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100Q

Project Retrospectives

100Q™

Assessment Instrument

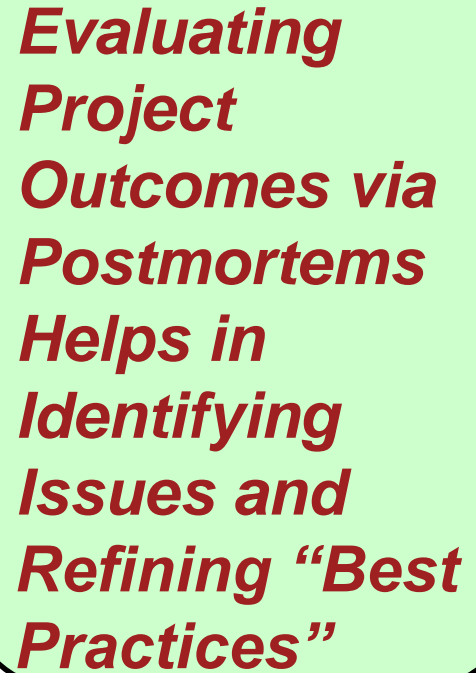
Project Retrospectives

Project Postmortems Help Us Transform



- ❑ Continuous Learning from Mistakes
- ❑ Continuous Improvement via Systemic Changes
- ❑ Refine “Best Practices” Over Time
- ❑ Improve Project Team Performance
- ❑ Bolster Organizational Success
- ❑ Done Right, Everyone Wins
- ❑ Proactive Strategic Project Management

**To be Truly
“Strategic” about
Project
Management You
should
Institutionalize
“Postmortems”!**



Project Postmortems: Retrospectives

What are They and Why are They Important?



- ❑ Definition of **Project Postmortem**
 - A **Retrospective** (20/20 hind-sight) Evaluation of Completed Project(s)
 - Builds off **Factual/Objective Outcomes and Data**
 - Conducted to:
 - Assess Both *Good & Bad Performance*
 - Determine *Root Cause of Issues* that Impacted Project Performance
 - Develop *Systemic Corrective Action Plans* for Benefit of Future Projects
 - *Implement Systemic Changes* to Institutionalize their Adherence
- ❑ **Should NOT be a “Witch Hunt”** – Assigning Blame Defeats the Process
- ❑ Should **Pro-Actively Prevent Re-Occurrence of Issues** which Caused Poor Execution – i.e., **Reduces Risk on Future Projects**
 - **Refine PM Best Practices** – Tools, Processes & PM Competencies
 - Establish **Systemic Changes** – Don’t Just List Them in an Archive Folder

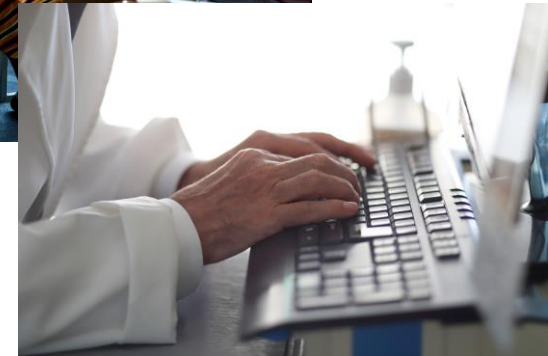
Project Postmortem Methodologies

- ❑ Postmortems can be **Implemented in Several Ways**

- As a *Project Team Requirement*
- *Special Request* by Management or Customer
- As an *Analysis or Questionnaire*

- ❑ **Typical Postmortem Methodology**

- Collect the *Facts*
- Assess the underlying *Issues*
- Develop *Action Plans* to Address Systemic Issues
- Implement *Systemic Changes*



- ❑ Normally, **Technical** Lessons Learned are Addressed Immediately

- ❑ **Management Related** Lessons Learned are **Sometimes Ignored**

Best Process for Retrospectives

Ideally - Efficient and Effective



❑ Effectiveness Goals:

- *Objective* versus Subjective
- Maximize Use of *Data that is Factual & Relevant*
- Ensure *ALL Potential Causes* of Unsuccessful Execution are Assessed
- Assess *BOTH Good and Bad* Performance
- *Ease the “Witch Hunt” Concerns*
- *Consistent Evaluations*
- Valid *Systemic Corrective Actions*

❑ Efficiency Goals:

- *Minimize the Complexity* of the Guidelines
- *Minimize the Amount of Time* to Obtain Results
- *Minimize the Expense*

The Anonymous Survey Approach

An Efficient and Effective Methodology



□ Design & Use a PM Questionnaire

➤ Pros:

- ***Least: Complex, Time-Consuming, & Costly***
- Ensures ***Consistency***
- Addresses ***all Relevant Issues***
- Collects Info on ***Both Good and Bad*** Performance

➤ Cons:

- Does not Ease “Witch Hunt” Concern Altogether
- Does not Necessarily Ensure Honest Assessments

Q No.	Question Topic	Ans. No. 1	Ans. No. 2	Ans. No. 3	Ans. No. 4	Ans. No. 5	0-4 Score	Rating
Answers' Numeric Value:		0	1	2	3	4		
57	Meeting Schedule Commit	1	2	3	1	0	1.6	
58	Meeting Project Cost Commit	1	2	4	0	0	1.4	
59	Meeting Product Cost Commit	0	1	2	4	0	2.4	
60	Meeting Product Technical Performance Requirements	0	0	3	4	0	2.6	
61	Meeting Product Quality Requirements	0	1	2	4	0	2.4	
62	Customer Satisfaction Level	0	3	0	2	1	2.2	
63	Internal Management Satisfaction Level	0	3	1	2	1	2.1	
65	Team's Agility	0	0	1	3	3	3.3	
65	Team's Team-work	0	1	1	2	3	3.0	
65	Team's Enthusiasm	0	1	1	4	1	2.7	

Answer Key:		Distribution
No. 1	Very Poor Performance	2.9%
No. 2	Less than Satisfactory Performance	20.3%
No. 3	Satisfactory Performance	26.1%
No. 4	Good Performance	37.7%
No. 5	Very Good Performance	13.0%

Legend for Ratings versus Scores		
Good		2.5-4.0
Average		2.0-2.4
Concern		1.5-1.9
Issue		0.0-1.4

□ Augmentations Considered:

- Survey ***Several “Like” Projects*** at the Same Time
- Consider Additional ***Inputs from Other Involved Stakeholders***

□ Solves the Concern: How to Determine ALL Issues are Accounted for



Postmortem – Case Studies*

7 Similar Projects

STRATEGIC PROJECT MANAGEMENT

*Published in “Project Risk Management: A Practical Implementation Approach”, by Michael M. Bissonette, ©2016 PMI®, Inc.

Survey Objectives

7 Similar Projects



- ❑ **Collect Data** Regarding how Project was Managed
 - Tools & Techniques Used
 - Planning
 - Communication
 - Managing & Controlling
- ❑ **Assess Perceptions from PMs (7)**
 - Overall *Outcomes*
 - Specifically Assess *Effectiveness of Tools & Techniques*
- ❑ Understand **Issues Encountered** and Perspectives of Performance
- ❑ Determine Recommended **Systemic Corrective Actions**

Case Study – 7 Similar Projects

Numbered by Survey Question Number



Relevant Project Profile Data:

- 3. Shows PM transitions - only 2 from start to finish
- 4. Total durations between 9mo. to 43mo. (median: 19mo.)
- 11. Customer priorities/expectations – Q(Technical), project cost, schedule, product cost
- 12. All PMs are primary POCs (Points of Contact)
- 16. Internal priorities/expectations – Q(Technical)/schedule, project cost, product cost
- 18. 6 of 7 >\$5M Total Budget
- 19. All Complex/Risky Product Development Projects
- 20. All with Aggressive Schedules
- 21. Most requirements (6 of 7) negotiated prior to contract award
- 22. Some open-ended requirements
- 25. Tacit Assumption was that team could trade off scope if necessary
- 26. Firm project cost budgets on 6 of 7
- 31. Only 1 FFP (Firm Fixed Price) contract

Case Study – 7 Similar Projects

PM Tools & Techniques Used



PM Tools & Techniques:

- 33. 4 of 7 EVM (Earned Value Management) – the rest were Actual/Planned Costs vs. Time
- 36. All 7 used IMS (Integrated Master Schedule) Lite Scheduling (i.e., no resource loading)
- 39. Product costs estimated using primarily “bottom-up” process
- 41. Projects budgeted using “bottom-up” process
- 43. Projects scheduled using “bottom-up” process
- 46. Half used formal risk management – the other half used informal (reactive)
- 49. Several Quality tools used – were mostly considered informal / reactive
- 51. Requirements Management was inconsistently applied and lacking in General
- 53. Not all had PMP (PM Plan) or SOW (Statement of Work), but 5 of 7 did

Ratings of Outcomes

7 Similar Development Projects



Q No.	Question Topic	Ans. No. 1	Ans. No. 2	Ans. No. 3	Ans. No. 4	Ans. No. 5	0-4 Score	Rating
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Performance Assessment Ratings

7 Similar Development Projects



Q No.	Question Topic	Ans. No. 1	Ans. No. 2	Ans. No. 3	Ans. No. 4	Ans. No. 5	0-4 Score	Rating
	Answers' Numeric Value:	0	1	2	3	4		
66	Plan: Scope Completeness	1	3	1	1	1	1.7	
67	Plan: Assumptions	0	2	4	1	0	1.9	
68	Plan: Bases of Estimates (BOEs) for Project Costs	2	4	1	0	0	0.9	
69	Plan: BOEs for Product Costs	0	2	4	0	1	2.0	
70	Plan: BOEs for Project Schedule	0	6	1	0	0	1.1	
71	Plan: BOEs for Product Performance Margins	0	2	3	1	1	2.1	
72	Plan: Contingency Planning	1	4	2	0	0	1.1	
73	Management Controls: Cost and Schedule	0	4	1	2	0	1.7	
74	Management Controls: Risk Management	0	3	2	2	0	1.9	
75	Management Controls: Reuirements Management	0	3	1	2	1	2.1	
76	Management Controls: Requirements Validation	0	2	3	2	0	2.0	
77	Management Controls: Trade-Off Analysis	0	1	3	2	1	2.4	
78	Management Controls: In General	0	2	2	3	0	2.1	
79	Communications: Understanding Priorities	0	1	3	2	1	2.4	
80	Communications: Project Status	1	0	2	4	0	2.3	
81	Communications: Direction to Team and Organization	1	0	3	2	1	2.3	
82	Communications: Escalating Issues	1	0	1	3	2	2.7	
83	Communications: Decision Making	0	1	2	3	1	2.6	
84	Team's Ability to Perform	0	3	1	2	1	2.1	
85	Team Dynamics	0	0	3	2	2	2.9	
86	Company Dynamics	0	3	1	2	1	2.1	
87	Team Proximity versus Performance	1	2	0	3	1	2.1	
88	Fairness of Customer and Management Expectations	0	2	2	3	0	2.1	
89	Resources: Adequacy of Funding at Kickoff	0	4	3	0	0	1.4	
90	Resources: Adequacy of Schedule at Kickoff	0	5	2	0	0	1.3	
91	Resources: Adequacy of Facilities	0	1	1	4	1	2.7	
92	Resources: Team Member Capability	0	1	2	4	0	2.4	
93	Resources: Team Member Capacity	1	2	4	0	0	1.4	
94	Development Process Employed	2	1	1	3	0	1.7	
96	Development Process Adherence	0	3	1	3	0	2.0	
97	Productivity Tools Used	1	4	1	1	0	1.3	
99	Infrastructure Tools Used	0	3	2	2	0	1.9	
101	Training regarding Use of Tools	1	2	3	1	0	1.6	

Legend for Ratings versus Scores		
Good		2.5-4.0
Average		2.0-2.4
Concern		1.5-1.9
Issue		0.0-1.4

Answer Key:		Distribution
No. 1	Very Poor Performance	5.6%
No. 2	Less than Satisfactory Performance	32.9%
No. 3	Satisfactory Performance	28.6%
No. 4	Good Performance	26.0%
No. 5	Very Good Performance	6.9%

