Yuj Advies bv

Dynamic Project Evaluation (DPE)

Dynamic Project Approach

"Situational Project Management"

Energy

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Visionary Style

Relational Style

Completion Style

New PM

New PM

Time

Possible Failure

Possible Failure

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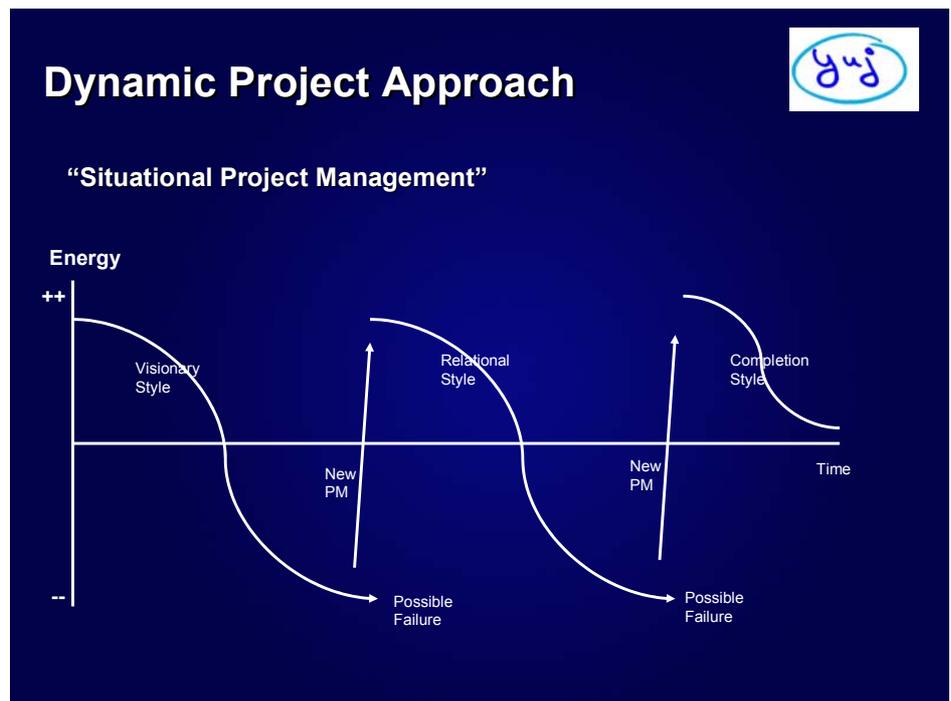
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Content

Summary

The Project evaluation Service is designed to collect the "Learning Money" organizations invested in their project experience. The service helps to increase the project predictability, lower project risks, deliver better "plannable" results and less overshoot. On the other side the use of the evaluation services delivers more energy for people involved and less casualties in the project management profession.

Three services

1. Project Kick-Off Workshop

Dynamic Project Evaluation (DPE)

The project kick-off workshop is meant to introduce the evaluation experience available in the DPE repository to do a better planning and resource allocation. The workshop delivers a risk assessment, recommendations and an action plan.

2. Project Scan

A project Scan brings insight in proceedings, risks, bottlenecks and current leadership style. It delivers recommendations about minimizing follow-on risks and "energizes" the team. The action plan is meant to implement workshop findings.

3. Post-Project Evaluation

Key elements of DPE. By evaluating every project experience builds up for as well customer as supplier(s). All project participants experience the evaluation as both a formal and an emotional end of the project. Learning points are made explicit and translated into a formal heritage to both customer and supplier(s). Follow-up action plans reassure improvement and corrective actions based on possible negative findings. Positive findings are made explicit and are fed back into involved organizations. Doing so builds up a positive spiral of motivation and increases effectiveness of future endeavors.

Evaluation, Audits and "Delivery Protocol"

The words audit and evaluation are often used for the same thing. Within DPE however evaluation and audit have quite different meanings.

Evaluation has as goal to learn and as stated above to collect the learning money invested in project experience. By doing this the current project and future projects will benefit from the experience as elaborated above.

An audit is done against project criteria, which are standardized and set in advance. The audit delivers insight in the sanity on the project, but is not optimized to learn or to optimize the fit between management style and phase.

Most professional service companies use a formalized "delivery protocol". The evaluation is not meant to be done in place of such formalized project ending. Many customer organizations still do not use formalized project ending protocols. In the past the DPE Post-Project Evaluation service has filled that need for customers and it will probably do so for some time in the future.

