



NJ PMI Chapter

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***The Why, How & What of a Program Management
Review (aka Audit)***

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Rethink Possible



The Why, How & What of a Program Management Review (aka Audit)

PMI New Jersey Symposium
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Agenda

About the AT&T Project Management Center Of Excellence (PMCOE)

The “Why” of the Program Management Review Process

The “How” ...

The “What” ...

Our Lessons-Learned

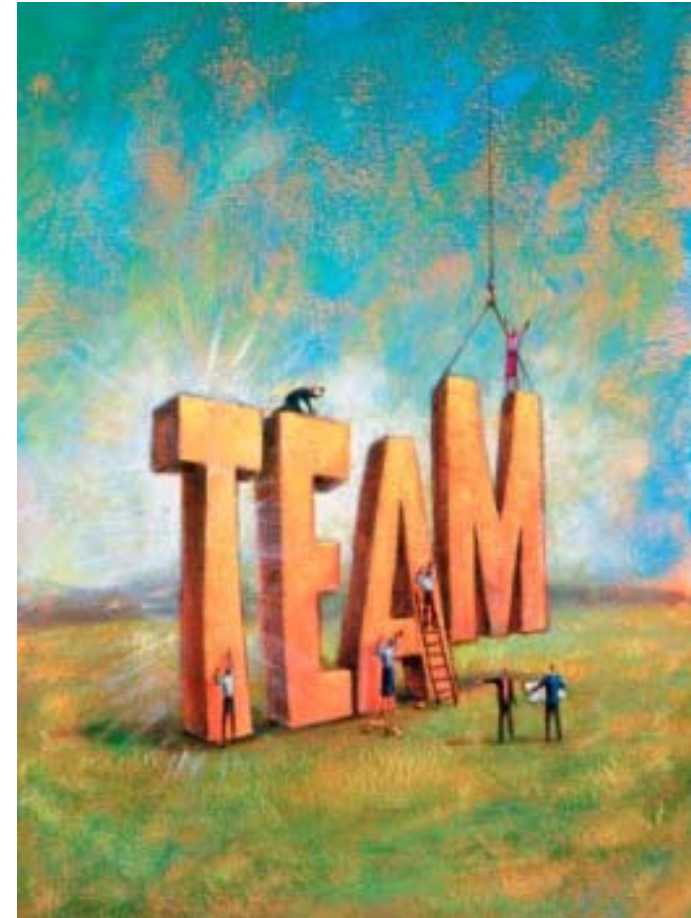
Your Questions



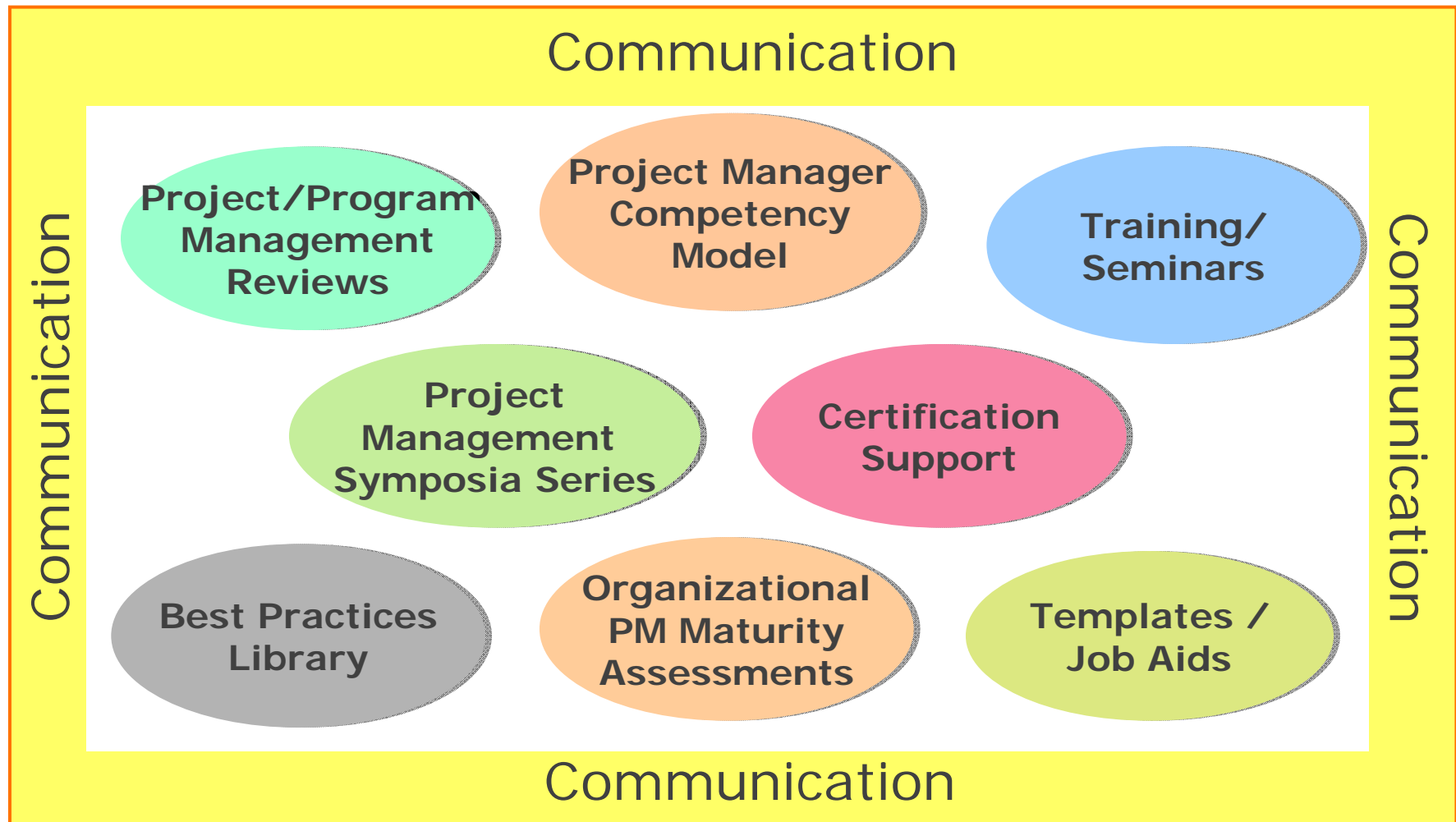


About the PMCOE

- Internal corporate advocate and consultant for improving AT&T's project and program management competency
- Works with AT&T organizations to *assess, leverage, expand, and continually improve* their project/program management competency
- Reports into the Corporate Program Office organization
- Maintains working relationships with many AT&T organizations

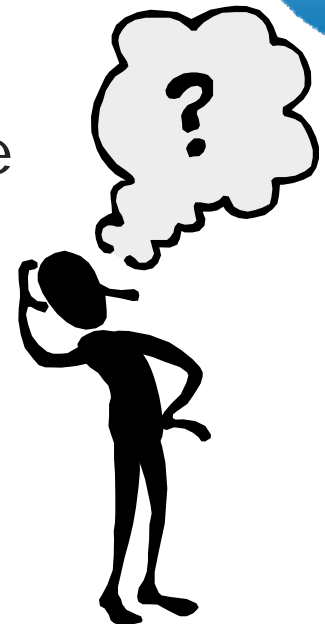


Key Focus Areas



The “Why” of the Program Management Review Process

- To provide an organizationally independent, objective assessment of the application of the Program Management Process
- To determine if and how the process is adding the value required to ensure the success of the overall program
- To identify areas providing the most challenge and develop plans to address them



The How ...

- Created a Value Proposition
 - Consistent management of programs
 - Identify required process revisions or training/retraining
 - Provide “on the spot” coaching support
 - Identify creative approaches that can be shared
 - No “gotcha” perspective employed!
- Developed a Set of Objectives
 - Ensure compliance with the Program Management & Governance Process
 - Drive program-specific corrective actions
 - Foster continuous improvement



The How ... *(continued)*

- Identified the participants & their responsibilities
 - Program Manager, Deputy Program Manager & Program Management Team Members
 - Executive Sponsor & other Supporting Executives
 - Project Managers
 - Program Management Review Team Lead & Members
 - Other key stakeholders as identified by the Program Manager (Directors, Executive Directors, AVPs)



