

Ally News

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FROM THE PRESIDENT

Michael B. Bender



This month we conclude the 3-part series on project management metrics. In this article, I address how to use your change management system to identify root cause of project issues for continuous improvement.

The contents of this series was derived from my most recent book, *A Manager's Guide to Project Management*, now available in book stores and on-line.

We hope you enjoy this newsletter. Please feel free to offer comments and suggestions at your convenience through our web site: www.AllyBusiness.com.

... AND SO, I TWEET

Michael B. Bender

So, in my last newsletter, I indicated that I refused to tweet. I explained that I don't promote unsubstantiated soundbites and the 140 character format doesn't allow me to explain my statements.

Fortunately, I also reserved the right to change my mind, not regarding sound bites, but regarding Twitter. While leading a seminar a few weeks ago, an attendee indicated that he likes Twitter to issue announcements and quick information to his team. That made sense to me. So, my social networking continues.

I'm still reserving Facebook for only close friends and immediate family, but I now think I've rounded out my professional social networking links. Here they are.

Staying in Touch

You can now find me in LinkedIn at <http://www.linkedin.com/in/mbender-ally>. I still conduct research on LinkedIn by posting questions on leadership, project and process management, and other relevant topics. Please feel free to follow and join in. I've linked my blog to LinkedIn so you can follow it there as well.

My blog can be found at <http://mbenderblog.allybusiness.com>.

My twitter user id is *MBBender* (letter case is irrelevant, at least as far as I can determine). I've linked my blog to twitter, so you'll receive notices when I post an entry. My research indicates that the interconnect between twitter and LinkedIn isn't working. When it is, I'll interconnect those as well. I'll also pass along other news on twitter, such as seminar and speech announcements, major industry news, etc.

FEATURED TOPIC: PROJECT METRICS PART III: USING CHANGE MANAGEMENT TO IDENTIFY PROBLEMS

Change Management as a Monitoring Tool

Project change management is primarily a control and monitoring tool. As a control tool, change management reduces scope creep by only allowing valuable changes into the project. It also allows the project team to adjust schedule and cost appropriately.

As a monitoring tool, the project manager can track changes within a project to identify and address technical as well as project management issues.

*WHEN WE ROLL THESE UP
ACROSS MULTIPLE PROJECTS,
WE CAN IDENTIFY BOTH
PROCEDURAL AND CULTURAL
ISSUES.*

I once took over a project that was in trouble, where the previous project manager left in disgrace. I asked the team to show me the project change forms and the change log. They indicated they didn't have any forms (which I discovered was one of the root causes of the problem), but the previous project manager did keep a change log. The log was unsophisticated - simply a list of change requests, hand-written on loose-leaf paper in a 3-ring binder. I found entries written in crayon (really). The crayon entries didn't bother me or slow me down - the problem with this project jumped right off the page. We had a client who was out of control. The page was full of client-requested changes, most of which were never implemented - primarily because they fell through the cracks.

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The root cause was a project manager who was trying too hard to please the client. He'd accept change requests and try to do them. Soon, they came so fast, he couldn't keep up and lost control of the project. Had he completed the standard change control forms, it would have forced him to confront the cost and schedule impact of the changes which may have saved the project.

Change Management as a Cultural Metric

This project manager was not alone. The organization was so focused on making their clients happy that they neglected to control their projects. Interestingly, the result was very unhappy clients.

While I could save this project, executive management had to address the cultural problem - a concept they found very difficult.

Change Management is the Gatekeeper for Project Scope

The change management process is a gatekeeper: a filter. It is designed to allow good and beneficial changes to pass through to the project and prevent bad and non-beneficial changes from affecting the project.

In addition to just capturing scope change requests, you should identify the cause for the change. These might include: environmental change, incomplete client interviews, client who doesn't know what they want, poor requirements gathering procedures, etc.

Carefully categorizing and tracking the causes for change will help you improve your procedures.

Change Management as a Problem Identification Tool

Change management also serves to identify problems. If, for example, the project team failed to identify a set of requirements, the remedies would ultimately appear as change requests. Similarly, if the systems design was faulty, changes might appear during system build or integration. In any case, change requests would be issued.

Quality Control is the Gatekeeper of Project Quality

Recall that quality assurance reviews the project team's work against the procedures. Also recall that quality control reviews the products of the work against the requirements. As either Q/A or Q/C identify problems, these ultimately result in change requests run through the change management system.

The Change Management Database

Ultimately, all problems, technical, procedural, or human, end up in the change management system. You only need categorize these to capture areas for improvement. Ideally an organization that oversees all of project management (such as a PMO) should define these categories.

*CHANGE MANAGEMENT IS
THE REPOSITORY FOR ALL
ISSUES.*

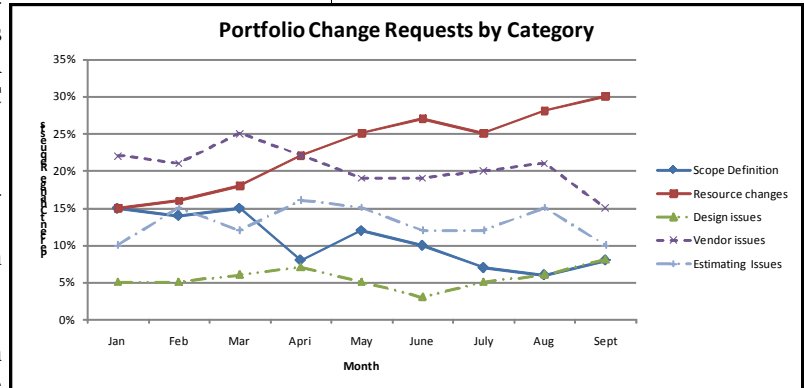
Methodology Improvement Metrics

Our objective in this article is to identify areas to improve project management in the organization, not necessarily specific projects, although the same techniques were well for both situations.

The PMO, therefore, should identify the key areas to catalogue changes in projects within its purview. By doing this, all project managers will catalogue their change requests the same way, allowing the PMO to roll-up the metrics across the organization. This will result in two graphs identified beyond.

Change Requests by Category

This is a trend graph that shows whether the number or impact of changes is improving or worsening across the organization. A sample graph is shown below.



Note that while most change requests are improving (reducing), one is increasing. This helps the PMO identify where it should focus to improve the methodology or culture.

Change Request Pareto Chart

The second chart plots either the count or impact of changes in depending order as a bar chart. Then, plot the cumulative effects of those changes in a line graph as shown below.

This is a classic pareto chart which identifies which issues to confront first. You can plot either the count or effect (in time or cost) the changes cause to as you wish.

You now have clear direction to improve project management.

