Project Technical Briefing - Process Overview
The Method for Conducting Project Technical Briefings

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Process Overview - Agenda

- The Process Steps for a Project Technical Review
  - High Level Process
  - The details for each of the 3 sub-processes

- Technical Lead – Learning about Technical Reviews
  - Steps a Technical Lead should take to learn about and be adequately prepared for this type of review

- Supporting Information
  - The available reference and training of materials on these reviews
1. Overall Planning of Reviews (Slide 4)
   - Understanding technical risks for projects in the portfolio
   - Select projects that should conduct a Project Technical Review

2. Preparing for a Review (Slide 5)
   - Identify attendees
   - Training for the Technical Lead on the process
   - Prepare and distribute the review materials

3. Conducting the Review (Slide 6)
   - Presentation of the review materials, along with discussion
   - Record needed actions
   - Publish meeting results
1. **Identify the Universe of Projects**
   - List all projects that are within the Program.

2. **Finalize Selection Criteria**
   - Document the selection criteria used in selecting which projects will conduct a technical review. Criteria elements should include:
     - **Project Risk.** The overall qualitative risk assessment of the project (e.g., the risk to a project’s success, measured as High, Medium or Low).
     - **Importance to the Company.** The overall value of this project to the company; this will likely be a qualitative assessment.

3. **Finalize Selection of Projects**
   - Select the projects to participate in Project Technical Reviews during the coming three/six months.
   - Inform each Project Manager & Technical Lead of their project’s participation in the Project Technical Review.
     - Each Technical Lead will schedule their Project Technical Review
1. **Establish the Review Meeting Attendee List**
   - The Project Manager and Technical Lead identify attendees

2. **Training for the Project Technical Lead**
   - Ensure that the Project Technical Lead (who will be preparing & presenting) is trained in the process & presentation template.

3. **Publish the Review Schedule & Distribute Materials**
   - Early notification to project teams and other participants can help ensure proper attendance and preparation.
     - Propose the review meeting on the project’s standard calendaring system

4. **Assemble Current Project Technical Information**
   - Software Engineering Processes
   - Architecture and Design artifacts
   - Technical quality metrics and measures

5. **Prepare the Deep Dive Review PowerPoint presentation**
   - The Technical Lead creates the review presentation.
   - Resolve controversial issues or a lack of clarity prior to completing this step.

6. **Distribute the Presentation Materials**
   - Provide the completed Project Technical Review presentation to all attendees
   - Also publish the materials to others who are not attending but should have an opportunity to review and provide feedback
1. **Introduce the Review Meeting**
   - Ensure that all participants understand the meeting’s agenda, objectives, and format.
   - Each attendee introduces why they are present and how they expect to be participating.

2. **Presentation by the Technical Lead**
   - Step through each slide of the prepared presentation materials.
   - Allow for questions and productive discussion on each slide.
   - A scribe (typically the Project Manager) records action items.

3. **Recap action items**
   - The Technical Lead summarizes the technical status, risks and issues.
   - Ensure that all review attendees are clear in their understanding of the technical status and their role, if any, in addressing risks/resolving issues.
   - The Project Manager records all action items on the project’s standard action item register.

4. **Metrics Collection by the Meeting Scribe**
   - Survey each attendee to collect metrics for this review:
     - Total Preparation Effort for each attendee parties (in hours)
   - Record meeting metrics:
     - Total Effort (in staff hours) in the review meeting and the duration of the review meeting.
     - Total count of new technical issues discovered, for each severity level.

5. **Publish Review Results**
   - The Technical Lead publishes significant technical decisions made during the review.
   - The Project Manager publishes the revised project issues/action item register in the next written Project Status report.
Prepare yourself for a Project Technical Review by:

1. Become familiar with the Project Technical Review reference materials
   - (They are listed on the next slide)

2. Become sufficiently familiar with the materials on the presentation template
   - Taking the online course that describes the presentation template
   - Reviewing the detailed notes for each slide in the presentation template
     • These notes are identical to the topics in the online course

3. Review the presentation “Introduction to the Project Technical Briefing”
   - These highlight some additional information that may be helpful
These materials enable effective implementation of Project Technical Reviews

- Introduction to the Project Technical Briefing
  - This *overview* provides a high level description of Project Technical Reviews that is useful in briefing executives, managers and the project team members on the benefits of these reviews and steps to use in implementing the reviews in an organization.

- Training on the Presentation Template
  - This 20 minute *training course* on Project Technical Reviews instructs the Project Technical Lead on preparation of the presentation materials, and helps the project executive/manager understand the topics that should be presented and discussed during a Project Technical Briefing.

- The Project Technical Review Process
  - This process overview describes the steps of a Project Technical Review.

- Presentation Template
  - This MS-PowerPoint *presentation template* provides all of the slides to be populated by the Project Technical Lead and presented at the Project Technical Briefing – extensive notes for most slides provide a reminder of the instructions provided during the training course on Deep Dive Reviews.