Troubled Projects – Rescue and Recovery is a facilitated discussion, rather than a slide-based presentation. We use our shared knowledge and experience – to build a shared view. The following preparation notes encompass the thoughts of the facilitator, Gail Mitchell.

What are key signs that a project is in trouble?

- People: uncontrolled or unpredicted growth of team size; constant overtime; team members are disengaged or discouraged.
- Schedule: no one knows when it will be finished or even when the next milestone is; target dates continuously change.
- Cost: either cost overruns or unknown cost.
- Quality: high defect rate; defect cycling; and lack of confidence in deliverables.
- Conflict: team conflict, especially as work is passed from one person to the next; conflict with the client; low trust; and the blame game.

So we've been brought in to a project that suffering like this. The team is working very hard, not getting anywhere and very frustrated. What are our first priorities?

- Understand and fix pain points;
- Improve morale ... give the team a win;
- First principles...confirm Charter & Objectives;
- Establish a clear project plan.

How is re-planning tougher than planning a new project?

Normally project planning is done with a small team of experts, who are excited about their new assignment and can focus on planning. When re-planning you have a large team with mixed skill sets; they're frustrated, exhausted, cynical, and demoralized. There is an entire team in place. It's usually appropriate to keep the team, rather than temporarily release them. Consider:

Planning	Re-planning
Easy to focus on thinking and planning.	The senior team is consumed with fighting fires and supporting junior team members. Planning takes second priority.
Clean page.	Thick clouds of fog abound. Can be tough to ask the right questions without appearing to be placing blame or highlighting mistakes. People are protective of themselves and each other.
There's no status quo, so there's nothing to protect.	Protect status quo…each person does what they think is the best thing to do, every day. That the sum of the effort is not good...with all that stress each team member is often more determined to stick to what they think is right.
Lower day-to-day cost	High burn rate ($ spent per day) increases the pressure to have a usable plan quickly.

How should we address these differences?

It's essential to allow the planning team to focus and not be consumed by day-to-day fire fighting...my preferred approach is:

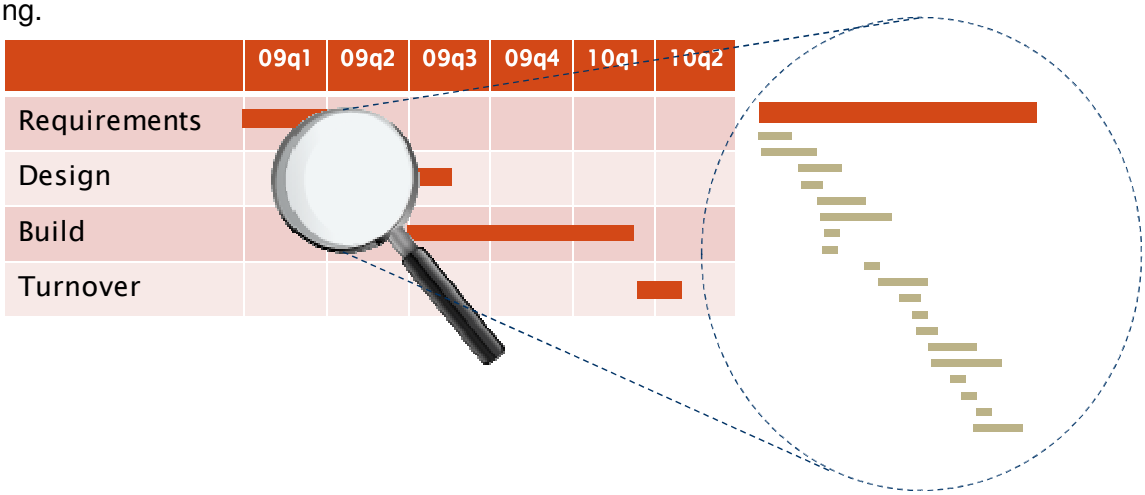
- Gather **information** from people & paper. Interview to understand work being done and where team members would like to help. Review key deliverables such as project plan, status reports, requirements, etc.
- Create a win for the team. Quickly create a mini or rolling-wave plan for a sub-set of **essential** and **achievable** project deliverables and milestones. Ask a mid-level leader (excluded from the recovery planning) to lead the project team to achieve this.
- **Deal with the exhaustion and stress**: ask the team to set a maximum work time for the next two weeks - say 40 or 45 hours a week. If they've been working 50+ hour weeks for more than 3 weeks, they've lost their productivity. Normalizing the work week is more productive than a forced one or two day break.
- Work on the larger picture: **re-plan** with a small team of leaders and experts. The re-planning team will work intensely and a lot of hours...it's crunch time for them.

