



*"... building professionalism
in project management ..."*

How to Conduct a Project Review

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**"Those who cannot
remember the past are
condemned to repeat it."**

George Santayana

Agenda

- ◆ Why Project Evaluations ?
- ◆ Monitoring versus Evaluation
- ◆ Post-Project Evaluation
- ◆ Pre-project Evaluation
- ◆ Ongoing Project Evaluation
- ◆ Project Completion Evaluation
- ◆ Lessons Learned

Why Project Evaluations ?

- ◆ Projects have to be aligned with the Corporate Strategic Plan.
- ◆ To determine the effectiveness and efficiency in the use of the enterprise resources supporting the project.
- ◆ To keep the project in the best of health.
- ◆ Identify significant project problems on time and treat them appropriately.

Why Project Evaluations ? (Cont.)

- ◆ Learn from previous experiences and apply that knowledge in future projects or phases.
- ◆ Decide if the project should continue to the next phase.

Monitoring versus Evaluation

- ◆ *Monitoring* and *Evaluation* to collect information are an integral part of the control process.
- ◆ *Monitoring* means to keep track of and to check systematically all project activities.
- ◆ *Evaluation* is an examination and appraisal of how things are going on the project.

Types of Evaluation

- ◆ Post-Project Evaluation
- ◆ Pre-project Evaluation
- ◆ Ongoing Project Evaluation
- ◆ Project Completion Evaluation

Post-Project Evaluation



Post-Project Evaluation

- ◆ Provides to learn from past experiences.
- ◆ Is a sequence of activities that, when followed, will result in a conscious and planned attempt to prevent the next project from having to repeat the same neglects of its predecessors.
- ◆ Should be mandatory for ALL projects.

Steps for a Post-Project Evaluation

- ◆ Declare Intent
- ◆ Select participant
- ◆ Prepare for workshop
- ◆ Conduct workshop
- ◆ Present Results
- ◆ Adopt recommendations

Step 1 – Declare Intent

- ◆ Communicate verbally at an organizational meeting, then follow up with a letter to all project participants.
- ◆ The letter should state the goals of the post-project review and include an attachment that describes the process.
- ◆ The Post-Project review activity should be included in the project schedule plan.

Step 2 – Select Participants

- ◆ At least one person should be selected from each major organization.
- ◆ People selected should have a strong knowledge of the processes that were used in the project.
- ◆ The best candidates are team leaders.
- ◆ Managers should *not* participate on the review team.
- ◆ Participation of each representative in the review team must be mandatory.

Step 3 – Prepare for Workshop

- ◆ Each participant is asked to respond to a set of topics prior to the workshop meeting.
- ◆ The responses should focus on what went right, what went wrong, and what can be improved.

Step 3 – Prepare for Workshop

◆ Example of General Topics

- Staffing
- Mission objectives
- Product definition and change control
- Customer involvement
- Schedules and tracking
- Education and training
- Productivity
- Tools
- Quality
- Vendors and subcontractors
- People communications
- Other problems and/or suggestions

Step 3 – Prepare for Workshop

- ◆ Example of customized subset of topics (Test Organization)
 - Availability of needed product information
 - Test plan
 - Functional coverage of test scripts
 - Test scripts inspections
 - Running the test scripts
 - Problems discovered in product code
 - Tools required and/or used
 - Hardware availability

Step 4 – Conduct Workshop

- ◆ The workshop is a working meeting.
- ◆ Should last anywhere from one-half day to two days, depending on the size of the project.
- ◆ Each representative should present his or her responses to the topics that were distributed earlier.
- ◆ Set a time limit for each person (10 to 30 minutes)
- ◆ The meeting atmosphere must encourage full participation from all attendees.

Step 4 – Conduct Workshop

- ◆ Criticism of the process should be encourage, criticism of people should be prohibited.
- ◆ Create two lists:
 - “What went right” – things that you want to carry forward to future projects.
 - “What went wrong” – (not defects in the product) Focus on the top 5 to 10 problems.
- ◆ Develop proposals that address the identified problems.

Step 5 – Present Results

- ◆ Two meetings are recommended:
 - Present workshop's results to the project's leadership
 - Present the final results to all the other project members.
- ◆ Every attempt should be made to obtain the full support of the project's leadership in implementing the recommendations to the top problems as quickly as possible.

