Review Process

PROCESS SUMMARY

Purpose of Reviews

Any important (defined by its relative scale, risk, experience, potential for leverage in terms of strategic intellectual property development or skill development) activity of the firm can and should be regularly reviewed by top executives in order for:

- Its leaders to step back from the press of day-to-day and pull together a consolidated picture of what they are doing at a higher level in order to share with others in a safe environment to challenge thinking and to provide advice and counsel on strategy, focus, next steps, and to offer guidance, ideas, and resources that should be brought to bear.

- Executives to stay in touch with what is going on with front-line activity. Any important activity (e.g., sales bids, projects, products, market areas, strategic initiatives, etc.) can and should be reviewed regularly to keep management informed about what is going on and for them to efficiently provide guidance and direction, consolidate insights across activities, drive cross-sharing of resources, insights, and ideas in the best interest's of the firm.

Management sets the tone for reviews to ensure that they serve their intended purpose and that they are not done just for the sake of it or become a game of "show and tell". Reviewers must make it safe for those whose work is being discussed to embrace the process and seek input from participants because what is being reviewed ***is*** the business. Reviewing it is an efficient and smart way to keep close to what is really going on. This means reviewers must not look to find fault or assign blame. Instead, they must strive to understand what is really going on and to find the best way to improve performance and learn the most.

Reviews also:

- Provide visibility for key staff,
- Create high-stakes circumstances that push up performance,
- Create a forum for executives to model the behavior they want others to emulate, and
- Reveal important lessons and insights to share with other teams and initiatives.

Schedule

Reviews should be scheduled in accordance with major milestone, including at least the following:

- Kickoff Review – within 2-3 weeks of the start

- Progress Review – when necessary, as determined by the PM, CTO, or COO based on key milestones

- Close-out Review – shortly after work is completed

Steps

1. Compile/assign the review team. It is best to have the same reviewers at each review for continuity, consistency and efficiency. Others can be invited for special needs. A core of reviewers should come every time. Review teams need to include some combination of the following people (many of whom may be the same person):

    a. Project Manager (PM) or the leader of what is being reviewed

    b. PM's supervisor or area leader

    c. Client Relationship Manager

    d. Account development leader

    e. Product manager

    f. Technical Lead on this engagement

    g. Functional Lead on this engagement

    h. Outside technical leader

    i. Outside functional leader

    j. Outside financial leader (e.g., CFO or other senior executive to provide critical thinking in terms of contractual and financial matters)

    k. Subject matter experts

    l. Executive sponsor (i.e., the top executive who will monitor closely this work to know what is going on and be sure the right things are happening)

    m. Team leaders and team members as needed and as appropriate

    n. Facilitator (makes sure everyone behaves, participates, keeps things moving)

    o. Administrative support (arrange logistics, mechanics, schedules, supplies, equipment, etc.)

    p. Knowledge agent who brings relevant corporate knowledge to the review, looks for additions to corporate knowledge from the review, and leads the capture and dissemination of key points and action items collected during the review

2. The PM and their supervisor lay out a schedule of reviews that is approved by the COO or designee.

3. An administrative support person tracks reviews performed as well as those that are scheduled, upcoming, pending, and that need to be scheduled. The administrative support person in charge of reviews regularly provides the SCM with a record of upcoming reviews and projects for which a review may need to be scheduled

4. For those that need to occur but that haven't happened according to the pre-arranged schedule, an SCM leader reminds the PM that it is time for a review of their project and advises him/her to work with the administrative support person in charge of reviews to schedule

5. The project manager informs the review team that it is time for a review and sets out to schedule at an appropriate time, coordinating with the PM's supervisor.

6. PM completes Review Background (based on the Review Background template and following the instructions below) and sends the completed review template to the review team **two** workdays prior to the review.

7. PM identifies and invites any special guests that are required to report on prior actions or who are appropriate for the content to be discussed.

8. The PM's supervisor, or designee, facilitates the review. The knowledge agent captures decisions and their rationale, action items, key insights, and process feedback.

9. The action items list created during the meeting includes who is supposed to complete the action and its due date. The PM is responsible for making sure that action items are recorded, distributed and fully addressed, regardless of the assigned party, and the PM's supervisor follows up to be sure it does.

10. The PM reviews the meeting summary, and distributes it to meeting attendees within two days following the review.

CRITERIA FOR A SUCCESSFUL REVIEW

Reviews are successful when:

1. The PM and the project team feel:

    a. They have successfully stepped back from the press of the usual day-to-day to pull together what they are doing into a consolidated whole and shared it with a team of supportive professionals who themselves have reviewed advance materials, showed up, paid attention, participated and supported the team by challenging its thinking, offering best advice, and providing access to outside resources that can be helpful (such as written materials, people, training, and time that will help improve performance), and

    b. That the preparation process, the review meeting itself and the follow up will help them achieve project objectives better, faster, and more efficiently.

