

POST-PROJECT BLUES

By Stephanie Maddocks

Many have long contended that implementing a large project is similar to childbirth: one night of bliss when the contract is signed, nine months of planning and preparation for the implementation, one day of pain and torture to go live, and then surprise!—your new project is up and running. It seems, however, that no one really wants to talk about what happens after the project is born, preferring instead to go back to their regular jobs and try to erase the implementation from their collective memories. However, at this critical point, there are significant benefits to be gained from a project post mortem review session to evaluate the success of the project.

Within the business world, successful outcomes can easily be judged by four performance criteria: goals, schedule, quality and budget. Within each of these categories, there are key metrics that are used to define success. During the planning stage of the project, project participants need to define and agree upon the desired goals, schedule, quality and budget outcomes. That is usually the easy part. Where modern business falters is in the lack of effective and productive project post mortem reviews to analyze how or if the project performed according to plan, thus creating a list of items to do differently the next time.

Productive project post mortem reviews are scheduled soon after the completion of a project, while the project details are still fresh in the participants' minds. They must include all key stakeholders in the project, as well as the project working team, in order to collect the entire team's input. These review meetings can be broken down into relevant sessions to allow full participation by all project team members. Effective post mortem reviews include the agreement to speak frankly about what went right and wrong with a project, in a positive and respectful manner, as well as the commitment to document these comments and an agreement to change to ensure that future projects are improved through this process.

Project post mortems expose the strengths and weaknesses of individuals, the team, the product and the operation. To effectively review a project post-implementation, it is essential to review the performance in each of the key criteria areas. It is easier to begin the discussions with the objective criteria areas, schedule and budget, as there are usually hard values to quantify the results. The subjective criteria, goals and quality, typically will spark more constructive conversations, as the measurements of these are much more subjective and open to interpretation by the team.

First, detail the final outcome against the project schedule. List the original schedule of the project, detailing key milestones and team members responsible for each milestone. Then, summarize what really happened in relationship to the plan, detailing the differences in terms of original dates and project assignments.

Second, describe the performance against budget. Detail the original budget goals for the project, including key cost goals, expenditure limits, revenue expectations and other financial measurements. Then, summarize what the actual cost/expenditures/revenues were in relationship to the budget and list progress against forecast and budget limits.

Third, explain the performance against the project goals. List the original goals of the project and the key measurements of success to support those goals. Then, summarize what really happened in relationship to those goals and the progress against the measurements of success.

Finally, illustrate the results against quality metrics. Describe the original quality goals for the project along with the measurements of success. Then, summarize what really happened in relationship to the quality goals and list progress against the quality metrics.

Once these steps are presented to and discussed by the team, a solid foundation detailing the desired and actual outcome of the project is created. These criteria may be reviewed for the project as a whole, or by individual contributing departments or functional areas. After the performance criteria have been evaluated, it is now time to review the planning and management portions of the project. Reviewing these segments of the project derives an understanding of how the project succeeded or failed based on the overall performance of the team and its leadership.

To begin, discuss how the project was planned, including who was responsible for the original plans, how well that the project planning team worked, and if it included the right set of people. Determine if fewer or more team members or representatives from which functional areas should have been involved in the planning stages. Also review whether or not the project was well defined from the start. Was there an actual written project plan? Was the plan effectively communicated? Discuss any communications challenges and what steps were taken or could have been taken to alleviate any misunderstandings during the project.

Take this opportunity to discuss the project plan in detail. Was the plan the right one? Was it a good plan? What was missing? These

answers help to determine if the plan was realistic or if expectations should have been modified before the project began. How did the plan change over time and were these changes good or bad? Define how the changes affected the project in terms of the performance criteria: schedule, budget, goals and quality. At this point, the team should have very specific recommendations about key areas for improvement for the project plan.

After reviewing the project plan, it is time to review the project management process and determine how the project was managed. During this phase, discuss meetings and who was invited, when they were held, how often they were held, and how well these meetings worked as conduits for information. Was the project adequately discussed and were issues resolved during the meetings? Were unresolved issues assigned to team members who were held accountable for their progress through completion of the tasks? Communication during any project is key and productive meetings are critical to overall project success. Also discuss other types of communication tools such as e-mail, websites, knowledge databases, calendars, and intranet tools and how well they worked to provide information to the project team members.

Change management is a critical portion of project management. Discuss how changes were tracked and how they were communicated to the team. Were changes discussed and communicated in a timely manner? How did the changes impact the overall project? Was the impact on the performance criteria considered whenever a change was proposed?

After reviewing performance metrics and the planning and management of the project, the team now has the tools available to define the key lessons learned during the project. This is an opportunity to define what went right with the project. At this stage, the team must be specific about what worked well. Noting that "the

daily 10-minute update calls were productive" is much more descriptive and repeatable than "the team communicated well." Any forms, processes, procedures, reports or other tools that were useful should be detailed here so that their effectiveness is logged for future projects.

This is also the time to summarize what went astray during the project, isolating specific attitudes, processes, procedures, methods, scheduling issues and other items that caused problems. It is also beneficial to discuss how the team responded to the obstacles and what methods were used to move on toward a successful project completion.

Once the key lessons are derived from the performance metrics and project review, ensure that the team documents its critical recommendations for future projects. This documentation, as well as the detail from the review sessions, can be distributed to the team members for reference as new projects are conceived and the implementation process begins again. While projects can be run without a plan and can be finished without a review, teams who take the opportunity to plan and review give themselves the tools to be successful and conscientious parents to their newborn, as well as to its siblings that are bound to arrive in the future.



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