

Post-Planning Review Prevents Poor Project Performance

Before you work the plan, take the time to check your work. That “checkpoint” is the post-planning review, a proactive step that saves the time and money often spent reacting to problems.

by David Antonioni

PROJECT MANAGERS are usually encouraged to conduct evaluations of their project management processes at the closeout of projects. Although end-of-project evaluations are valuable, there is another approach that may contribute more to project success and at the same time improve the organization's overall project management practices. Post-planning project management review can be more effective at achieving both short- and long-term company goals.

Project Management Evaluations. Project management evaluations are usually conducted by project managers and their project team members at the end of the implementation phase or at the close of the project. An evaluation differs from a project status report because it addresses the entire project life cycle: conception, planning, implementation and closeout. Objectives are evaluated, budget comparisons are made, documentation is examined, and outstanding issues are identified, discussed and possibly resolved. An evaluation usually recognizes factors that contributed to the success or failure of the project. Some project managers also evaluate and complete performance appraisals for each team member based on the accountabilities established at the beginning of the project.

Project evaluations tend to be just what the name says —an evaluation—with the emphasis on feedback. Project evaluations may occur too late to do much good. Post-planning project reviews are recommended because they serve as forward information that can prevent problems during the project's implementation.

Post-Planning Project Management Reviews. A post-planning project review is conducted at the end of the planning phase by reviewers who are experienced professional project managers. Planning, as specified in this article, includes defining the problem to be solved, developing objectives, creating strategies for achieving objectives and constructing detailed work

plans to attain objectives. Unlike a status report, a post-planning project review is conducted by someone from outside the project, not from within the project team. Project managers receive direct customized feedback and support from highly qualified reviewers. The reviews are intended to help project managers and team members improve their project management skills through on-the-job feedback and coaching. The reviews can also provide senior management with information about organizational systems issues that may affect project management throughout the company.

Post-planning project reviews may also help reduce big-impact scope changes by ensuring that the planning process is done right. A project plan review is a proactive problem-prevention approach, while a project evaluation is a problem-detection approach. Therefore, post-planning project reviews should minimize the possibility that project scope changes might occur during the implementation phase by making sure that the project was well conceived and planned. This should significantly increase the likelihood that projects are on time, within budget and meet or exceed customers' expectations.

A Survey Assessing Project Management Evaluations and Post-Planning Reviews. Approximately 200 project managers attending courses run by the University of Wisconsin-Madison responded to a brief survey assessing the extent to which they conducted project management evaluations and when they conducted the evaluations.

The majority of these project managers worked on product development, engineering or information technology products.

The results of the survey indicate that only about half of the respondents conducted project management evaluations and that the majority of these evaluations were conducted after projects had been

completed. Post-planning project management reviews are rare. However, seven respondents indicated that post-planning reviews were more powerful in contributing to project success (on time, within budget) than evaluations conducted at the end of the project.

The most common format used by the respondents for conducting project management evaluations involved project team discussion facilitated by project leaders. One-on-one interviews, focus groups and questionnaires were less likely to be used. The evaluation data was primarily collected from team members and project managers, although in some cases customers, clients or end-users were included in the feedback processes.

Based on the results, it appears worthwhile to invest resources in conducting post-planning project reviews.

Establishing a Post-Planning Project Process. An organization needs to first develop a methodology or standard operating procedures for project management. The methodology provides a frame of reference for project managers and establishes guidelines to follow when reviews are conducted. Lessons learned from review can then be used to update project management methodology.

The organization should then form a project management advisory board consisting of a senior manager who champions projects, a project sponsor, the project management director, an experienced project manager, a resource manager and, ideally, a past internal or external customer of the organization's projects. The purpose of this board is to drive continuous improvement with the project management process within the organization.

Next, the board should select at least two experienced project managers who have good interpersonal skills as well as technical project management skills to

conduct post-planning project reviews. As reviewers, the managers need to be skilled at interviewing and listening, and must be prepared to teach and coach others. If experience project managers are not available, organizations can contract with a qualified consultant to conduct the reviews and teach project managers how to do the reviews.

Ideally, organizations should evaluate every project. However, because of limited resources, often only select projects may be reviewed. Some of the criteria used for selecting the projects include risk, financial impact (profitability), complexity of technology and client sensitivity. In some cases, a project manager's experience may determine the need for a review. A review team can help a project manager develop knowledge and skills at the same time that it increases the likelihood of project success.

What Occurs in Post-Planning Reviews. During the project review, all documents that should be part of the project plan are examined. This includes the business case, project charter, stakeholder expectations, management plans for scope, deliverable quality, schedule, risks, changes, issues, resources, communication, procurement and transition of deliverable ownership. In structured interviews, reviewers ask the project manager specific questions to assess the work completed in the initiating and planning phases of the project. Reviewers should prepare a list of standard questions, such as those listed near the end of this article. In addition, reviewers can also ask questions based on information they receive during the interviews.

The review data is summarized to point out strengths and areas for improvements. Reviewers can then make recommendations to help project managers adjust their plans and process. Lessons learned from the reviews should be sent to the project management advisory board so these lessons are used to update the organization's project management process. The organization's culture may affect reactions to the idea of sharing the lessons learned. In some situations, project managers may find it difficult to share information about their mistakes with others because of distrust about how the information will be used.

Employee Responses. Organizations will most likely experience some initial resistance to conducting project management reviews until benefits are experienced. Experienced project managers generally work the best as reviewers. However, these individuals may complain about the amount of time needed to conduct the reviews. Therefore, it is essential that the organizations commit staff and time to conduct the reviews. As mentioned before, some organizations hire a qualified consultant to conduct the reviews. As a guideline, it takes approximately one to two days to conduct a thorough review; therefore, the project managers involved must have time allocated to the review process. The organization should make sure the project managers are recognized and rewarded for their work as project reviewers.

Organizations should begin to experience benefits from the reviews after the first year. Project success rates should increase as project managers and team members learn to improve their thinking and planning for projects. Reviewers should also experience personal development from coaching others. As one project manager who conducts reviews said, "I have a better overall understanding of the project management process because I'm conducting these reviews."

It makes good sense to conduct a review at the end of the planning phase to order to prevent potential problems in the execution phase. However, conducting project planning reviews requires management to modify its mindset. It is a radical change for reviews to be conducted by experienced individuals from outside the project team. It is also a change to conduct this type of review before the end of the project. Management needs to pay heed to the axiom that proper planning prevents poor project performance. One of the benefits of reviews stems from a feedforward approach—the information can be used immediately on current projects.

For best results, both project reviews and evaluations should be done. Each provides opportunities to gather information useful for improving the organization's project management process, thus increasing the probability of project success and giving the organization a competitive advantage.

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