The re-plan should address many of the items of a waterfall or step-based project recovery approach: clarity of the current situation; confirm alignment of scope with business objectives; address constraints; assess and address risks; make a commit-or-cancel decision, etc.

Don't try to achieve a comprehensive plan in a single step, instead:

- acknowledge blind spots;
- use progressive elaboration;
- define rolling-wave plans; and
- make rolling-wave commitments.

A rolling wave plan is an approach to project planning where you build only a high level plan for the whole project and only plan in detail for the next 2 months....as those 2 months complete, you now know so much more about the work to be done and the team's capability, so you plan the next 2 months. In a recovery, use rolling wave plans but make the timeframes shorter at the beginning.



With rolling wave commitments you acknowledge the full project timelines and budget constraints. As long as they appear reasonable, you commit to working the team towards them, as targets. As long as there are large unknowns, you do not commit to them.

solid planning data = commitment unknowns = target

It's important to get your best estimate on the big picture (and the level of risk), because you need to force a very **important management decision**: to continue with the current scope; tighten the focus; or cancel the project. We want to surface the inner dialogue everyone is having about the worthiness of the project. The **cancel or commit** dialogue happens with senior management AND it sets a tone for the whole team.

MS project file and a budget ≠ project plan
A project plan is a written document that addresses all of the PMBOK: Scope, Time, Cost, Communications, Quality, Risk, Procurement, and Human Resources. And for construction projects, add environment, safety, claims, and finance.

While we plan, how is the team progressing?

In parallel to the planning, the project team are working on deliverables...that progress will be very telling.

The deliverables were completed as planned and met target dates – celebrate and use as a base for momentum and stakeholder confidence; take up any learnings into your project plan as if a typical project control cycle.

There was some success, perhaps progress in some areas and not in others; perhaps slower than expected; perhaps disagreement on expected level of quality/completeness – still celebrate the progress to build momentum and confidence; harvest the learnings. It's a judgement call to integrate the learnings as part of your control cycle or to take it into your baseline plan...this is sticky territory and requires lots of listening to your team and stakeholders.

Difficult to identify any progress – This requires you to halt big picture planning ... you don't have a basis on which to plan. Your next steps likely include some tough conversations with the stakeholders; amending the project team with a few very trusted experts; a deeper assessment; etc.

After re-planning, what's next?

We have the usual project kick-off and execution activities. Your emphasis and focus differs.

Stakeholders: get their commitment to the project and what the team needs to be successful; be clear about your plan; make the risks visible.

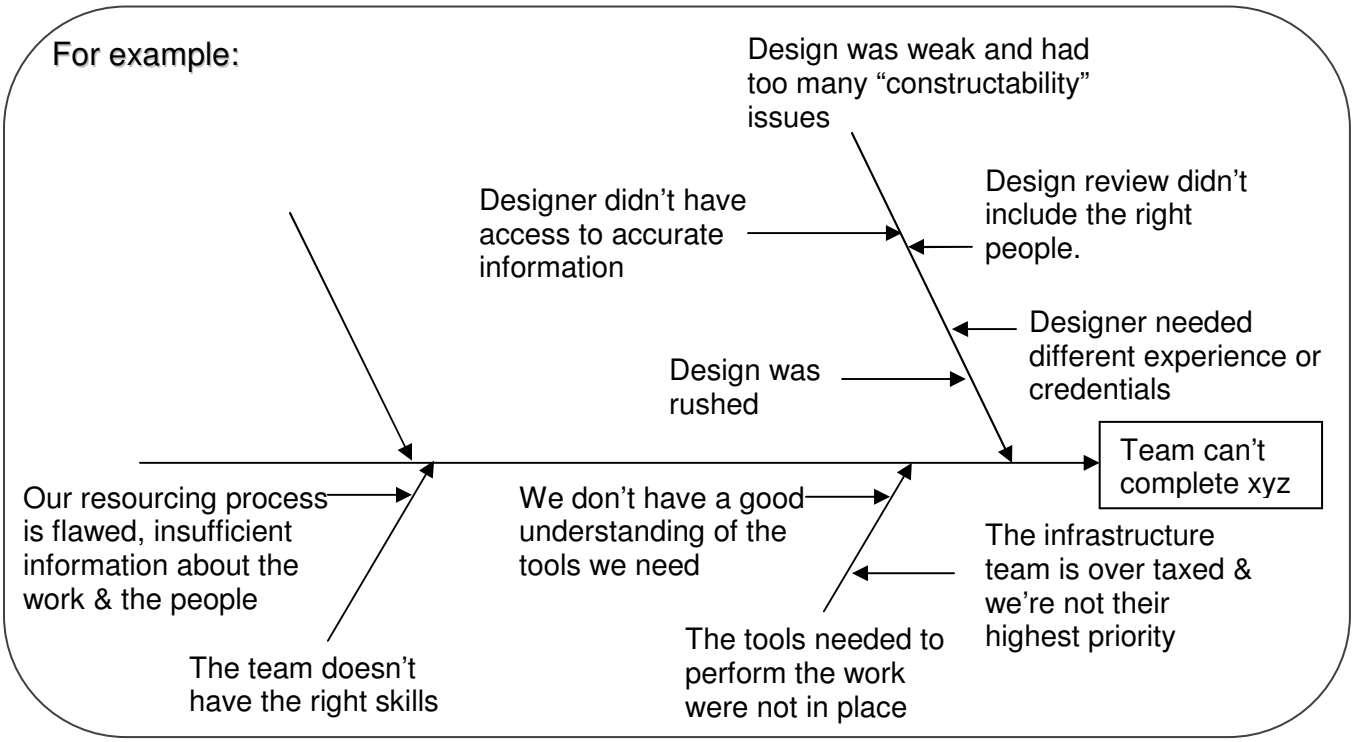
Team: celebrate successes; highlight demonstrated stakeholder commitment; communicate the plan; establish project norms;