Introduction

DPE Project evaluation Service is designed to collect the "Learning Money" organizations invested in their project experience. Without proper evaluations the learning investment flows away after successful or unsuccessful projects.

Experience learns that by systematically evaluating project risks are lowered, results are delivered earlier and project costs are more predictable. Conducting an evaluation can bring energy and even fun back into a project.

Dynamic aspects of the Project Evaluation

Evaluation experience shows that many projects show different "style phases". Firing the project manager and finding one that is a solution to the build-up problems frequently characterize the end of each phase.

By understanding situational project management, the transition of styles and thus of project managers can be smooth without loosing momentum in the project. This gives project managers the possibility to leave a project without professional damage and hand the project over to a colleague with the leadership style that is appropriate for the project in that phase.

The result of proper "Situational management" of a project is
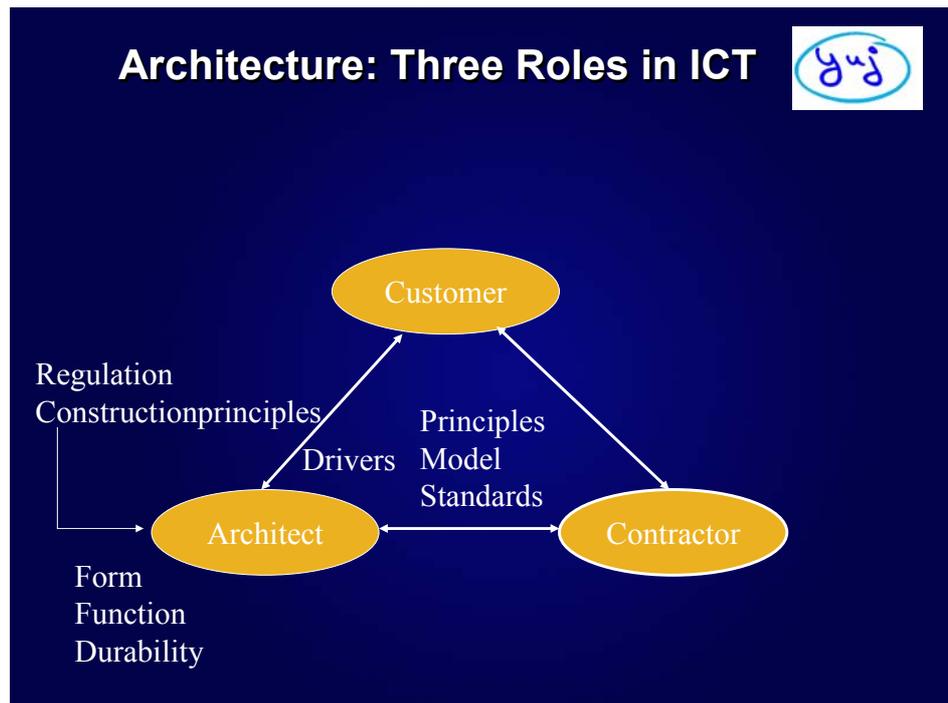
+ Increased Project effectiveness
+ Better Cost Control
+ Less risk of Overshoot
+ Better plannable results
+ Quicker results
+ Less organizational frustration and damage
+ Less project management casualties
+ Higher motivation for all involved
+ Increased customer satisfaction
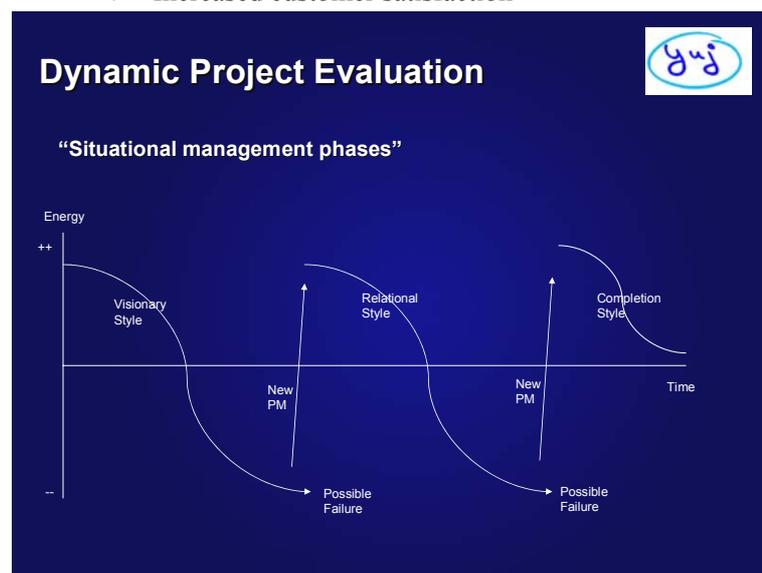
DPE and Enterprise Architecture