2. Management is enlightened with respect to what was reviewed; specifically, what is working, what is not, and what needs to be done and learned as a result

3. The company's best ideas, thinking, resources, and skills have been brought to bear.

4. Participants feel:

    a. Enlightened, engaged, heard, and respected

    b. Appropriate next steps have been lined up in reaction to the realities and understanding reached.

5. The PM understands and internalizes:
    a. The group's best thinking in terms of what can be done to most improve performance and/or lower risk and is committed to making that happen
    b. The top three actions necessary to follow through
    c. What others specifically will do to support these efforts.

6. An open discussion of an engagement's status leads to the fertilization of ideas across projects.

7. Senior executives can collaborate and support the PM on front line work.

GROUND RULES

1. Show up on time, adequately prepared, physically and mentally present.

2. Avoid too much history and storytelling. Focus on understanding what is going on and related risks and mitigation strategies.

3. No one dominates.

4. Seek first to understand, be insightful and supportive and "work the point, not the person".

5. Pay attention to, and deal with, the real issues. Avoid seeing only what you want to see.

6. Summarize items learned so they can be reused elsewhere.

7. Praise the good things going on.

8. Keep sensitive matters in the room.

Project Review Agenda – Template

Purpose

- Identify and mitigate risks that the project will not be completed with excellence, to specification, on-time, and in budget.

- Ensure that the project is being done as well as the Company (not just the project team) knows how to do it, by efficiently applying our collective competencies, skills, and talents to it.

- Ensure that the project team is on track to extend and expand the project and positioning the Company to take on other engagements within the same account.

- Review and adjust internal best practices based on project experience.

Target Outcomes

A common understanding of:

- Progress on actions identified in prior reviews
- Performance objectives, including: deliverables, staff, resource usage, and client satisfaction
- Stakeholder management strategy

Identification of:

- Risks, and their relative probability of occurring and severity if they do, and mitigation strategy
- Next steps for the project team, and others who will be assisting
- Key lessons learned

Agenda

1. Review what this project is to accomplish.

2. Review how we are going about accomplishing it (project schedule, team architecture, work assignments, deliverables schedule), what is done, what we've learned, and what is next. Review earned value and other project metrics.

3. Discuss how things are going. Identify and discuss major risks. Determine and assign responsibility for mitigation strategies or contingency plans.

4. Make sure the team architecture (organization of people and their relative roles) is clear, and determine how it can be upgraded to make the project team more successful.

5. Review who is to talk with which client stakeholders about what. Discuss what client feedback has been received and how we are responding to it.

6. Discuss prospects and plans for extending and expanding this engagement, and for new growth in this client.

Review Background – Instructions

Summary

Client:	[Client Name]
Engagement:	[Project or Engagement Name]
Planned Dates:	[1/2/03] - [2/3/04]
Review Milestone:	[Milestone or situation that caused us to review the project]

Vision

Describe:

- Problem/Opportunity (what the client is trying to do)
- Solution (what the solution is, and what our part in it is)
- Success Criteria (what the client considers success)
- Deliverables (what we are handing over to the client)

This can come directly from the project's Vision statement, or a previous Review Background document. It need only be updated if it doesn't still reflect our best understanding of the project's vision.

Schedule Overview

Iteration	Contents	Start	End	Work
[E1]	• [Cluster of functionality or value]	[1/2/03]	[1/2/03]	[100h]
Total		**[1/2/03]**	**[1/2/03]**	**[500h]**

Provide an overview of the software development plan at an iteration level. If the involves only maintenance, operations, or other small projects, describe the nature of the work and what sorts of major accomplishments we have shown recently.

Project Team Organization Structure

Role	Name	Specific Responsibility	Utilization
Program Manager			
Account Manager			
Lead Developer			
Developer			
Test			
Deployment			

List all of the members of project team, and add any additional notes about exactly what their responsibilities are. Also describe the meetings and other communications mechanisms that the team has, drawing on the project communications plan.

Risks/Issues

	Risk	Impact	Mitigation/Contingency
1			
2			

3			

What are the top three project risks/issues that have a high likelihood of occurring and a significant impact if they do occur? What are we doing to mitigate these issues/risks? Do we have a plan in place for what we will do if these issues don't improve, or risks materialize?

