Agenda

What we’ll cover:

The 3 fundamental approaches to troubled project recovery
The critical first steps in the recovery process
Five step process to recovering troubled projects
The 3 major obstacles to recovery and strategies for dealing with them

“A project gets six months late one day at a time”
–Anonymous

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What is a Troubled Project?

Troubled Project: Variance trends have exceeded acceptable levels of tolerance; project is heading for failure

Recovery: To quickly save from loss and restore to usefulness; prevent total failure

“Troubled, like beauty, is in the eye of the beholder”

When the Crisis Occurs

Troubled projects almost always occur towards the back end of the project life cycle.

Newtonian principles seem to apply: “a body in motion stays in motion unless . . .”
Guiding Principles

► Focus must be on the right issue
► Regaining control is the priority
► Do it with speed, accuracy, power, balance, focus

General Recovery Approaches

Only three fundamental approaches are available
- Change the scope
- Increase productivity
- Slip the schedule

Combining these however yields a fourth approach
- Change scope where possible, increase productivity as much as you can, and slip the schedule as necessary.
The First Steps

Assess the situation

How critical is the deadline?
What precisely is required to meet this deadline?
How willing is the customer to change scope, dates, budget?
What is done? What is not done?
What do you really need to salvage the project?

Determine each stakeholders’ “Win” needs

Understand how people want to win
Establish realistic expectations
Establish a realistic plan
Use the plan to control the project
Keep everyone involved
What was “wanted”

What was “needed”
What was “specified”

What was “delivered”
The First Steps

Prepare yourself and others to fix the project
Accept that the project is broken and you are in recovery mode
Accept that you cannot fix it by doing the same things that you have been doing
Prepare all stakeholders for significant change
Ask the team and stakeholders for their support and help
Gather and review key project archives

The First Steps

Ask the team what needs to be fixed
Meet with each team member individually
Ask what are the top five obstacles to getting their work done
Ask team members for five ideas for recovering the project
Ask what project management and leadership issues exist
Review a consolidated anonymous summary with the team
The First Steps

Focus work flow management via micro-management
Use miniature milestones (Inchstone)
Prioritize all work
Execute, monitor and control
Implement task by task labor tracking system
Re-calibrate after a short time

The First Steps—A Recap

✓ Assess the situation
✓ Determine each stakeholder’s “win” needs
✓ Prepare “yourself” and others to fix the project
✓ Ask the team what needs to be fixed
✓ Focus work flow management via micro-management
Overview of Rapid Assessment and Recovery Process

Assessment Phase

- Define charter
- Develop assessment plan
- Conduct assessment

Recovery Phase

- Develop recovery plan
- Conduct recovery

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<th>Description</th>
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<td>Finding people</td>
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<td>Assessment charter</td>
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<td>Develop recovery plan</td>
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<td>Exit review</td>
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Who thinks this process is a good idea?

(building talent, driving results)

(building talent, driving results)
Step 1—Define Charter

Formally sanction existence of assessment and recovery project
Provide assessment and recovery lead with proper authority
Complete activities necessary to develop assessment plan
Charter is essentially an assessment engagement letter
Step 2—Develop Assessment Plan

Develop a detailed assessment plan that—

- Achieves objectives of charter
- Allows assessment team to perform assessment quickly
- Ensures accurate findings
- Minimizes project team distraction

Rapid Assessment and Recovery Process

1. Define Charter
2. Develop Assessment Plan
3. Conduct Assessment
4. Develop Recovery Plan
5. Conduct Recovery

Process Overview

- Charter
- Establish Assessment Team
- Review/Analyze Assessment model
- Review Critical Documentation
- Develop Assessment Plan
  - Determine Approach
  - Develop Agenda/Interview Schedule
  - Establish Processes, Tools, & Methods
  - Establish Resource Needs
  - Plan/Schedule Kickoff Meeting
- Obtain Assessment Plan Sign-Off

Building talent, driving results
Step 3—Conduct Assessment

Determine true current status of project
Identify major threats, opportunities, problems
Begin considering recovery, as well as recovery team makeup

Rapid Assessment and Recovery Process
- Define Charter
- Develop Assessment Plan
- Conduct Assessment
- Develop Recovery Plan
- Conduct Recovery

Process Overview
- Establish War Room
- Assemble Assessment Team
- Kickoff/Distribute Questionnaire
- Conduct Interviews
- Analyze Project Data
- Rank Final Findings
- Validate, Update, Finalize Findings w/ Project Team and Sponsor
- Synthesize/Aggregate Final Findings
- Establish Preliminary Findings

Rapid Assessment Model

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Most Common Causes Observed

- No ‘real’ WBS
- No network diagram/critical path
- Lack of risk management
- Lack of basic management processes

Is recovery possible or even advisable?

Step 4—Develop Recovery Plan

- Develop plan leading to useful project
- Establish road map and process to achieve goal
- Continue to build confidence and morale

Rapid Assessment and Recovery Process

1. Define Charter
2. Develop Assessment Plan
3. Conduct Assessment
4. Develop Recovery Plan
5. Conduct Recovery
Step 4—Why this plan is different

Must not fail
Extraordinary scrutiny
Shorter duration
Tighter monitoring and controlling
Greater frequency of communicating and reporting

Basic objective—Rebaseline project plan, establish effective control processes, and DELIVER!

Step 5—Conduct Recovery

Execute inchstone and baseline plans to return project to usefulness
Validate estimating methods and accuracy
Produce accurate forecast of project completion

Rapid Assessment and Recovery Process

- Define Charter
- Develop Assessment Plan
- Conduct Assessment
- Develop Recovery Plan
- Conduct Recovery
Obstacles and Strategies

Accurate assessment of project problems difficult for PM team due to lack of objectivity
- Use outside assessment team
- Bring in technical specialists as required

Pressure from stakeholders to commit to new schedule
- Measured progress from inchstones will help tremendously
- Time is needed to determine work remaining
- Estimating variance data is needed to make accurate forecast

Obstacles and Strategies (Cont.)

Sustaining progress while planning recovery
- Additional temporary resources will be needed
- Project Manager must direct current workflow plus affect the recovery
Closing Remarks

- Do not declare victory too soon
- Sustained control is necessary
- It takes “teamwork”
- At first sign of any trouble, define problem and solution, alert stakeholders

Thanks for listening

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