The picture below gives three roles from an Enterprise Architecture perspective. The Architect is responsible for the repository of knowledge about building principles and regulation. The Architect is the natural party to conduct an evaluation and build and foster the accumulated learning. The Architect may be a role of person(s) inside customer or supplier organization or he or she may come from an independent third party.

Architecture: Three Roles in ICT

Customer

Regulation
Constructionprinciples

Principles
Model
Standards

Drivers

Architect

Contractor

Form
Function
Durability

Project Kick-Off service

Introduction

The DPE Kick-Off Service exists of a half day workshop with typical 8 to 18 key project participants. Included in the report are recommendations based on the DPE repository and experience. Participants represent all project stakeholders.

Kick-off Workshop

As preparation participants will receive briefing documents based on the checklist "Possible topics of an evaluation" (Appendix 1).

Agenda for 3½ hours kick-off workshop

Opening by the sponsor
Introduction Kick-Off service and checklist
Foreseen Problem inventory, clustering and priorities
Root-Cause analysis
Recommendations inventory
Including possible bottle necks for recommendations
Action inventory
Closure

Typical results

The results form a familiar list of problems in setting Goals, setting and maintaining Scope, dealing with Politics, getting and keeping the required Top management involvement and getting and keeping the required skills mix and capacity. It is not so much the result itself but *the process of making the inventory and finding the specific root causes and required actions together*. Key aspects: Consensus about the results, commitment about the possible solutions and a result that can be communicated to others involved including the customer and YA sponsor(s). The build up commitment results in better plannable results and less overshoot.

Service description

1. Preparation
2. Delivery of workshop
3. Report writing
4. Recommendations writing based on DPE repository
5. Reporting
6. Archiving "Depersonalised" Results in DPE repository

Delivery time

Typically this is a half day 3-4 hours workshop

Project Scan

Introduction

The project scan is used once (or periodically during long , >6 months, projects) to verify project progress, sanitize the project or to assess a possible needed change of leadership style (possible transition moments are already defined in the DPE kick-off session). By optimizing the fit of leadership style and phase the project execution time and costs are optimized. The Project Leadership Style Optimization is one of the core strengths of DPE. An Architecture framework will be used to check progress and coverage of essential project parts and Architectural consistency.

Interviews with project manager and sponsor are needed to decide about the optional use of the leadership style module for the scan.

Scan Workshop

Daypart (morning or afternoon) or 1 day

    Opening by the sponsor or senior project manager

    Introduction DPE service and repository

    Timeline building (See Appendix 2)

        Events

        Milestones achieved / not-achieved

        Analysis of achieved / not-achieved

        Future milestones projection

    Learning point inventory

        Clustering

        Priorities

    Optional 1 day: Leadership styles intervention

        Leadership self assessment tool (Brainmap or other)

        Styles discussion and positioning of team

    Optional 1 day: Change Agenda Check (See Appendix 2)

    Problem Inventory OR Optional 1 day: SWOT

    Optional 1 day: Root Cause Analysis

    Risks inventory

    Recommendations

    Actions

Typical Results

The scan revitalizes the project.

Team members feel energized and reconnected to goals and scope. The project is assessed against originally set implicit and explicit expectations and goals. The YA-ITSA framework is used to check consistency against the originally designed Architecture. If the customer uses another Architecture method or model (e.g. Tapscott) these are used. The Timeline exercise (Appendix 2) gives shared insight in proceedings, bottlenecks and root causes of milestones achieved and not achieved.

Possible outcome of the optional leadership style intervention is a planned transition in leadership style and a possible change in project manager.

Service Description	1. Preparation: Interview Sponsor and Project Manager
	2. Delivery ½ or 1 day workshop
	3. Report writing
	4. Recommendations writing based on DPE repository
	5. Reporting
	6. Personal Feedback to Sponsor and Project manager
	7. Archiving depersonalized results in DPE repository

Organizational Check

Every project has organizational change aspects. Some projects are pure organizational change. The DPE project scan uses a well established "Change Agenda" as a check for completeness of integral change management. If the completeness check shows weaknesses, corrective actions will be advised.