You, the project manager: do your project control with daily detailed targets; celebrate every success; assess root cause for every delay; balance consensus building with benevolent dictatorship;

Root cause analysis...Ishikawa

This is a method to drive out the original source of a problem, rather than the symptoms of problems.

Start with brainstorming (green light approach) to get a large quantity and diversity of ideas. Organize them in a fishbone diagram...for each possible cause, consider what might be the cause of that.



Once you have a fully populated fishbone diagram, you need to narrow down the causes to implement a solution. In theory, this is done through data analysis, but in the IT sector, even a well controlled project seldom has the data to support data-driven decision making. Instead we use consensus, instinct and experience.

The Blame Game

Finger pointing and blame takes energy; creates conflict and fear; and keeps us from moving forward. How do we prevent it?

- Establish & communicate principles that can help..."Bad news doesn't come with blame";
- Agree to focus only on the future…not on water under the bridge;
- When problem solving, focus on the process, not people;
- Do team building.

When the project exists as a fee-for-service contract, someone needs to cover the cost of overruns to date – perhaps the customer, the service provider, or subcontractors. The apportioning of financial responsibility often happens at the same time as the recovery and can hinder recovery.

One solution is to build ½ a Chinese wall to separate the "business" necessity to apportion blame from the project necessity to get project results. Each company's "business" representatives should be excluded from all project meetings AND each company's project members should be excluded from the "business" meetings. Within their organization, they can (and will need to) talk with each other. The goal isn't to shield information, it's to shield tone and focus.

Reigning in communications chaos

When you don't know who should communicate with whom and people are frustrated, they start blasting communications...the project manager gets a few hundred email a day...add that to the work of re-planning, meeting for problem solving, etc. – it's impossible. How do we reduce email blasts and get the right communication?

- Define Roles and Responsibilities. R&R must recognize unique knowledge & skills of key team members...otherwise the documented R&R gets ignored.
- Define a simple communication plan based on who needs to know what. It should include who, what, when, how for necessary communications.
- Balance the modality, email is narrow – verbal is open. Keep the door open for verbal communication.
- Establish communications practices...effective use of subject lines, etc.
- Have a clear communication plan and make sure everyone is aware of it.

As the project progresses, address communication gaps and overloads.