Performance Ratings Graphic

Specific “Red” Ratings



Observations

Issues Identified by this Analysis



- ❑ Project Cost & Schedule Estimation Accuracy Issues – and Commitments were too Aggressive
- ❑ Scope Omissions (or Requirements Management?) a Prevalent Issue
- ❑ Better Product Development Process Design up Front is Needed
- ❑ Poor Contingency Planning, in General
- ❑ Inadequate Requirements Management
- ❑ Inadequate Risk Management, in General
- ❑ Inadequate Cost/Schedule Controls given Commitment Expectations
- ❑ Insufficient Functional Management Support of Programs
- ❑ Physically Dispersed Teams have more Issues than those that are Not
- ❑ New Product Cost Estimating is Marginal
- ❑ Gaps in Productivity & Infrastructure Tools and Training
- ❑ Gaps in PM Capabilities

Resulting Corrective Actions

“Bought-Into and Embraced”



Area of Concern		Recommended Corrective Actions	
1	Project Planning	A	Evaluate Bid Categories vs. Job Groups and Salaries to ensure representative hour rates are being estimated.
		B	Evaluate and refine Project Cost and Schedule Estimation Processes (i.e., Check & Balance Decision Matrix for Buy-in, Requirements Cross-Checking, Scope Completeness, Assumption Validations, Definitions of Task Completions, Risk Assessments, etc.).
2	Product Development Processes	A	Institutionalize a Systematic Approach to Establishment of the Relevant Product Development Processes to Satisfy Program / Project Requirements (i.e., a Check-List of Items to Include during the Planning Process).
		B	Consider a Generic / Tailorable Template for Various Types of Product Developments.
3	Project Management Consistency	A	Establish a PM Counsel to: Continually Review and Refine PM Practices; and Establish Improvement Initiatives and Action Plans for Completion.
		B	Establish Standard PM Status Review Templates for both Critical Programs that are Part of Monthly Executive Review, and other Programs/Projects that are Reviewed at the BA and Engineering Management Level.
4	Productivity & Infrastructure Tools -- Lean Process Implementation	A	Assess Productivity Tools Used by Various Teams and Determine what makes Sense to Standardize and how we ensure Users are Adequately Trained.
		B	Assess Infrastructure Tools that could better support PM and Determine what makes Sense to Standardize and how we ensure Users are Adequately Equipped to Use.
		C	Establish a Systematic Approach to Collecting Program / Project Cost and Schedule Performance Data (i.e., WBS Design, Database) for better Analogous BOEs.
5	PM Capabilities	A	Establish a Standard PM Assessment Process.

Postmortem Cautions

Retrospectives Warrant Careful Thought



- ❑ **Were ALL Relevant Facts Brought Forward?**
 - *Many Issues can Contribute* to Unsuccessful Execution
 - Sometimes We *Tend to Omit some Facts*
- ❑ **Was “Root Cause” Actually Determined?**
 - Root Causes are *Sometimes Very Difficult to Determine*
 - *Symptoms are Sometimes Confused as Root Causes*
 - *Fixing the Symptom doesn’t Usually Fix the Systemic Issue*
 - Consider Tried & Proven Problem-Solving Tools
- ❑ **How do we Know Corrective Actions will be Effective?**
 - *Logical Rationale – consider Playing it Back to see if the Issue could have been Avoided*
 - *Measure / Monitor Future Projects*

Get Started

Implement Your Own Project Retrospective(s)



□ Getting Started is Really Easy:

- Go to **RTConfidence.com**
- Go to the “**RTConfidence Learning Center**” page
- Request a SurveyMonkey 100Q Assessment
- The RTConfidence provide other directions as required
- If You Want Just the Basic Service (Completely Automated), RTConfidence will Compile and Send a Set of Charts (like those on slides 12, 13 and 14 within this deck) and Forward them to You

□ Our Project Scientists can Help as Well

- We can Help you Filter the Data
- We can Help you Compile a More Detailed Report
- Find out About Consulting Rates on the RTConfidence Website

Our Books Document this Process

Please go to RTConfidence.com for More Info