Duration

Preparation
Interviews with project manager, Project leader(s) and Executive sponsor:
½ day per interview
Workshop
Preparation, Delivery, Report and Recommendations writing
3 days
Reporting
½ day
Total 4 – 6 workdays over 1 to 2 weeks elapse time

Post Project Evaluation

Introduction

The formal closure of a project mobilizes energy to start new assignments. The post project evaluation capitalizes the learning invested in the project. By making the project learning explicit, other projects will be executed smoother, quicker and with lower costs.

Typical Post Project Evaluation Workshop

Daypart (morning or afternoon) or 1 day

Opening by the sponsor or senior project manager

Introduction DPE service and repository

Timeline building (See Appendix 2)

> Events
>
> Milestones achieved / not-achieved
>
> Cause analysis of achieved / not-achieved
>
> Future milestones projection

Problem Inventory

Root Cause Analysis of problems

Learning point Inventory, Clustering, Priorities

Legacy Inventory

Recommendations

Formulation of Results delivered and optional Request for Decharge

Actions

Final event: Drinks, dinner or other creative event

Typical Results

The DPE Post Project Evaluation has as main goal "Learning" for all persons involved.

Today most projects are formally closed with a delivery protocol. For most participants though, the Post Project Evaluation will form the closure of the project. The Evaluation workshops free-up energy for new starts. The result of the post project evaluation is insight from the workshops carried away by the participants and will be used for more effective future endeavors. The results are formally written down in an evaluation report that is delivered to the steering committee or the sponsor. Based on the evaluation results the sponsor or possible steering committee could discharges the project team, steering committee and others involved, if this is not already done as part of the delivery protocol.

Final result of the post project evaluation is the explicit formulation of the project legacy as organizational and cultural change project. There can be an action list for the organization or for other projects to manage the interdependencies. The project archive and all documents used during the evaluation will be formally handed over to company archiving.

Service Description

1. Preparation: Interview Sponsor and Project Manager
2. Delivery ½ or 1 day workshop(s)
3. Report writing
4. Recommendations writing based on DPE repository and Change Agenda.
5. Reporting
6. Personal Feedback to Sponsor and Project manager
7. Archiving depersonalized results in DPE repository

Organizational Check

Every project has organizational change aspects. Some projects are pure organizational change. The DPE project scan uses a well etablished "Change Agenda" as a check for completeness of integral change management. The Check of the Change Agenda will deliver advice for the change management aspects of future projects and for possible direct follow-up of the closed project.

Activities and Duration

+ Reading: design documents, Architecture, Audit reports, Workers Council correspondence etc. etc.
  ½ day to several days depending on complexity and evaluation goal
+ Interviews with project manager, Project leader(s) and Executive sponsor and stakeholders (could include Customers and workers council)
  ½ day per interview including feedback from and to interviewee
+ Workshops with project group, steering committee, user groups etc. Preparation, Delivery, Report and Recommendations writing
  3 days per workshop typical
+ Final Reporting
  1 day to several weeks
+ Total 3 - 6 days for a simple ½ - 1 day evaluation workshop
  Up to 50 workdays with up to 3 months elapse time for an extensive evaluation of a multi-million Euro not-successful complex project.

Appendix 1: Topics of an Evaluation

The list below is used to start discussions and help participants to think about possible topics of review.

1. Goals
2. Architecture: Design, Consistency, maintenance
   (Reference Architecture framework, e.g. HP ITSA, Tapscott or DSDM)
3. User Participation
4. Project management and Control
5. Involvement Top Management
6. Project / Line Interaction
7. Clear Project Organization / Project Structure
   Roles and Responsibilities Steering committee, Projectgroup etc
8. Budgeting and Budget control
9. Effective resources: Expertise, Capacity, Motivation
10. Organization Champ
11. Experience working in projects
12. Communication
13. Proven / non-proven instruments
14. Quality assurance
15. Going Concern management
16. Leadership should not be a "multi headed dragon"
17. Organization development synchronized
18. Workers Council involvement
19. Excess of faith: "everything will be OK eventually"
20. Technical (achievability)
21. Manage the "Grand Picture"
22. Expectations management
23. Management of attitude problems: "The ability to say NO" or the acceptance of possibility to fail
24. Interrelations with other projects
25. Do not throw money at the problem
26. Matching Leadership style and project phase
27. Problems in other projects are repeated
28. In case of abort: communicate, evaluate and learn
29. In case of success: Evaluate and learn
30. Change management
31. Organizational change check
32. Stop, Continue or Rescope recommendations

Appendix 2: The Project Timeline

Building up one or more project timeline(s) is one of the core elements in DPE. The timeline gives all participants involved insight in project dynamics.