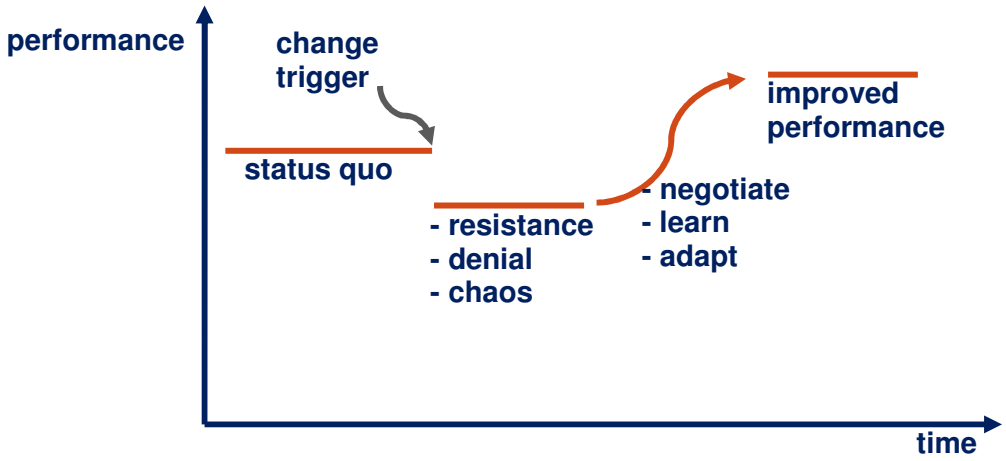
Dispersed Teams

Teams can be dispersed geographically; or sometimes we work in the same city but for different organizations and organizational silos. The differences in culture, terminology, language, time zones all add to the challenge. How can we overcome this?

- Travel to remote sites is a good practice but not always feasible. It may better to have some "away leads" come to your site to participate in the assessment & replan. It builds trust, relationship, shows respect and provides a long-term communication seed.
- Use technology to create virtual co-location.
- Find ways to create informal, one-on-one communications...MSN Messenger, one-on-one phone calls before and after conference calls to check for tone and how people are feeling.
- Make sure scheduled calls respect the time zones...and have balanced impacts on the team. A visual of the time zone difference with regular meetings marked in is a good reminder. You can make the time differences work for you not against you and get two work days in one calendar day.
- Put effort into team building including a code of conduct.
- Make individual schedules visible across the whole team.
- If you've a large group in one area and others dispersed consider making everyone call in to the meeting. This can create more respect for the challenges of communicating on conference calls and instil more considerate practices.
- Invest time to be clear about the meaning of a deliverable and what is expected. Where possible put team members from different cultures to jointly work on a deliverable.

Organizational Change

Project recoveries are a change to an organization, in this case, the project team.



Virginia Satir, a pioneer in family therapy, developed this change model in her practice. The model shows a group functioning at a status quo. When a change is triggered, expect a drop in group performance, caused by resistance, denial and chaos. With the right support, the group will negotiate, learn and adapt to an improved level of performance.

This model applies to any normal work environment, with any type of change. What happens when there's already chaos and despite everyone's hard work, the status quo is much lower productivity? It's tough to believe a team that's failing to deliver would resist help to improve. For are many reasons, they do.

Let's start with the executive sponsors. CHAOS research shows the most frequent cause of project failure is executive sponsorship. If you inherit this challenge, you'll find them unaware of their negative impact. Sometimes with the right leadership they respond quickly to provide productive support and oversight. Sometimes, they don't – they want the project fixed and they want to keep behaving the way they have. Because of the urgency, they continue with bad habits, only faster and more intensely.

We also experience rescue fatigue. For middle managers in the onslaught of the project, they see one of their peers or senior management create a failure situation. They may have rescued the company or that person many times by having their team jump to the moon. Now they're tired of rescue and they're protective of their teams and themselves (perhaps also motivated to teach a lesson).

Such projects also attract and grow the status of people who thrive on chaos. People who like the adrenaline, the recognition they get. It's addictive.

Several team members may have experienced significant jumps in responsibility. They're excited for the opportunity that brings and want to hold onto that.

Each team member has come to work each day working very hard to do what they believe is the right thing...so, while they may want other people to change, to make the project successful, they're still attached to their daily action.

There are many models for change including the ADKAR model:

- Awareness – why and "what's in it for me?"
- Desire – willing to support and engage in the change
- Knowledge – know how to change
- Ability – demonstrated capability
- Reinforcement – sustain the change

You've got to be cognizant of change resistance and accommodate the team's needs. At a minimum communicate the following for team members:

- Why?
- What's in it for me?
- What do I do differently on Monday?
- What won't change?

Close

In 20 years of performing recoveries of unique projects and programs, I've taken unique approaches to the recovery path of each. Recovery is always urgent and within that urgency there are three key areas: clarity, confidence and momentum. Recovery is an organizational change. Therefore it's a process that reveals itself and responds over time. Thank you.

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