Step 6 – Adopt Recommendations

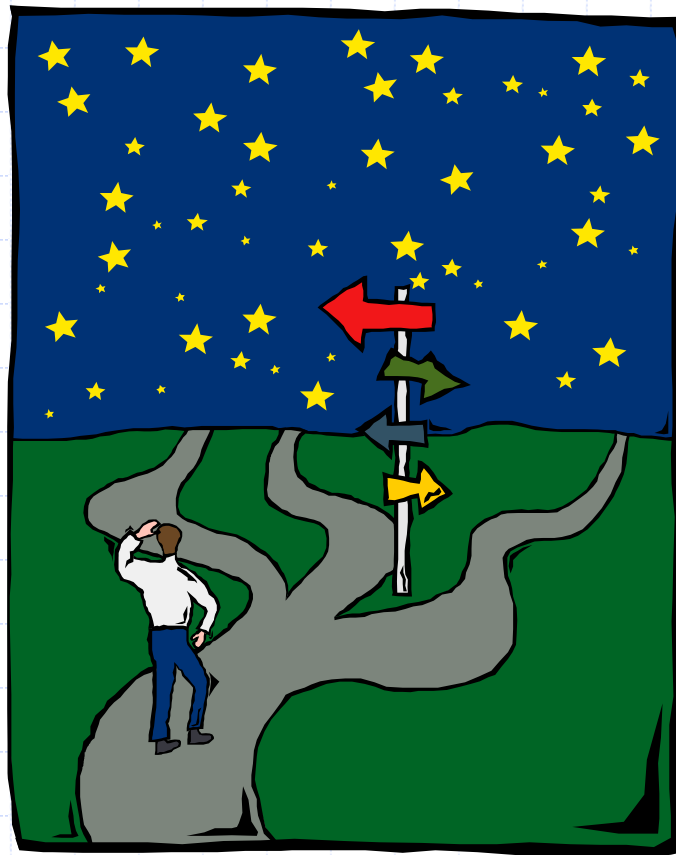
- ◆ Complete the Post-project Review Report.
- ◆ The real benefit of the post-project reviews is to apply lessons learned to other present and future projects.
- ◆ Past post-project reviews results examination should be mandatory for new projects.
- ◆ The project's leadership is responsible for acting on the committed recommendations.

Post Project Review Report



Microsoft Word
Document

Pre-Project Evaluation



Pre-Project Evaluation

- ◆ To determine if the project shows promise to the objectives and overall strategy of the organization or enterprise.
- ◆ Determine if the product or service obtained from the project supports the organizational mission.
- ◆ Part of the Initiation Processes

Ongoing Project Evaluation (Project Review)



Ongoing Project Evaluation (Project Review)

- ◆ Is an independent review that is performed at selected points along the development of the project.
- ◆ Allows an active project to be examined to determine its overall health.
- ◆ Actions are then assigned to immediately address any significant problems that are identified.

Steps in Conducting a Project Review

- ◆ Schedule project review
- ◆ Select reviewers
- ◆ Prepare for project review
- ◆ Conduct project review
- ◆ Present results
- ◆ Address problems found

Step 1 – Schedule Project Review

- ◆ Perform every 3-4 months
- ◆ Determine strategic points within the project plan to conduct project reviews
- ◆ Schedule all project reviews as activities to track in the project plan.

Step 2 – Select Reviewer

- ◆ Project reviews are typically coordinated by the PMO, an assurance group, or the project manager
- ◆ Review team is typically comprised of from 1-5 “experts” from outside the project
- ◆ Reviewers are selected at least several weeks before the project review.
- ◆ If the reviewers perform satisfactory, attempt to retain the same reviewers for all reviews.

Step 3 – Prepare for Project Review

- ◆ Review team prepares a list of topics for each project area to address
- ◆ Each project area will prepare a brief presentation to address the topic
- ◆ Allow at least two weeks for project areas to prepare.

Step 3 – Prepare for Project Review

◆ Sample topics of interest for a Project Review

- Overview of product
- Staffing and skills
- Project organization, roles and responsibilities
- Overview of schedules and milestone
- Significant problems
- Project outlook
- Other (including business and legal issues)

Step 4 – Conduct Project Review

- ◆ Select a designated leader of project review team
- ◆ Duration: typically 2 hours to 1 day
- ◆ Objective: Identify significant problems and significant areas of praise
- ◆ Project areas present their information and answer questions from the review team

Step 5 – Present Results

- ◆ Review team leader:
 - Present informally to project manager
 - Presents to management
 - Presents to all project members
- ◆ Presentation includes:
 - “What went right” list: top 3-5 items
 - “What went wrong” list: top 3-5 items
 - Overall assessment of likelihood of project meeting its schedules, cost, and quality

Step 6 – Address Problems Found

- ◆ Project manager should assign an owner and define action items to appropriately address the top 3-5 problems
- ◆ Support from management and sponsor may be required
- ◆ If another project review occurs, include assessment of the resolution of this problems.

Project Completion Evaluation



Project Completion Evaluation

- ◆ For an immediate assessment of success upon project completion.
- ◆ Is directed primarily toward the *product* rather than the *process*
- ◆ The focus is on determining the readiness of the product.
- ◆ Culminates with a “Go” or “No go” signal for delivering the product.

Lesson Learned

- ◆ Include project reviews activities in the project plan
- ◆ Don't "boil the ocean" – Identify the most important problems to work (Top 3-5 priorities)
- ◆ Project reviews should be mandatory
- ◆ Neglect always carries a high cost.
- ◆ By understanding past projects an organization can realize big savings

Lesson Learned(Cont.)

- ◆ Project Evaluation(Review) concept has great value to an organization and ultimately to the acceptance of the product by its customer.
- ◆ Basic project management discipline should be used to conduct project reviews. Specially, for complex projects.

Q & A

How healthy are your projects ?

◆ References

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◆ For more information visit:

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