Rescuing a Problem Project

The following provides "food for thought" when approaching corrective actions with Red Projects. A "red" project can be one that has or will miss the end date, currently exceeding budget or has failed to meet project requirements.

Nothing frustrates me more than wasting an hour in a status meeting as the project manager waffles about milestones and shuffles through piles of Microsoft Project printouts.

But painful meetings like these aren't just frustrating. They can be symptoms of deeper, more critical issues that can doom your project. So I thought I'd share with you the eight telltale signs that your project is headed for serious trouble.

1. There's no compelling business case. Is that "super-cool" Flash brochure-ware site really going to increase revenues?
2. You're coding from the "spec of the day." If you can't agree on requirements or system specifications, how will you know whether the deliverable works or which spec is the most up to date? You won't.
3. You don't have a project plan. This one speaks for itself. A scary variation is when an e-mail thread becomes the functional specification.
4. You and your client aren't on speaking terms. When this happens, you must fight the urge to start insulting the sponsor's family members.
5. The project sponsor lives in a cave. This one hurts—especially when you need to ask for additional resources. There are only a couple of things more humiliating than when your boss asks for more contractor dollars and a senior manager just rolls his or her eyes.
6. There's no change-management system. Debugging is for wimps. Besides, my code runs right the first time! Or did you get that e-mail asking for "a few small changes?"
7. There's no status reporting system. One reason your faltering initiative lacks an accurate reporting system may be that the project is so far behind, nobody wants to talk about it.
8. In status meetings, you pass the painful minutes by counting the times anyone says "interface," "action item," and "go-to person."

Of course, taken singly, none of these symptoms means your project is definitely doomed. But they're all red flags that demand you take action. If your project suffers from all eight, you're on the Titanic and had better start surfing Careerbuilder.com for greener pastures.

Accepting the Facts

This process starts by discussing the biggest hurdle in rescuing a project—realization that there is a problem—and proceeds though detailed discussion of the four step process to recover them—**audit, analysis, negotiate, and execute**. In addition, it includes a complete discussion of four key processes to prevent failure. *Source: Todd C. Williams*
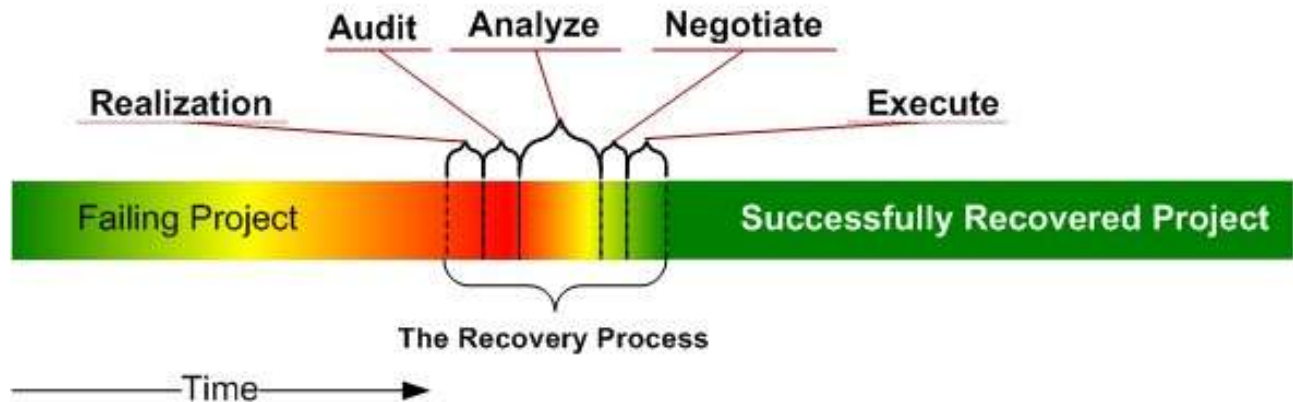
The Recovery Process Chart - Source: Todd C. Williams

The Red Project Recovery Plan

Using the following 6 Recovery Plan Steps will assist you with assessing the project from start to the original end date and how to develop a "realistic" recovery plan that management will buy into.

STEP 1 - Understanding the Process and Realizing there is a Problem

The Basics of the Recovery Process
1. The Context of a Project
2. Understanding Project Success
3. What is a Red Project?
4. What is Project Failure?
5. What is Project Recovery?
6. The Recovery Process
7. Roles in the Extended Project Structure

Realizing a Project Is Problematic: Management's Responsibilities
1. Declaring a Project Red
2. Traits of a Good Recovery Manager
3. The Relationship of the Candidate Recovery Manager to the Project
4. The Benefits of Involving a Third Party
5. Creating the Assignment's Statement of Work
6. Defining the Responsibilities by Phase in the SOW
7. Establishing the Recovery Manager's Authority
8. Accepting the Role as a Recovery Manager
9. Creating an Outline of the Recovery

STEP 2 - Auditing the Project: Understanding the Issues

Assessing the Human Role in Project Failure
1. Who Should Be Interviewed?
2. Interviewing the People Involved in the Project
3. Interviewing Techniques
4. Dealing with People Who Refuse to Talk
5. Interviewing Management
6. Interviewing Subcontractors
7. Interviewing the Customer
8. Interviewing End Users
9. Remote Teams, Time Zones, and Workweeks
10. Assessing the Effect of Cultural Differences
11. Assessing the Applicability of Core Processes
12. The Outcome of the Interview Process