The timeline is drawn on a couple of brown papers. Evaluation participants are invited to stick post-its with events on the timeline. High means positive, low negative events. The following discussion will show possible differences in perception about moment and about positive or negative placing. The discussion delivers an integral shared vision of the proceedings of the project including differences in perception. Next the group decides about milestones achieved and not achieved. Discussion will lead to insight about root causes behind milestones.

The project timeline exercise is typically followed by a learning point inventory.

Below a Schematic overview of timeline results.
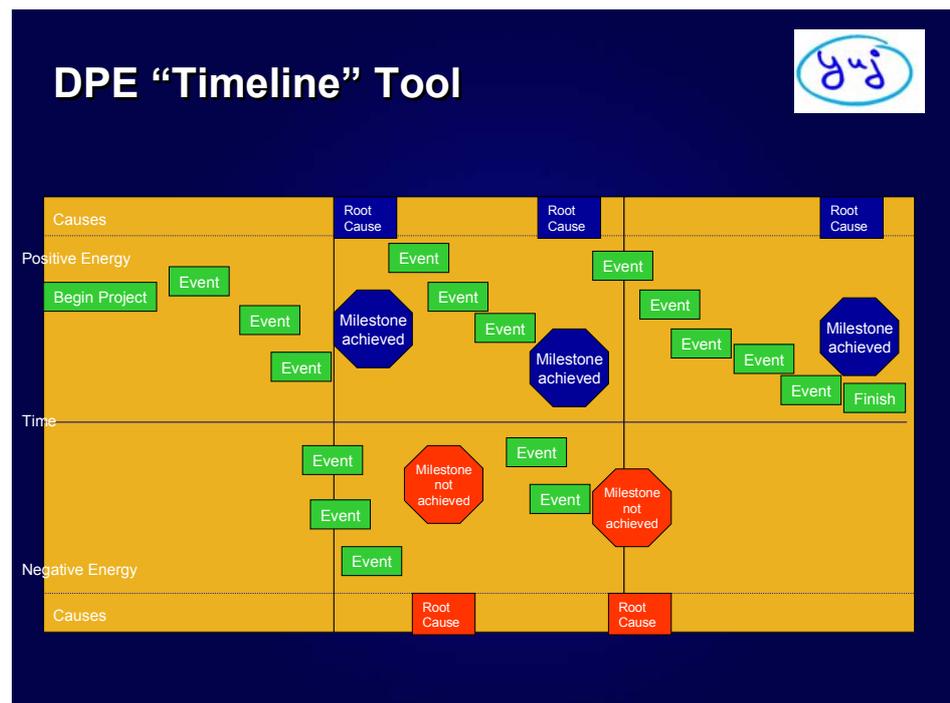
Yuj Advies bv

Yuj Advies is established in 2005 by René R. Tol. Before he started Yuj Advies in the Netherlands, René worked for 17 years as senior management consultant for digital (merged into Compaq and HP). That time he was responsible for delivery of top level consultancy engagements and for development an maintenance of the management consultancy competence.

In the 80's René worked as division manager for "de Baak" (Management Centre of VNO / NCW, the Dutch employers association). At "de Baak" he was responsible for programs as "Leading in the Information Society" and the first Information Management curriculum in the Netherlands.

Conversations with participants of "de Baak" programs made clear that there is a need for tools and methods to facilitate the discussion and decision making between the different flavours of management. CEO, CIO, CFO all have their specific language domain. Decision making about optimal strategies in the information society is often challenging. The Yuj Advies methods and tools are optimized to bridge the gap.

As is stated in the document above we often learn not enough and not fast enough to catch up with the increasing complexity and acceleration. This is why the Project Evaluation Service was developed.

Besides the management consultancy delivery work, René trained many consultants of organizations as KPMG, Twynstra, Visions etc. in methods, tools and the art of consulting.

For more information: www.yuj-advies.nl .

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