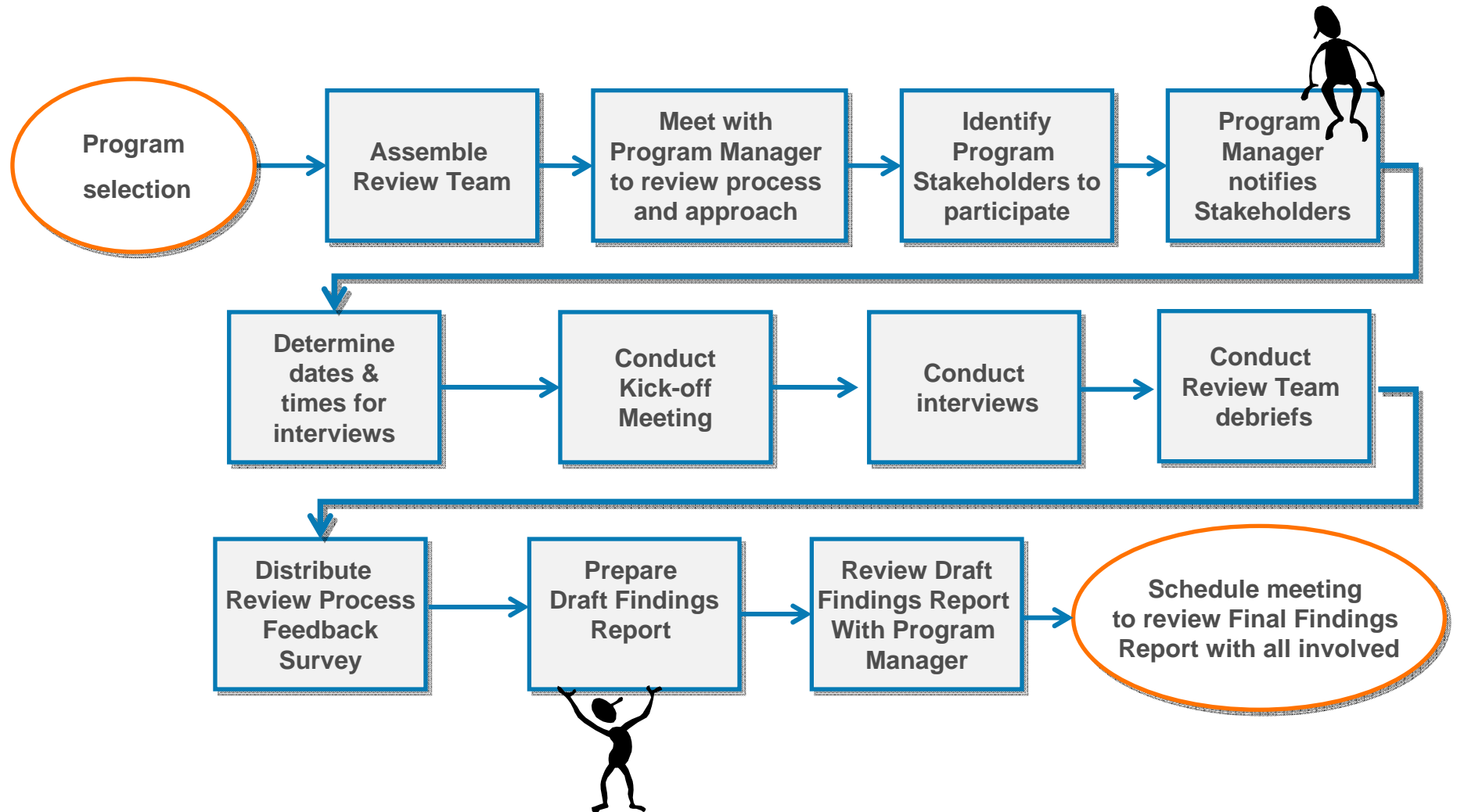
The How ... *(continued)*



- Created a Review Process Flow
 - A visual “picture” of the process and approach
 - Reiterates responsibilities of all participants
 - Manages expectations & alleviates any fears
- Held a kick-off meeting
 - Discuss the “why” for the review, value proposition, goals, objectives
 - Review the process to be applied (interviews, time required)
 - Introduce the Review Team
 - State what the next step will be – what they can expect



Process Flow Example



The What ...

