Where and how do we start?

As we would with all investigations, we commence with questions. We ask a series of questions to retrieve the facts. Leave all opinions at the door until we are satisfied that we have all the data we need to proceed to the next stage.

Once we have gathered all the required information, we can then assess the evidence to uncover the root cause or causes of the issues experienced. This is the best opportunity to learn. We must learn from the problems encountered so that we can avoid a recurrence of similar issues in the future.

Once the root cause is clear and the lessons have been learned we can re plan with confidence. We must then mine deep into every detail needed to produce the most realistic plan possible.

Then when the planning is complete, we can kick off the project once again and put monitoring and controls in place to allow us to run the project effectively.

Project Management can be a lonely road upon which to travel. You will need all the support you can get to make each complex project a success.

Honesty, openness, and transparency will go a long way to maintain effective project management. Other overused terms such as stakeholder engagement and support from sponsors will be examined. We will look at how we can get the most out of these relationships.

Not all projects are recoverable, and some hard decisions may need to be made. Although the focus of this course is project rescue, if the project is not recoverable, the process described here will enable the stakeholders to make an informed decision based on solid information.

This training programme has been designed to simplify the process of troubleshooting a project, identifying what went wrong and re-planning and running the project to be successful.

In simple terms we need to understand what went wrong.

We need to understand how and why it went wrong.

Only then is it possible to learn from the errors of the past and re-plan the project with confidence.

Once the project is up and running once more, we need to have processes and procedures in place that expose any potential issues or risks at an early stage so that major issues can be managed and avoided.

We start by looking at the facts. If we deal with the facts and not the interpretation of the facts we will get to the root cause much faster.

This section is all about information gathering. We gather information by observing the evidence and asking questions.

These series of questions have been honed over many years and have been chosen to get people thinking differently.

Start with something fundamental to the investigation.

The first and most important question that can be asked at this stage is: -

How do you know that there is a problem with the project?

Think about this for a moment. When you arrive on the scene or before you arrive on the scene please ensure that this is the first question. Each person you ask may have a different answer. It is at this point that you will begin to hear interpretations of the facts mixed in with some facts. You can begin to gain control of the situation by framing the questions in simple terms.

"How do you know that there is a problem with the project?"

"What was the first symptom that indicated there is a problem with the project?"

What one event triggered the project stakeholders to seek help or to make the statement that the project was in trouble?

Look closely at the answers here.

Are we dealing with symptoms of the problem or have they hit the nail on the head and isolated the root cause of the problem already? What is their own current perception of the nature of the problem?

Project and programme problems are rarely simple, particularly where software implementation is concerned.

The symptoms of these problems can be categorized but are generally broken into the following categories with an impact on:

- Schedule
- Cost
- Scope

In order to commence the investigation, you need to ask questions, lots of questions.

Where did the project expect to be at this stage?

For example – if the schedule is late or has missed a major milestone – what didn't happen or what happened that caused a milestone to be missed.

When was it first realized that there was a problem?

What was the one event or missed milestone that indicated there was a problem?

Why was this milestone delayed or why did it not happen?

Who was responsible for delivering the task?

Was this a known risk or an unknown issue?

When was it first acknowledged that the milestone would be missed?

What were the indicators that the milestones would be missed?

What action(s) was/were taken to prevent it from being a missed milestone?

Review the Original Objectives and Scope – Are the original Objectives and Scope of the project still valid? Have the objectives and goals of the project changed? Has the scope changed enough to significantly derail the project?

Review the Project Performance to Date in Detail – List all of the key deliverables and milestones and assess:

- Where should they be in terms of completion / delivery?
- Where are they actually in terms of completion / delivery?

e.g. – assess the original plan against the current status in detail – there is no shortcut here – this will take time and the devil is in the detail. There can be a huge number of individual tasks in a large project, so this process is not for the faint hearted.

You must encourage the interviewees to be as binary (yes or no answers) as possible during this initial review so that the results are honest. It is important to note that you will not make any friends during this process so try to take the emotion out of discussions by maintaining a clear focus on the facts.

Some clients may hire in external resources with no personal history on the site in order to get to the facts and remove the possibility of any personal influence. This can often be the most challenging element of the investigation. You must remove the personality from this exercise. Do not allow any personal relationship that you may have with someone to cloud your judgement or influence your decision. (If you feel that you cannot objectively judge a situation for some reason, call for help from someone who can)

If a task is late or has had to be repeated has this resulted in an increased cost? Is this substantial? How is this being measured on an hourly/daily basis?

The information gathered from this review process will arm you with the factual data from which you can get to the root cause of the problem(s) and re-plan the project to get back on track for a successful outcome.

In these situations I normally refer back to the advice of a fictional 19th century detective - "First observe, then once you have observed, the deduction can commence. Through process of elimination you will then come to the correct conclusion" This is all about detail detail detail. Do not make any judgement until you have the reviewed the detail that we will cover in the next section. A number of facts when viewed together can lead the investigation down a different path than if viewed in isolation.

Project Risks – Review the original project risks to assess if they are still valid. Have the project risks been updated? Are there any new risks that need to be assessed? How will they affect the project? Have any of the original or new risks been realised? Have they had any impact on the project delivery?

Analyse the Data – Are there any patterns emerging from the review data. Using these results – look for patterns such as consistent issues with departments, people, vendors – that are consistently late or repeating tasks not completed correctly.

If there is an obvious pattern with a deliverable or task and this is identified back to a person or a department, look for further evidence.

Is the person experienced enough?

Are they the right person for the job?

Is their role in the project clear to them and everyone else?

Are they doing other work that is preventing them from focusing on project work?

Are they capable of the work assigned to them?

How was this person or department originally assessed for capability?

How was individual performance being monitored?

Are there other factors influencing delivery -e.g. personal behaviours, interdependent service inefficiencies, process issues, system issues, late equipment/software material delivery, procurement issues?

Are operations based resources being allocated enough time to work on the project? Has the client prioritised the project to reflect the required delivery times?

The purpose of this analysis should not be a witch hunt but an honest review of the data recorded in order to get to the real issues.

Do not overlook here the need to review the controls processes if they fail to capture an issue early enough to control the issue.

So with all of these initial questions now complete, do you now know what went wrong?

This could be just one event or could be a series of events. This process should not be deemed to be complete until you have found the "what".

When dealing with people in a challenging situation like a failing project, you need to choose your words, phrases and resulting actions very carefully. The slightest misinterpretation will make it much more difficult to get to the facts.

After every meeting or Q and A session I would encourage you to get some time on your own in a quiet office to ensure that you are capturing the important points of each discussion and not just taking notes for the sake of it. Take whatever approach is most effective here with regard to note taking - everybody has their preferred method. The only option I would advise against is making an audio recording of the interview or discussion. This normally makes people clam up and makes them suspicious of your intentions.

Try to understand what is being said. During the interviews, apart from your questions you should say very little. Listening is a real skill. Don't just listen to be polite or to wait for your turn to speak, listen because you are seeking to learn something.

Have you had enough yet? Let's move on to the next section.