advances Introduced by this Project
  – Identify any new technologies/inventions that this project is creating
    • Show how these inventions are protected
  – Identify any new technologies/inventions that this project is using
    • Show how the team is equipped to use these technologies

• Your focus is the innovation plan; your materials and discussion should cover these points:
  – Are the innovations appropriate for this project?
  – How are the risks of innovations being addressed?
  – (Remember, this is not a status slide – status will be presented later in this set of presentation materials)
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
Status Relative to your Plan

- **Commitment Performance**
  - Refer to the Commitments shown in an earlier slide
  - Are you still on track for satisfying each of these commitments?

- **Your focus is the commitment status; your materials and discussion should cover these points:**
  - Are the commitments baselined and under change control?
  - Is the commitments list kept current as an accurate reflection of the expected delivery?
  - Any deviations from the commitments should have annotations and additional explanation.
Status Relative to your Plan

• **Schedule Performance**
  – Refer to the Schedule Plan shown in an earlier slide
  – Has the project achieved past milestones?
  – Are you still on track for accomplishing future scheduled milestones?

• Your focus is the schedule status; your materials and discussion should cover these points:
  – If you utilize a Schedule Performance Index (SPI), then show that information
  – Identify corrective actions taken for
    • Past milestones in which the scheduled date has been missed, or
    • Future milestones that are expected to be missed
Status Relative to your Plan

• **Budget Performance**
  - Refer to the Budget Plan shown in an earlier slide
  - How close is the project’s spending (to date) to the budget plan?
  - What is your projected spending at project completion?
    • How does this compare with the budget plan?

• **Your focus is the Budget status; your materials and discussion should cover these points:**
  - If you utilize a Cost Performance Index (CPI), then show that information
  - Any deviations from the budget plan should have annotations and additional explanation.
Status Relative to your Plan

• Project Resources - Status
  – Refer to the Resource Plan shown in an earlier slide
  – How close are the project’s resource level (to date) been to the resource plan?
  – What is your anticipated ability, in future weeks/months, to achieve the levels stated in the resource plan?

• Your focus is the Resource status; your materials and discussion should cover these points:
  – Any deviations from the resource plan should have annotations and additional explanation.
Status Relative to your Plan

• Partnering Organizations
  – Refer to the Partnering Plan shown in an earlier slide
  – Are the necessary mutual commitments and agreements in place?
  – Is the project team fulfilling their responsibilities?
  – Are the partnering organizations satisfying their agreements?

• Your focus is the Partnering status; your materials and discussion should cover these points:
  – You should note instances where the agreements are ad hoc, and explain any risk that this might introduce to the project.
  – Any deviations from the partnering plan should have annotations and additional explanation.
Status Relative to your Plan

• **Quality Performance**
  - Refer to the Deliverable Quality Plan shown in an earlier slide
  - Show the project’s measured quality

• **Your focus is the Quality status; your materials and discussion should cover these points:**
  - Present corrective actions if:
    • You are not collecting quality measures, or
    • You are not analyzing the quality measures
  - Any deviations from the Quality plan and expected quality measures must have annotations along with additional analysis & explanation.
Status Relative to your Plan

- **Supplier Performance Management**
  - Refer to the Supplier Performance Management Plan shown in an earlier slide
  - Show the performance measures thus far on the project

- **Your focus is Supplier Performance status; your materials and discussion should cover these points:**
  - Describe any deviations from the required supplier performance
    - Include planned improvement actions
  - Present corrective actions if:
    - You are not collecting Supplier Performance Management measures,
    - You are not analyzing the Supplier Performance Management measures, or
    - You are not taking action where indicated by the measures
The Project Risk Register

• Risk Highlights
  – Show the most significant items in your risk register
    • Typically those with highest likelihood and highest impact
  – Limit yourself to only 3 to 5 items

• Your materials and discussion should cover these points:
  – For each risk, show the risk management information
    • Risk cause
    • Risk event
    • Risk impact
    • Risk response
The Project Issues/Action Item Register

• **Key Items only**
  - Show the most significant items in your register
    • Typically those that are
      - highest impacting
      - most difficult to address
  - Limit yourself to only 3 to 5 items

• **Your materials and discussion should cover these points:**
  - For each project issue, show the issue details
    • Owner
    • Due Date
    • Description
    • Impact
Project Escalations

- **Actions Previously Escalated to Management**
  - Show all escalations that are still open (e.g., action is still required)

- **Your materials and discussion should cover these points:**
  - For each escalation, show:
    - **Description**: Description of the problem
    - **Action**: A prescribed action, if this is known. This is the action expected to be taken by a specific manager/executive
    - **Owner**: The name of the manager/executive who was requested to take action
    - **Due Date**: The due date for completion of the action
    - **Impact**: An statement of impact that describes the impact on a project milestone if the action is not completed by the due date
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
Project Manager View

- Preceding slides presented a plethora of project value, project plan and project status information.

- Candid view of project’s ability to succeed
  - Might build on the sum total of all that has been presented
  - Using insights, might choose to focus on a small number of items
Has this review satisfied its objectives?

On this slide:

• Copy the Objectives shown earlier in your presentation
  – Everyone can agree that the objectives have been met
  – Note changes/updates for the next review

• This is the final discussion item for the review meeting
Notes on action items:

- The Project Manager should ensure that key discussion items are recorded:
  - Significant comments
  - Advice on project manager actions
  - Actions that the Project Manager must complete
  - Improvements in the information prepared by the Project Manager for subsequent Deep Dive Review meetings
This concludes the session on:

*Training on Use of the Template for the Deep Dive Review*