

Project Success through Effective Reviews

A project can be defined as a piece of work that is undertaken to achieve defined objectives within a defined timeframe. Critical elements of the above definition are “achieve defined objectives” and “within a defined timeframe”. If any one of these is not met, a project might not get classified as successful. To achieve ‘success’, tracking and reviewing a project effectively is very critical. This involves time and efforts of several team members as well as Project Champions/ Sponsors / Facilitators.

Many organizations have been struggling to get 100% improvement projects completed, as per planned timelines. This results in huge direct monetary losses to organizations as well as intangible losses of potentially higher value like losing customers, tagging initiative as a failure, negative impact on employee morale, to name a few.

This article will talk about reviewing mechanism for improvement projects, which can be generalized and extended to other types of projects to enable timely project completion. The areas covered are type of reviews, pre-review preparations and review questions which can be asked.

Let us first talk about various types of reviews which can be carried out based on the requirement.

Types of reviews:

Many organizations feel apprehensive to plan frequent reviews as it demands for a lot of employee time. Hence, fewer numbers of reviews are planned for a given project. This can sometimes have a negative impact on the project and may even result in failure of a project. The project reviews can be broadly classified into three categories namely standing reviews, status review and stage-gate reviews. These are explained in details as follows:

- a. **Standing reviews:** A project can succeed in any organization if there is continuous involvement and regular discussions/actions happening on projects. They say “**Out of sight is out of mind**”. Most of the mentors avoid reviews as they consume more time hence they get plan reviews with a longer gap between them. Standing reviews are designed to take care of the review/meeting duration. Here, it is advised that every project must be discussed by the entire team on the progress and action to be taken for the day for a max of 5 to 10 minutes on daily basis. Standing mode actually helps in avoiding extension of review meetings, which otherwise could lead to avoidance of the meetings. Short reviews not only create excitement within the group, but benefits in areas like keeping the project fresh in everybody’s mind, faster decision making, removes barriers, keeps project on track and avoids procrastinate reviews.
- b. **Status reviews:** The status review is more into actions planned for the project. This typically involves the project leader and mentor or could be between the project leader and responsible team members who have been assigned certain task(s) to be completed as a part of the project. Conducting these reviews will not only provide clarity on the project/implementation status but also keep the project running without losing on time by involving all stake holders for a discussion/meeting. These are done on need basis and are mostly conducted between stage-gate reviews. These reviews are mostly planned for 15 to 30 minutes depending on the project.
- c. **Stage gate reviews:** These reviews are detailed reviews which are carried out in the presence of all stake holders and mostly happen at the end of a stage of the project. E.g. during the launch of a project, completion of Define phase, etc. These reviews mostly get into details of actions identified/ implemented, accuracy and completeness of the work

done in the stage, plan future course of action, etc. These reviews being detailed usually run for 45 to 60 minutes.

The next section will talk about the preparation part for the review meetings.

Pre-review preparations:

- **Plan the reviews:** Every project can be divided into several stages with milestones attached towards the end of a particular stage. This division is based on methodologies practiced by organizations and hence, could vary. The Champion or stake holders must agree the stages and communicate the date/month of all these stage-gate reviews. Some teams practice process of finalizing all the dates of reviews in advance whereas others decide on first two at date level and the remaining at month level. Gradually, they get additional review planned for a specific date once they are done with one review.
- **Presentation Format:** Many meetings run out of time and end up not completing items listed to be closed on agenda due to lack of systematic approach or digressing from identified items. This is usually observed when there are several members who need to present their information, or when the individual is presenting for the first time or presence of members not aware of the subject. It has been seen that having a format designed in advance and circulated to all members who are supposed to present their project progress can not only save on time but, also increase the effectiveness of the review/meeting.
- **Agenda:** Creating a list of items to be discussed forms the major part of any review. This list could be created based on the type of review and the stage of the review. It is the duty of the Champion/Project Leader to create a suitable agenda and share it with all stake holders (especially those who will be present for the meeting) well ahead of time. This should also include the role of every participant so as to enable them to be prepared for questions/answers arising during the meeting. Please note that, no participant should be included in the list of attendee who is not having any say or contribution in the meeting. This may lead to unnecessary discussions leading to wastage of time.
- **Infrastructure:** A survey conducted in the US found that if arrangements are done well ahead of time for a meeting, it can save 30% of the overall review time. Study shows that there is substantial amount of time lost in areas like assembling members, turning on computer/laptop, setting up the projector, searching of data/files, waiting for previous meeting to get over in the same conference room, connecting on conference call, availability of adequate chairs, etc. The meeting initiator is responsible to ensure that the above items are made available and tested 15 to 20 minutes prior the meeting so that participants joining for the meeting do not lose on time and the meeting runs as per schedule. It will also help if meeting rooms' booking status is centrally available so that proper planning can be done to avoid last minute conflicts.

The last section will focus on the questions which can be asked during a review to improve the review's effectiveness and hence, achieve the desired review objectives.

Review Questions:

The success of any review lies in the hands of the reviewer. This in turn is decided by the questions asked to the Project Leader/ team members on the progress of the project. The questions enable the reviewer not only to get complete updates on the project but also push the team members to get deliverables completed on-time leading to closure of the project at targeted dates. A list of questions can also be made/ provided to the reviewer by an expert as per the stage / type of review.

Some sample questions are listed below:

1. Is the project defined? Can we agree on the following:

- a. Start Date and Closure Date
- b. Project Scope
- c. Metrics and targets
- d. Financial Benefits (if any)
2. Show me the performance of the metrics so far in the project.
3. Why XYZ person is not in your team?
4. What are the key findings so far? Show me the responsibilities assigned with target dates?
5. Show me your meetings' performance (attendance, objectives achieved vs agenda etc)
6. Have you involved the process owner and team members in the brainstorming and identification of actions?
7. Why this task needs 5 days to close? What is the plan for the project and on this task for the next two days?
8. What is the basis of this inference?
9. What are the key obstacles you are facing and how do you intend to solve them? Do you need any support from senior management?

If the above elements for project reviews are taken care of, the organization will see tremendous improvement in the progress of projects, leading to timely and successful closure of the same. This demonstration of timely success repeated over a period of time will build the required momentum to change the culture of the organization, which in turn makes the improvement initiative self-sustaining. (Refer figure)



Fig: The Cycle of Change

One in a series of thought articles from Breakthrough Management Group India

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