Auditing Scope on a Red Project
1. Determining the Efficacy of Change Management
2. Auditing the Completeness of the Project Documentation
3. Scope Creep Induced by the Project Team
4. Saying No to Limit Scope Creep
5. Dealing with Demanding Customers

Determining Timeline Constraints
1. Confirming the Project's Triple Constraints
2. Validating the Schedule's Derivation
3. Issues to Investigate on Estimation Methods
4. Understanding How Team Progress Is Reported

Examining Technology's Effect on the Project
1. The Importance of Technical Expertise in the Audit
2. Understanding the Technology Goals of the Project
3. Understanding Architects' Biases
4. Assessing Technology's Effects on the Team's Behavior
5. Assessing the Team's Capability With a Technology
6. Evaluating Make-Buy Options

STEP 3 - Analyzing the Data: Planning for Project Recovery

Determining and Initiating Remedial Action
1. The Audit Report
2. Determining Whether to Continue or Cancel the Project
3. Transitioning from the Auditor's Role to Taking Charge

4. Planning the Right Level of Process for the Project
5. Requiring Meeting Minutes
6. Implementing a Change Management Process
7. Developing a Thorough Understanding of Project Risk
8. Tracking Contingency
9. Creating a Short Horizon Schedule

Building an Extended Project Team
1. Being Realistic About the Team's Ability
2. Actions on the Team
3. Canceling Overtime
4. Handling Team Members Who Are Prima Donnas
5. Dealing with Management Problems
6. Developing Plans with Subcontractors
7. Boosting Morale with an Early Win for the Team
8. Improving Communication with all Stakeholders
9. Preparing to Negotiate with Management
10. Steering Committee and Status Meetings
11. Debunking Myths and Promoting the Project
12. Communicating with the Project Team
13. Communication Guidelines

Considering Options for Realigning Technology
1. General Issues to Consider When Assessing Technology
2. Dealing with Technology Induced Scope Creep
3. Developing Custom Technology Components
4. Handling Issues with Common-off-the-Shelf Products
5. Resolving Conflicts between Business Goals and Technology Implementation
6. Environments for Building and Testing the Project's Product

Assessing How Methodology Affects the Project
1. Methods of Developing Schedules and Estimates
2. Gathering Project Progress Estimates
3. A Hypothetical Example for Comparing Methodologies
4. Phasing the Hypothetical Project's Deliverables
5. Using Agile in the Hypothetical Project
6. Using Critical Chain in the Hypothetical Project

How Agile Methodology Can Assist in a Recovery
1. Agile Methodology's Basics
2. An Agile Project's Lifecycle
3. The Effect of Project Size on Agile Projects
4. A Critic's View of Agile
5. How a Partial Implementation of Agile Can Be Achieved

How Critical Chain Methodology Can Assist in a Recovery
1. Understanding the Theory of Constraints

2. Understanding the Principles of Critical Chain
3. Differences in Doing Scheduling Estimates in Critical Chain
4. Optimizing Resource Utilization
5. Using Critical Chain for all Projects Sharing the Same Resources

Comparing the Relative Value of Methodologies for Project Recovery
1. Change Management
2. Customer Relationship
3. Estimations
4. Process
5. Project Constraints
6. Project Manager
7. Subcontractor Relations
8. Team Focus
9. Team Members
10. Variation

STEP 4 - Negotiating a Solution: Proposing Workable Resolutions

Proposing and Getting Agreement on a Recovery Plan
1. The Process of Negotiation
2. Project Items That Are Not Part of the Negotiation
3. The Goal of Any Negotiation
4. Failing to Deliver Functionality: The Consequence of Failure
5. Offsetting Removed Functionality: The Wish List
6. The Goal of the Negotiation
7. Compiling a Complete Negotiation Package
8. Preparing the Information for Presentation
9. Preparing the Attendees for the Meeting
10. Selecting the Venue and Preparing the Agenda
11. Variations on the Meeting Goals

Dealing with "Red Projects"
1. What to Do When Maintenance is Part of a Project
2. How Data Utilized by a Project Is Handled
3. Problems When Mixing Strategic Initiatives and Tactical Projects

STEP 5 - Executing the New Plan: Implementing the Solutions

Implementing Corrective Actions and Executing the Plan
1. Implementing Corrective Actions
2. Special Problems That Exist on Recovered Projects
3. Old Problems Reoccurring
4. Root Causes That Were Missed
5. Dealing with People's Perception of a Failed Project

6. Management's Overreaction to Small Problems
7. New Scope Creep

PART 6 - Doing It Right the First Time: Proactive Risk Management

Properly Defining a Project's Initiation
1. Customer Inception: When the Project and the Problems Really Start
2. Using a Guidance Team to Smooth Project Start
3. Improvements to Project Proposals and Charters

Assembling the Right Team
1. Constructing the Team
2. The Project's Management Team
3. The Dangers of Reusing Teams on New Projects
4. Ensuring the Team Is Competent
5. Team Considerations When Using New Technology

Properly Dealing with Risk
1. How Understanding Risk Can Help Projects
2. A Real Project Scenario
3. Using a Real Project Scenario to Understand Risk
4. Quantifying Risk in the Sample Scenario
5. Representing Unquantifiable Risk
6. Correctly Classifying Risk for Proper Analysis
7. Determining the Budgeted Cost for Risk
8. Determining the Event's Probability
9. The Impact if a Risk Fires
10. Tools for Calculating Risk's Impact

Implementing Effective Change Management
1. Properly Handling Change During a Project
2. Minimizing the Impact of Change in a Project
3. Defining and Processing a Change Request
4. The Five Sections of a Change Request Form
5. Tracking Change Requests in a Log