Use the following topics as a guide of possible issues. Recognize that this is not a comprehensive list:

- team satisfaction – how is team morale?
- client satisfaction – what do we know about how satisfied the client is? If we don't know anything, why not?
- resource availability - is the staffed appropriately?
- methodology and technology issues - has your team done this type of work before?
- contract issues – is the structure of the contract putting the project at risk?

Relationship Matrix

Key Client Personnel	Make, Block, Let	Intwine Contact	Relationship Status	Comments
[Executive]				
[Project Manager]				
[Technical]				
[Other]				

List key client personnel and describe who on the Intwine project team is responsible for maintaining the relationship with them. For each person, include:

- Make/Block/Let: 1/ Enter one of the following letters to indicate the client's role in achieving initiatives:
  - M – Actively cooperate.
  - B – Actively uncooperative
  - L – Passive/Neutral
  - D – Don't know
- Enter name of the Intwine consultant accountable for developing a positive working relationship with this client.
- Enter one of the following symbols to indicate the status of the relationship between they consultant listed and the client listed:
  - + → strong relationship
  - o → neutral relationship
  - - → poor relationship
- Comments for any relationship noted as a Block, and any additional comments as desired.

Also describe what mechanisms we have in place for gathering feedback from each of these stakeholders, and what kind of feedback we have received.

Strategy for Project/Opportunity Growth

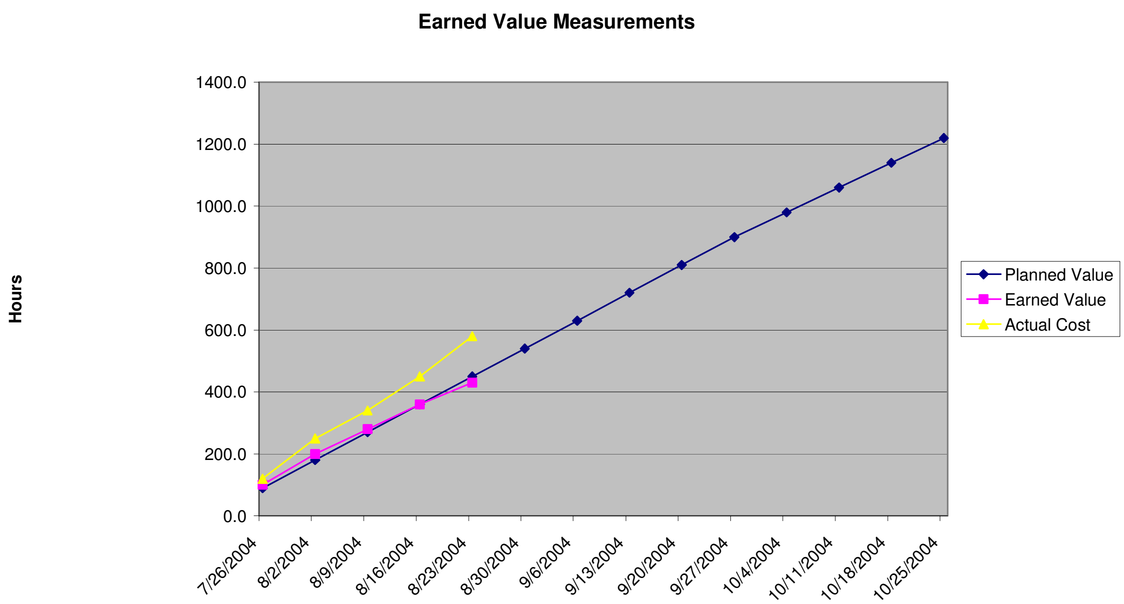
- How are the PM and account manager working to promote perceived value of the Company's delivery to the client?
- What are our strategies and financial plan for extension and expansion of this project, and for starting new projects in this account?
- Do we have a strategy for taking what we're doing here to another account? What are we doing to execute on it?

Process and Technologies

- What technologies have you used on this engagement?
- What Intwine best practices are you using, or are you creating, on this engagement?
- Where are your biggest knowledge gaps on this engagement?

Earned Value Metrics

Copy the entire Earned Value Chart from the project's Historical Earned Value worksheet into the document.



	7/26/2004	8/2/2004	8/9/2004	8/16/2004	8/23/2004	8/30/2004	9/6/2004	9/13/2004	9/20/2004	9/27/2004	10/4/2004	10/11/2004	10/18/2004	10/25/2004
Planned Value	90.0	180.0	270.0	360.0	450.0	540.0	630.0	720.0	810.0	900.0	980.0	1060.	1140.	1220.
Earned Value	100.0	200.0	280.0	360.0	430.0									
Actual Cost	120.0	250.0	340.0	450.0	580.0									