- Developed Question Sets
 - Consider the different perspectives of the participants
 - Include a focus on the process “must-haves” & those areas unique to program management
 - Majority of open-ended work best – good for discussion
 - Include upfront, general questions
 - Can be by phase, focus areas, or anything else that fits
 - Close-out the questions with several that ask about how the program management process is helping or hindering
 - Consider a “big-bang” final question



Question Set Examples



Program Management – Change Management/Change Control

This area ensures that the program has a documented, agreed to change management/change control process in place and that it is being followed.

Q-18. Describe your Change Management/Change Control process.

Q-19. How has it been documented? Where?

Q-20. Has it been agreed to by the Executive Sponsor, Program Support Team, Lead PMs, etc.? How do you know?

**Program Manager
& Team Members**

**Lead Project
Managers**

6. Have your project's interdependencies with other projects within the program been identified? How? Are these actively managed and kept current? How? Discuss how these are communicated and the impact on plans and schedules.

7. What are your project governance requirements? How have these been documented in your project plan/s?

8. How does/do your project/s obtain launch approval? Is there a process that is followed? Where is this process documented?

4. What is your current satisfaction level with the program's status and progress?

5. What is your current satisfaction level with the program's status and progress?

**Executive
Sponsor**

The What ... *(continued)*

- Developed Findings Report
 - Bear in mind ... this is an “official” document
 - Include an Executive Summary & Summary of Findings
 - Align the documented findings with the Question Set(s) categories
 - Include the Review Process Feedback Survey information
 - Spell out the Action Plan to address any deficiencies
 - Be sure to include identified areas of strength as well as opportunities for improvement



Findings Report Example

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4.2 Business Relationship – Overall Communications Rating X
This area focuses on the program team's overall communications plan from a who, what, why, when, where, how often perspective

(Document the specific program management review findings in this area)

4.3 Business Relationship – Executive Sponsor Communications Rating X
This area provides a view of the communications that is provided to the Executive Sponsor, Executive Governance Committee, Steering Committee, etc.

(Document the specific program management review findings in this area)

4.4 Business Relationship – Commitment Rating X
This area focuses on the commitment to the program



The What ... *(continued)*

- Created Review Process Feedback Survey
 - Keep it short ... 10 questions maximum
 - Ask for feedback for that which you can act upon
 - Consider:
 - Did the Review Team clearly communicate information about the review process?
 - Was the right atmosphere created to allow for the exchange of thoughts and ideas?
 - Did the Review Team act in a supportive and professional manner?
 - Did the Review Team demonstrate an appropriate level of program management knowledge?
 - Were the right questions asked?
 - Was the time allocated for the interview the right length?
 - Allow for additional comments to be provided



Review Process Feedback Survey Example



1. The review team clearly communicated information about the program management review process.

- ☐ Strongly Agree
- ☐ Agree
- ☐ Neither Agree Nor Disagree
- ☐ Disagree
- ☐ Strongly Disagree

2. The review team provided an atmosphere that allowed for open and honest communications.

- ☐ Strongly Agree
- ☐ Agree
- ☐ Neither Agree Nor Disagree
- ☐ Disagree
- ☐ Strongly Disagree

8. In the space below, please provide additional comments regarding the review or suggestions on how the overall review process can be improved.



Our Lessons-Learned



- The amount of time allocated for the interviews is important – make sure this is stressed & understood
- You may need to tweak the interview questions
- Ask several content-specific questions about artifacts
- Consider an alternate delivery mechanism for interviews to maximize input
- Review the stakeholder set and determine if additions or deletions are necessary



Our Lessons-Learned *(continued)*

- A two-person team for the interviews works well
- Think about what program artifacts you can review in advance of the interviews
- Determine how many interviews you can realistically conduct
- Keep your scoring/rating model non-threatening, simple and easy to support
- Prepare a “suggested” message the Program Manager can use to notify the participants
- Verbal and documented feedback to the Program Team works best
- Perhaps ask about team morale and, if low, what the cause is
- Think about a scoring or question scheme that will streamline the Review Team debriefs



The Project Manager's Dream

A man knocked at the golden gates,
His face was scarred and old;
He stood before the man of fate,
For admission to the fold.
"What have you done," the gatekeeper asked,
"To gain admission here?"
I've been a Project Manager, sir, " he said,
"For many and many a year."
The pearly gates swung open wide,
The gatekeeper touched the bell.
"Come in and choose your harp," he said.
"You've had your share of hell!"



Questions

